

### ABBOTT LABORATORIES MAX - Version 1.0



# Sample Management Training Manual



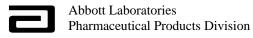
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#### Module 1: Introduction

#### Welcome

Welcome to MAX (Siebel ePharma TM)!

#### What is MAX?

MAX, for the home office user, automates the review process of practitioner profile and call address creations and sample transactions. Sales representatives record data for each professional profile, distribute samples, and collect signatures for sample distributions. This data is transferred electronically to the home office for compliance verification.

#### Purpose

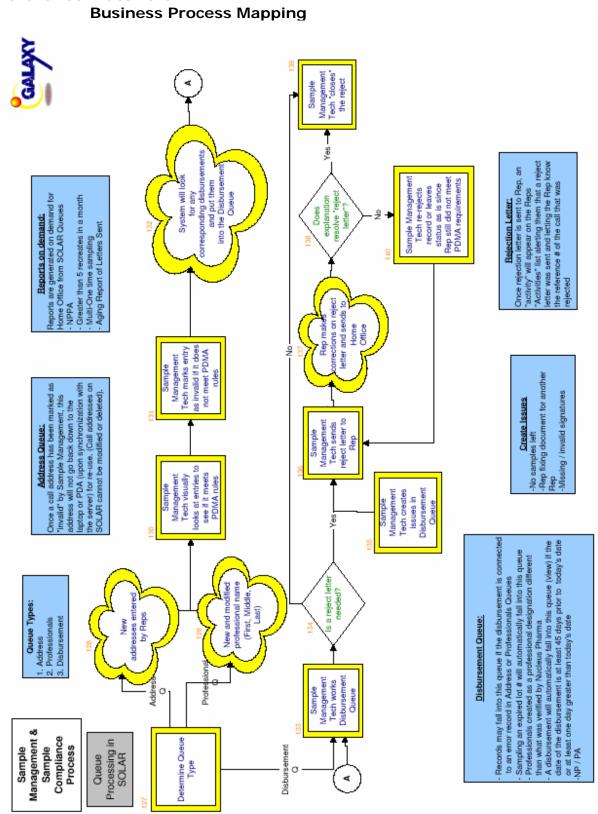
This training manual provides instructions for reviewing and verifying compliance fields of the medical professionals, profile record, call addresses, and electronic sample receipts. This guide provides instructions for creating pre-defined queries, assigning reject codes, creating and sending rejection letters to sales representatives, and the error processing of sample disbursements. This guide will also provide the user with instructions for using the Sample Management reports that have been created to aid in the process of maintaining compliance.

#### **Objectives**

From this guide you will be able to:

- Describe the purpose of MAX
- Navigate in MAX and customize views
- Generate pre-defined queries (PDQ)
- Verify accuracy of the records that populate the Professional, Address, and Disbursement views
- Process errors in profile, call address creation and sample disbursements
- Understand reject codes
- Print letters





# **Reference Materials**



#### **Basic Operating Procedures (BOPs)**

The following Basic Operating Procedures (BOPs) will serve as the guidelines for the processes outlined in this manual.

- BOP.V-03500706
- BOP.V-03500707
- BOP.V-03500708
- BOP.V-03500710

#### **Roles & Responsibilities**

**Sample Management** is responsible for the analysis of the Professional Review, Address Review, and Disbursement and Follows Up views and to verify that the records contained in each view meet compliance guidelines. Sample Management will review and assign reject codes on errors made to sample disbursements and send rejection letters to the appropriate sales representative for correction and closure.



#### Module 2: Getting Started

#### Logging onto MAX

Logon to MAX

To logon to MAX, follow the procedure below:

	A stier
Step	Action
	m
1	Open MAX by locating the MAX icon on the computer desktop.
2	Enter the username and password into the Siebel Life Sciences
	login screen (See Figure 1).
3	In Connect to, click on the down arrow and select Server.
4	Click <b>OK</b> .
	Upon successful logon, MAX opens. (See Figure 2).

Siebel Life Sciences			assword to log in.	
SIEBEL2000				
	Type your na	ame and pa	assword to lo	g in.
	<u>U</u> ser name:			
	Password:			
	Connect to:	Server		•
			OK	Cancel

Figure 1: Log-On screen

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Samples Administration Sample Management	

Figure 2: Opening screen of MAX



#### Hands-On Practice

Log on to MAX, using the user name and password supplied by your trainer.

#### **Hands-On Solution**

- 1. Double-click the MAX icon on the desktop.
- 2. Complete the Log On screen.

Note: Your user name and password may differ.



Figure 3 MAX logon screen

- 3. Click OK.
- 4. View the opening screen of MAX. (See Figure 2.)



#### Module 3: Navigating in MAX

Your work in Sample Management involves the review and analysis of many **records**, each of which represents a disbursement. Each record, in turn, is made up of many **fields**, or pieces of information. To help you organize your review of this data, MAX divides this data into different **views**, or collections of fields, and then provides navigation bars that help you move from screen to screen and from view to view. Our goal in this section is to review the MAX navigation bars and some of the terms that will be used in the step-by-step procedures that make up this manual.

#### The Screen Bar

A **screen** is a collection of views that are all related to a common work area. In Sample Management, your work will be divided between two screens:

- Samples Administration: Used to review historical sample disbursements for auditing purposes.
- Sample Management: Used to review the professional names, professional addresses, disbursements, and signatures associated with calls made by sales representatives.

The Screen bar allows you to navigate between work areas. Note that the Screen bar, shown in Figure 4, contains two tabs, Sample Administration and Sample Management, which correspond to the main Sample Management work areas.

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	Samples Administration Sample Management	
		7
	The Screen bar	
		J

#### Figure 4 The Screen bar



Using the Screen bar to navigate

To use the Screen bar to navigate to a screen, follow the procedure below.

Step	Action
1	Click one of the tabs in the Screen bar.

#### Hands-On Practice

Use the Screen bar to navigate to the Sample Management screen.

When you are through, check your work on the next page.



#### Hands-On Solution

- 1. Click the Sample Management tab in the Screen bar.
- 2. The Sample Management screen will be displayed.

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🛛 History List 💠 🔿	Sample Event:	
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Figure 5 Opening view of the Sample Management screen

#### The View Bar

When you use the Screen bar to navigate to a screen, MAX opens a preselected or default view. In Sample Management, that view is the Disbursements and Follow-Up view. This view is used to display the disbursement record and to monitor and follow up on rejection letters. If you need to work with another view, use the View bar.

The **View bar** displays all of the views that make up a screen and allows you to navigate to a different view.



Using the View	To use the	View bar to navigate to a different view, follow the procedure
bar to navigate	below.	
	Step	Action
	1	Click one of the tabs on the View bar.

#### **Pre-Defined Query Bar**

Queries are used to quickly retrieve information that is routinely sought. Queries filter and sort records, which makes viewing the data contained in the records much easier.

For each view, MAX provides a number of pre-defined queries that correspond to the most common searches used with each view. In addition, MAX allows you to create and save queries. All of these pre-defined or saved queries can be selected from the **Pre-Defined Query bar.** (See Figure 6.)

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	Goodman	John		Physician Assistant	00111	V		SEBLADM	3/5/2003 1:	38:57 PM	
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	Grant	Hugh		Physician	00111	V		SEBLADM	3/5/2003 11	1:22:49 AM	
	Jackson	Jesse		Physician	64211	V		FERRAJR	8/20/2002 1	1:26:23 AM	
	Jagger	Mick		Nurse Practitioner	00111	V		SEBLADM	3/5/2003 11	1:22:54 AM	
	Leguizamo	John		Physician	00111	V		ROGERKE	12/12/2002	9:48:47 AM	
	Lopez	Jennifer		Physician	00111	V		SEBLADM	3/5/2003 1:	48:51 PM	
	Mayer	John		Physician Assistant	00111	V		ROGERKE	1/31/2003 1	10:52:04 AM	
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	O'Neill	Michael	P	Physician	00002	V		CLEVEJB	12/17/2002	4:08:24 PM	
	OneTime	Sample		Physician	64304	V		WENDEJC	10/1/2002 1	0:02:45 AM	
	Prunty	James		Physician	64304	V		WENDEJC	10/1/2002 1	1:14:05 PM	
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	Snow	Crystal		Nurse Practitioner	00111	V		ROGERKE	1/31/2003 1	1:59:41 AM	
	Starski	Bart		Physician	31803	V		SEBLADM	3/5/2003 1:	52:07 PM	
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Figure 6 The Pre-Defined Query bar for the Professional Review view



Figure 6 shows the drop-down list that makes up the Pre-Defined Query bar for Professional Review view. In the Professional Review view, "0-Changed" is the default or pre-selected query that will be executed automatically when the view opens.

In addition, the status bar will show the number of records found by the query. (See Figure 6.) This number can be helpful in organizing your work.

#### Hands-On Practice

Use the Pre-Defined Query bar to find the records in the Professional Review view that have been marked "Invalid."

See the solution on the next page.



#### Hands-On Solution

- 1. Go to the Professional Review view, click the down arrow in the Pre-Defined Query bar, and select "1-Invalid."
- 2. The view will display all Professional records that have been marked as invalid and the status bar will indicate that there are 24 records. (See Figure 7.)

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	Tahara	Ruth	Physician	00111		~	SEBLADM		2003 4:44:49 PM	
	Vail	Kathleen	Physician	00111		~	SEBLADM		2003 10:24:05 AM	
	Valder	Linda	Physician	00111		~	SEBLADM		2003 10:27:00 AM	
	Waak	Ludmila	Physician	00111		~	SEBLADM		2003 10:21:10 AM	
	Wachter	Sonja	Physician	00111		~	SEBLADM		2003 10:22:31 AM	
	Wacker	Camila	Physician	00111		~	SEBLADM		2003 10:23:22 AM	
	Walf	Alex	Physician	00111		~	SEBLADM		2003 4:14:48 PM	
	Williams	Jack	Physician	00111		~	SIGNADN	8/28	/2002 2:03:29 PM	

Figure 7 Result of using the Pre-Defined Query bar to find the number of invalid records in the Professional Review view



#### The History Bar

As you move through different screens and views in MAX, you may want to re-trace your steps. The **History bar** is designed to simplify this task.

The History bar is made up of:

- **History List:** Displays a drop-down list of all the screens and views you have opened prior to reaching the current view. Click one of the entries to jump directly to a prior screen or view.
- **Back/Forward buttons.** Work like the Back and Forward buttons in an Internet browser, to let you navigate back or forward one screen at a time.
- Threads. Allows you to move directly to any of the views listed.

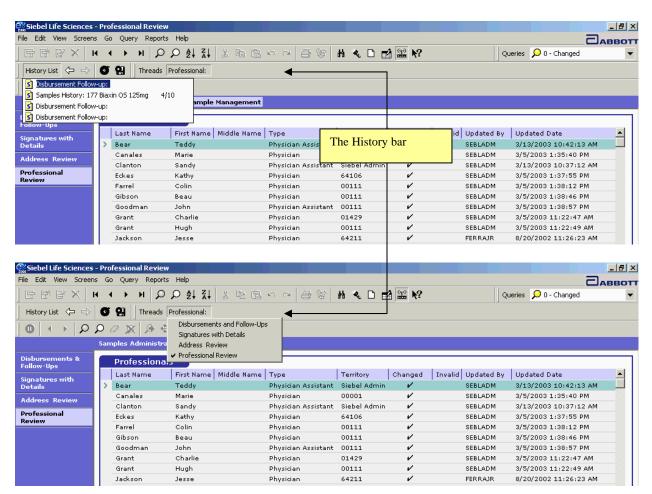
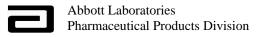


Figure 8 The History bar, showing the History List and Threads



#### The MAX Toolbar

The MAX toolbar (see Figure 9) contains some of the most common tools and navigational devices you will use during a work session.

ile Edit View Screens	Go Query Reports	s Help					_	
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Figure 9 The MAX toolbar

**Tip:** Hover the pointer over a toolbar button to display tool tips that will remind you of the button's functions.

Note that some of the tools are dimmed or will return an error message, indicating they are unavailable to Sample Management.

#### **Navigation Shortcuts**

Using the mouse to click on a toolbar is a simple way to navigate and perform other tasks but some people find it faster to use **navigation shortcuts**, or combinations of keystrokes, MAX provides a number of navigation shortcuts. These navigation shortcuts are shown on the MAX menus. (See Figure 10.) Navigation shortcuts are usually shown as:

[keystroke 1] + [keystroke 2]

A complete listing of navigation shortcuts can be found in Appendix C.

Using a navigation shortcut

To use a navigation shortcut follow the procedure below.

Step	Action
1	Press and hold down the first key and then press the second
	key.



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Disbursements & Follow-Ups		Professiona	ls								
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Professional Review		Clanton		Sandy		Physician Assistant	Siebel Administrator	V		SEBLADM	3/13/2003 10
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		Gibson		Beau		Physician	00111	~		SEBLADM	3/5/2003 1:3
		Goodman		John		Physician Assistant	00111	~		SEBLADM	3/5/2003 1:3

Figure 10 Navigation shortcuts shown on a MAX menu

The most useful navigation shortcuts are shown in the table. In addition, in many of the list applets, the TAB key can be used to move from field to field.

Navigation Shortcut	Function
Ctrl + Up	Navigate to the previous record
Ctrl + Down	Navigate to the next record
Ctrl + Page Up	Navigate to the first record
Ctrl + Page Down	Navigate to the last record
Ctrl + Q	Create a new query
Ctrl + R	Refine a query
Enter	Execute a query
Ctrl + S	Save query under a new name

Additional navigation shortcuts can be found in Appendix C.

#### **Understanding List and Form Applets**

The Disbursements & Follow-Up view, shown in Figure 11, is divided into **applets**, or sections of the view that use one of two data layouts.

- List applets. A list applet uses a table-like layout in which every row represents a different record. List applets can also be used to display details for a selected record. See, for example, the Rejections applet in Figure 11, where each row contains details about one of the reject codes assigned to the selected disbursement record.
- Form applets. A form applet is used to display details that cannot be shown accurately in a table. Note the signature in the Sample Signature applet, for example.



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Figure 11: List and form applets

Some applets can be displayed as *either* a list or a form. See, for example, the Rejections applet in Figure 11. The table lists details for the reject codes but some of the information is cut off because the columns are too narrow. You could adjust the width of the columns but there is an easier and faster way to see all of the details. The key is the toggle button, highlighted in Figure 12.

#### Using the toggle

button

To move between a list and form applet, follow the procedure below.

Step	Action
1	Click the toggle button $\overline{\mathbf{C}}$ .
	The layout will change from a list to a form applet.
2	Click the toggle button again.
	The layout will change from a form to a list applet.



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Figure 12 Using the toggle button to convert a list applet to a form applet



#### Using the Alpha Bar to Sort Records

The Professional Review view contains an extra navigation feature that can be used to sort long lists of Professional records by last name – the Alpha bar.

When you execute a query, the asterisk (\*) is pre-selected in the Alpha bar. This lets you view all of the records in alphabetical order.

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Figure 13 Professional Review query results

#### **Hands-On Practice**

Use the Alpha bar to display all the last names that begin with "S."



#### Hands-On Solution

- 1. Click the "S" tab in the Alpha bar.
- 2. The view displays all the records in which the professional's last name begins with S.

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#### Figure 14 Result of using "S" tab to sort professional records



#### **Customizing the List Applets**

Customizing the list applets can simplify navigation. Customizing includes moving columns, resizing them, adding or deleting columns, and changing the order of the columns.

#### Customizing the MAX view

To customize the view of MAX, follow the procedure below:

Step	Action
1	Select the view to be changed.
2	To modify the columns in that view click on <b>View &gt; Columns Displayed</b> .

		Modify columns by clicking on View, Columns Displayed	
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#### Figure 15: Customizing Views

Step	Action
3	The Columns Displayed dialog box opens.
	(See Figure 16.)



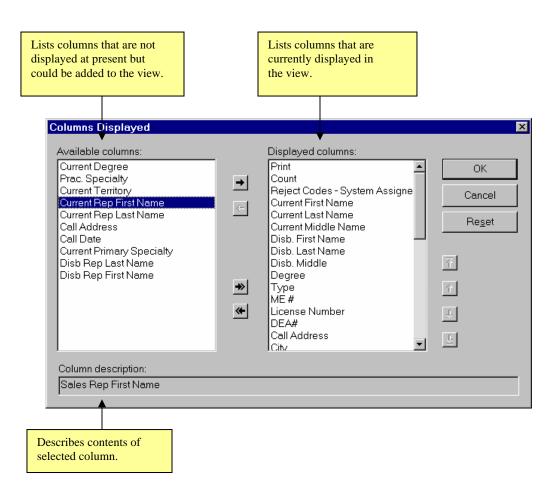


Figure 16 The Columns Displayed dialog box

#### Add and Remove Columns from the View

#### Adding columns

to a view

To add and remove columns to a view, follow the procedure below:

Step	Action
1	Add columns by selecting the column from the Available columns window.
	Note: To select multiple columns, press the <b>Ctrl</b> key and then click the columns one by one.
2	Click the arrow that points to the Displayed columns window.
3	Click <b>OK.</b> Note: If you decide the changes are not required, click <b>Cancel.</b>



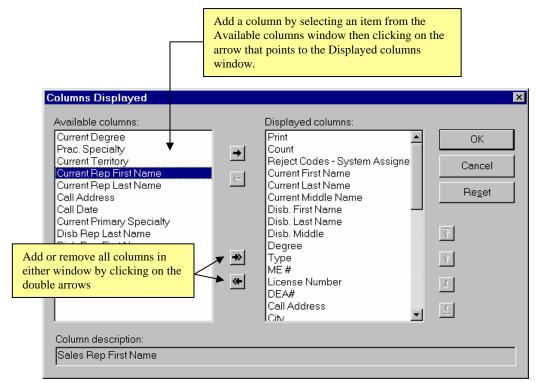
*Removing columns from a view* 

To remove columns from a view, follow the procedure below:

Step	Action
1	Click the name of the column in the Displayed columns window. Note: To select multiple columns, press the <b>Ctrl</b> key and then
	click the columns one by one.
2	Click the arrow that point to the Available columns window.
3	Click OK.
	Note: If you decide the changes are not required, click Cancel.

**Note:** If you want to return to the original view of the columns, open the Columns Displayed dialog box and click **Reset.** 

All of the items in the Available columns window can be moved to the Displayed Columns window by clicking on the double arrow that points to the Displayed columns window. You can also remove all the items in the Displayed columns window by clicking on the double arrow that points to the Available columns window.





#### Figure 17: Using the Columns Displayed dialog box to add and remove columns

#### Move Columns in the View

The order of the columns on display can be changed by using the Columns Displayed Dialog box or by clicking and dragging the columns in the view.

#### Moving columns via the Columns Displayed

window

To move a column by using the Columns Displayed window, follow the procedure below:

Step	Action
1	Navigate to <b>View &gt; Columns Displayed</b> from the menu bar.
2	From the <b>Columns Displayed</b> pop-up window, select the column to be moved by clicking on it.
3	Click on the arrows until the column name is placed in the location desired.
4	Repeat steps 2 and 3 until all columns are moved into the desired location.
5	Click OK.



Columns Displayed		×
Available columns: Current Degree Prac. Specialty Current Territory Current Rep First Name Current Rep Last Name Call Address Call Date Current Primary Specialty Disb Rep Last Name Disb Rep First Name	Displayed columns: Print Count Reject Codes - System Assigne Current First Name Current Middle Name Disb. First Name Disb. First Name Disb. Last Name Disb. Middle Degree  ✓ ME # License Number DEA# Call Address Citv	OK Cancel Reset Move a column by selecting the column then clicking on the up or down arrows provided. The top and bottom arrows move the column to the first and last position.
Column description: Abbott - Call Contact Type		

Figure 18: Moving columns using the Columns Displayed dialog box (columns from the Disbursements & Follow-Up view)



# Moving Columns via the drag and drop To move a column using the drag and drop method, follow the procedure below: Star A stice

Step	Action
1	In the list applet where the column to be moved is located, click on the column header that is to be moved.
2	Drag the column to the new location.
	<b>Note:</b> Notice the red bar that indicates that the column is being moved. The placement of the red bar will be where the column is moved.

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Prin Reject Codes	s - Current	First Name	Current Last Name	Current Midd 📥
				¥ •

Figure 19: Moving Columns using the drag and drop method

**Note:** The column heading slides to the left or right. Notice in the example below, the Current Last Name column is moving into the Current First Name column position.



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Figure 20: Move a column by clicking and dragging

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Figure 21: Moving columns - Final result

#### **Resize Columns**

Columns can be resized to accommodate viewing of information by clicking on the divider between columns and dragging to the left or right. In the example below, the Current Middle Name column does not display the entire column name so the column should be wider.



Figure 22: Resizing columns



## Resizing a column

To resize a column, follow the procedure below:

Step	Action
1	From the view to be adjusted, click and hold the column divider of the column to be resized. Notice when the divider is clicked, the cursor changes into a split bar with arrows on either side.
2	While holding the mouse, drag the column to the desired width.
3	Release mouse to set column size.

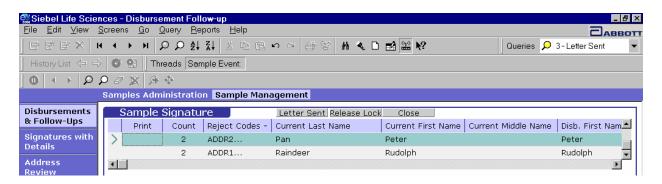


Figure 23: Resized column - Final result

#### **Hands-On Practice**

Navigate to the Professional Review view and then display the Columns Displayed dialog box.

Remove the Last Name, First Name, and Middle Name columns.

Use the Column Displayed dialog box to restore the Last Name, First Name, and Middle Name columns.

See the solution on the next page.



#### Hands-On Solution

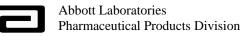
- 1. Use the Screen bar and View bar to navigate to the Professional Review view.
- 2. Select Columns Displayed from the View menu.
- 3. In the Columns Displayed dialog box, press the **Ctrl** key and then click the columns shown below.
- 4. Click the left-pointing arrow.

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- 5. Click OK.
- 6. To restore the columns, select Columns Displayed from the View menu.
- 7. In the Columns Displayed dialog box, click **Reset**

- or -

press the **Ctrl** key and then select the Last Name, First Name, and Middle Name columns under Displayed columns, click the rightpointing arrow, and then click **OK**.



#### Using MVGs to Get Additional Information

MVG stands for multi-valued grid, a dialog box that uses a list applet to display information about a field that contains more than one value. An ellipses button (...) in a field signals the presence of an MVG.

In the Sample Signature applet, for example, the ellipses button displays the Rejection Codes and Description dialog box, which provides more information about the reject codes assigned to a disbursement record.

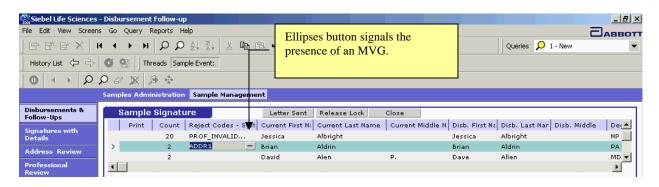


Figure 24 Displaying the ellipses button in a field

#### Using an ellipses

*button to display* T *an MVG* p

To use the ellipses button to display a multi-valued grid (MVG) use the procedure below:

Step	Action	
1	Click the ellipses button.	
2	The MVG dialog box will be displayed. (See Figure 25).	
3	Review the data.	
	<b>Note:</b> You can customize the list applet to suit your work methods, using the same techniques you used to customize other list applets.	
4	When you are through, click <b>Close.</b>	



	Click the ellipses button to view the MVG.			
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	the med	dical needs of my patients. I acknowledge receipt of those items		
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Figure 25 The MVG displays information for a field that contains more than one value.



#### **Using Pick Lists to Enter Data**

A "pick list" contains a pre-defined list of values (or LOVs), which are usually displayed in a drop-down list. Pick lists are used to make data entry fast, consistent, and compliant with business rules.

Figure 26 displays a pick list that Sample Management can use to assign reject codes to a disbursement record. (We'll discuss these codes in more details in the module on the Disbursements & Follow-Up view.)

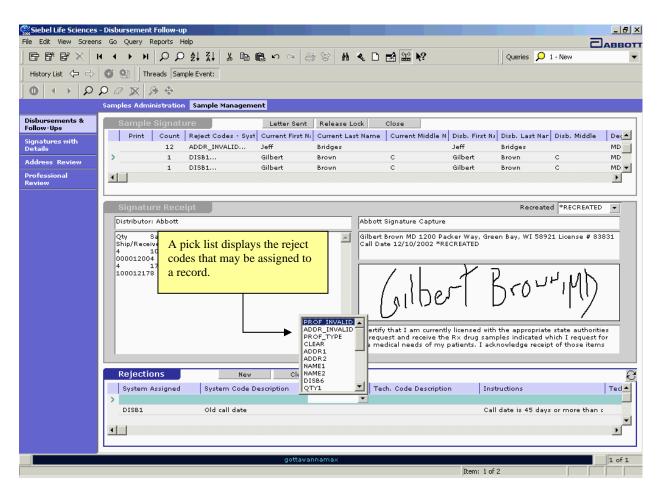


Figure 26 A pick list that displays the reject codes that may be assigned to a record



#### Module 4: Introduction to Queries

Queries are used to quickly retrieve information that is routinely sought. Queries filter and sort records, which makes viewing the data contained in the records much easier. A number of pre-defined queries are provided for each phase of your work and we'll look at those in more detail when we start to work with the Professional Review, Address Review, and Disbursements and Follow-Up views.

You can also create and save queries to be used regularly. All fields displayed are available for query. The fields that can be queried for your ease of use are as follows but not limited to:

- Sample product
- Lot number
- Recreate .
- **Employee ID**
- Territory number (at time of signature capture)
- Professional's name (current)
- Professional's name (at time of signature capture)
- Sales representative's name (current)
- Sales representative's name (at time of signature capture)
- Zip code
- Reject code
- Process status
- Call date
- Reference number
- Log-in ID

The query buttons to be used from the lower tool bar are:



P New Query (gray shaded magnifier)



Execute Query (white shaded magnifier)



# **Executing a Pre-Defined Query**

A number of pre-defined queries are provided for each view. These queries are contained in the Pre-Defined Query bar.

#### Executing a predefined query

To execute a pre-defined query, follow the procedure below:

Step	Action
1	Click the down arrow in the Pre-Defined Query bar and select one of the entries. (See Figure 28.)
2	The query will automatically run once it is selected.
	The results will display the most current data, since all of the queries are dynamic.

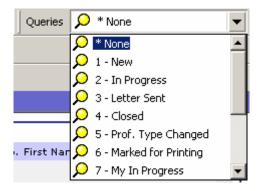


Figure 27: Query drop-down list



## **Creating and Saving a New Query**

# Creating a new query

To create a new query, follow the procedure below:

Step	Action
1	Navigate from the menu bar to <b>Query</b> > <b>New Query</b> or click on the New Query button $\stackrel{\frown}{\sim}$ in the lower tool bar.
2	Click in the column to be queried and then enter information to be queried.
	For example, click in the territory column, and then enter the desired territory number.
3	If the query needs to be defined even further, click in the next column to be queried, and enter additional information to be queried.
	For example, click in the Process Status field and enter New.
	If the query does not need to be further defined, go directly to step 4.
4	To execute the query, press <b>Enter</b> or click on the <b>Execute</b>
	Query button $\checkmark$ on the lower tool bar.

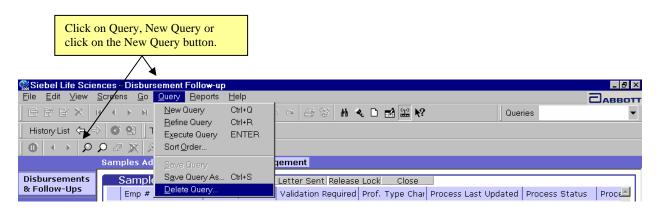


Figure 28: Create a query



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#### Figure 29: Create a query by territory

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#### Figure 30: Query results

Step	Action
5	Save the query by navigating from the menu bar to <b>Query</b> > <b>Save Query As</b>
6	Enter the name of the query.
7	Click <b>OK</b> . The new query will now be available from the <b>Queries</b> drop down list for future queries.

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Figure 31: Saving a query



Save Query As	×
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· · · · · · · · · · · · · · · · · · ·	
<ul> <li>None</li> <li>1 - New</li> <li>2 - In Progress</li> <li>3 - Letter Sent</li> <li>4 - Closed</li> <li>5 - Prof. Type Changed</li> <li>6 - Marked for Printing</li> <li>7 - My In Progress</li> <li>8 - My Letter Sent</li> <li>9 - Recreated Calls within the last 30 daysII</li> <li>10- Recreated Calls within the last 60 days</li> </ul>	
OK Cancel	

Figure 32: Save Query As dialog box



# Using a Wildcard (\*) in a Query

A **wildcard** (\*) allows you to use a symbol – the wildcard – to create a pattern and then search for all values that match that pattern. Imagine, for example, that you are aware that a record has been created for a nurse or a nurse practitioner and you need to find all records for nurses or nurse practitioners.

A wildcard search can help you find the records quickly.

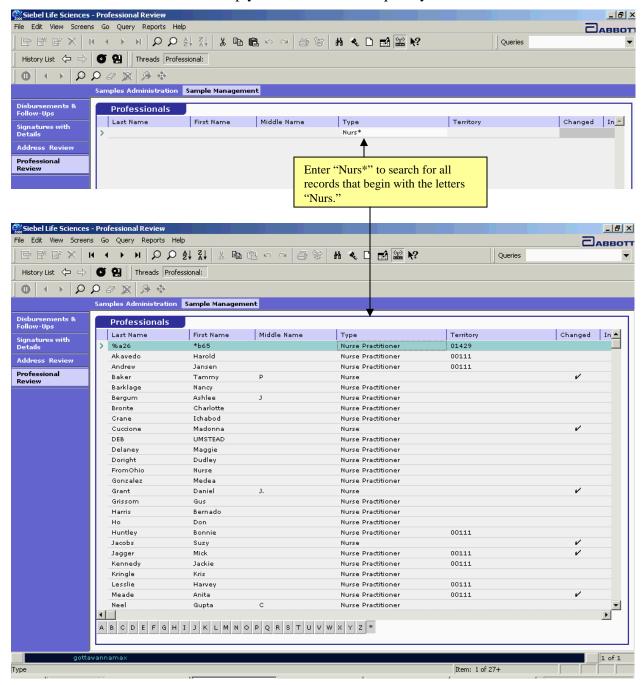


Figure 33 Using a wildcard search to find Nurses or Nurse Practitioners



#### Hands-On Practice

A rejection letter has been sent concerning a disbursement made to Dr. Mary Richter. The sales representative has responded and now you need to review the disbursement.

Create a query that will display all the disbursement records for Dr. Richter.

See the solution on the next page.



#### Hands-On Solution

- 1. Use the Screen bar and View bar to navigate to the Disbursements & Follow-Up view.
- 2. In the Pre-Defined Query bar, select the pre-defined query, "Letter Sent" to display all the records for which letters have been sent.
- 3. From the menu bar, click on Query, Refine Query
- 4. In the Current Last Name field, type "Richter" and press **Enter** or click the Execute Query button in the lower toolbar.
- 5. The Sample Signature applet will display the disbursement records in which the Current Last Name is "Richter."
- 6. Use the scroll bar or the arrows in the MAX toolbar to navigate to the correct record.

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Figure 34 Result of using a wildcard search to find records for "Richter"



# **Maintaining Queries**

Within the Query menu, other available options include:

- Refining a query
- Executing a query
- Deleting a query

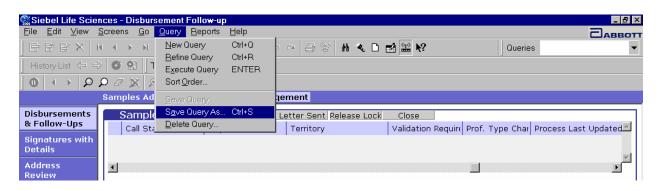


Figure 35: Other query options

#### **Refining Queries**

Periodically existing queries may need to be refined or updated. Queries that you have created or that have been created by the Systems Administrator can be modified without deleting and creating a new query.

*Refining a query* To refine a query, follow the procedure below:

Step	Action
1	From the Pre-Defined Query bar, select the query that you would like to refine.
	The query will execute.
2	Navigate from the menu bar to <b>Query &gt; Refine Query</b> .
3	Click in the column to be queried. Enter new information to be queried.
	For example, click in the territory column; enter the new desired territory number.



Step	Action
4	If you are refining a query that you have created, Navigate from the menu bar to <b>Query &gt; Save Query</b> . If you are refining a query that has been created by the System Administrator, use the menu bar to navigate to Query > Save Query As and rename the query.
5	Click OK.

#### **Deleting Queries**

When it has been determined that a query is no longer required, the query can be deleted from the system and the Pre-Defined Query bar.

**Note:** Only queries created by you can be deleted. Queries created by the System Administrator cannot be deleted.

*Deleting a query* To delete a query, follow the procedure below:

Step	Action
1	Navigate from the menu bar to <b>Query</b> > <b>Delete Query</b> .
2	From the <b>Delete Query</b> dialog box, select the query to be deleted from the available list.
3	Click <b>OK</b> .

Delete Query		×
Query <u>n</u> ame:		
11- By Territory		
	ОК	Cancel

Figure 36: Delete Query dialog box



# Module 5: Professional Review

The Professional Review is used for identifying all newly added or modified professionals. The Professional Review displays the last name, first name, middle name and professional type. When a sales representative adds or modifies a professional's name, this information will be displayed in the Professional Review view and the record will be marked as Changed. The newly added or modified names must be reviewed by Sample Management to ensure that it meets compliance guidelines.

You can use the Professional Review to:

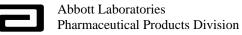
- review new and modified professional names.
- determine whether each professional name is compliant.
- manually update a record from Changed to Valid if it is compliant.
- manually update a record from Changed to Invalid if it is not compliant.

### Accessing the Professional Review View

#### Accessing the Professional Review view

To access the Professional Review view, follow the procedure below:

S	tep	Action
1		Click <b>Sample Management</b> in the Screen bar.
2	e e e e e e e e e e e e e e e e e e e	Click <b>Professional Review</b> in the View bar.



# Understanding the Columns Displayed on the Professional Review View

Figure 37 shows Professional Review, which is made up of the following columns:

Column	Contents
Last Name	displays the last name of the professional.
First Name	displays first name of the professional.
Middle Name	displays the middle name of the professional.
Туре	displays the type of professional.
Territory	displays the territory of the sales representative that created or modified the record.
Changed	indicates the status of the record is new or modified and has not been reviewed by Sample Management
Invalid	indicates Sample Management has determined that the record does not meet compliance requirements and therefore has an invalid status.
Updated By	indicates the user name of the last person in home office to update the record.
Updated Date	indicates the date and time the record was last updated.

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Details	>	A	A	A	Physician		· ·	SIGNADN	2/18/2003 1:53:51	РМ	
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		Aaron	Allen		Physician	00002	V		8/16/2002 9:33:21/	AM	
Professional Review		Abbott	Abbott	A	Physician		V		8/16/2002 9:33:21/	AM	
Neview		Abbott	Ben		Physician	00111	r		8/16/2002 9:33:21/	AM	
		Abbott	Clara		Physician Assistant	00111	r	ROGERKE	2/7/2003 3:24:21 Pf	vi	
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Figure 37 The Professional Review view



## Using Queries to Filter Records in the Professional Review view

If you look at the Figure 38, you will see that the Queries drop-down list box includes a number of pre-defined queries (PDQs).

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Figure 38 Selecting a Pre-Defined Query

Pre-defined Query	Result
0 – Changed	displays all of the new or modified records assigned to you since the last time you logged onto the system. This is preselected when you open the Professional Review.
1 – Invalid	displays all records that have been marked as invalid.
2 – Valid	displays all records in which both the Changed field and the Invalid field are blank.
3 – All	displays all Changed, Valid, and Invalid records.

You can also create a one-time query so that you see only those professionals within a specific territory, or you can create a custom PDQ so that it will always be available for your use.

Figure 39 demonstrates the results of a query for all changed records.



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	Alen	David	Ρ.	Physician		~		8/16/2002 9:33:21 AM	
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	Amma	Amma		Physician		~		8/16/2002 9:33:21 AM	
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	Armstrong	Neil	J	Physician Assistant	00001	~		8/16/2002 9:33:21 AM	
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	Austin	Reggie		Physician		~		8/16/2002 9:33:21 AM	
	Axelrod	Bruce		Physician		~		8/16/2002 9:33:21 AM	
	Badinov	Boris	A	Physician		~		8/16/2002 9:33:21 AM	
	Bag	Nonna		Physician		~		8/16/2002 9:33:21 AM	
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Figure 39 Professional Review view showing query results



# **Reviewing Professional Records**

Reviewing Professional records	To determine whether a professional name is valid or invalid per compliance guidelines, follow the procedure below:								
	Step	Action							
	1	Use the Screen bar and the View bar to navigate to the Professional Review view.							
		When you first open this view, the default query that is displayed in the Pre-Defined Query bar is the Changed query.							
	2	Refine the Query by region, district or territory. This will display the addresses within the area(s) that you cover.							
		Save this query for future use.							
	3	View the first name on the list and compare it to the following guidelines:							
		Valid names per compliance							
		A full last name and full first name.							
		A full last name, a first initial AND a full middle name.							
		A full last name, a full first name and middle initial.							
		<b>Invalid names</b> A full last name and first name of "Dr."							
		A full last name, a first initial AND NO middle name.							
		A name containing numbers or symbols (**).							
	4a	If the professional information is incomplete or does not follow the compliance guidelines, click in the <b>Invalid</b> column. (See Figure 40.)							
	or	<b>CAUTION:</b> If both the Changed and Invalid columns are left blank, the professional name will be treated as if it is valid.							
	4b	If the professional name is valid, click on the checkmark in the <b>Changed</b> column to remove it. (See Figure 40.)							
	5	Repeat steps 3 and 4 until you have reviewed all changed records.							



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Details		A	A	A	Physician		~	SIGNADN	2/18/2003 1:53:51 PM	
Address Review		AAMann	Mann		Physician				2/20/2003 4:09:02 PM	
		Aaron	Allen		Physician	00002	V		8/16/2002 9:33:21 AM	
Professional Review		Abbott	Abbott	A	Physician		~		8/16/2002 9:33:21 AM	
Neview		Abbott	Clara		Physician Assistant	00111	~	ROGERKE	2/7/2003 3:24:21 PM	
		Abcd	×××		Physician		~		8/16/2002 9:33:21 AM	
		Adler	Paul		Physician		~		8/16/2002 9:33:21 AM	
		Affleck	Ben		Physician	00111	~	ROGERKE	2/20/2003 4:10:35 PM	
		Africa-Floyd	Shellie		Physician		~		8/16/2002 9:33:21 AM	
	>	Albright	Jessica		Physician	00001		1	2/20/2003 4:10:38 PM	
		Aldrin	Brian		Physician Assistant		~		8/16/2002 9:33:21 AM	
		Alen	David	Ρ.	Physician		V		8/16/2002 9:33:21 AM	
		Allen	Alicia	A	Physician		~		8/16/2002 9:33:21 AM	

Figure 40 Professional Review -- Marking records as valid or invalid

When you mark a record as valid it is moved to a list of valid records. In the same way, when you mark a record as invalid, it is moved to a list of invalid records.



In Figure 41, pre-defined queries have been used to display records that have been marked as valid and invalid.

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Details	>	01	Spy		Physician			1	SIGNADN	1/31/2003 1:01:55 PM	
Address Review		55ab&	90b5\$@		Physician			V	SIGNADN	1/30/2003 1:12:23 PM	
		Al	Available	0	Physician			V	SIGNADN	10/29/2002 11:06:35 AM	
Professional Review		Amma0	Amma0		Physician			~	SIGNADN	1/30/2003 1:13:08 PM	
Review		Angelo	Michael		Physician			~	SIGNADN	10/29/2002 11:05:28 AM	
		Lee	т		Physician	00111		~	SIGNADN	11/1/2002 1:20:14 PM	
		Priestly	Jason		Physician	00111		~	SIGNADN	10/29/2002 11:06:15 AM	

Figure 41 Displaying records that have been marked as valid and as invalid

**CAUTION:** Leaving both the Changed field and the Invalid field blank will mark the record as Valid.

You can use the Valid and Invalid PDQs to review your decisions and make adjustments as needed. If you decide that any record should be changed to invalid, simply click in the Invalid field and the record will be moved from the valid list to the invalid list.



#### **Hands-On Practice**

Create a query that will display all Changed Professional records for territory 64304.

Use the compliance guidelines to mark each of the professional records as valid or invalid.

See the solution on the next page.



#### Hands-On Solution

- 1. Use the Screen bar and the View bar to navigate to the Professional Review, if necessary.
- 2. The Changed PDQ is selected by default.
- 3. From the menu bar, Click on Query, Refine Query.
- 4. Click in the Territory field, type "64304" and press Enter.

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Details	>			64304				
Address Review								
Professional Review								

Figure 42 Creating a query for Territory 64304

5. Compare each name to the compliance guidelines (see page 51 under Reviewing Professional Records) and mark it as invalid or valid.

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	new	without addı	Physician	64304	<u>۷</u>	WENDEJC	3/20/2003 11
	> professonal	primary add	Physician	64304	V	WENDEJC	3/20/2003 11

Figure 43 Finished review of changed records for Territory 64304



# Module 6: Address Review

The Address Review is used to identify new addresses in the system. When a Sales representative creates a new call address for a professional, Sample Management can view the new addresses from the Address Review applet. These addresses must be reviewed to ensure that they meet compliance guidelines.

You can use the Address Review to:

- review new addresses.
- determine whether each field in the address is compliant.
- manually update a record from Changed to Valid if it is compliant.
- manually update a record from Changed to Invalid if it is *not* compliant.

**Note:** Marking an Address as invalid removes the address from the computers of all sales representatives who share that call address.

# Identifying Compliant Addresses

The following are examples of compliant addresses:

- 1. 2300 Randolph Lane Chicago, IL 60123
- RR, RFD or RT (Rural Route) Box 23 Birmingham, AL 35532
- P.O. Box 750 Rural Address (must say "rural" if using P.O. Box) Billings, MT, 94165
- Dominican Medical Building Kenosha, WI 53140 (physical locations are acceptable in lieu of street address)
- 5. 200 Blue Hills Blvd. P.O. Box 10



Operating Procedure Number: BPM-Effective Date:

Kansas City, MO 64110 (contains both a P.O. Box and a street address)

Sales representatives can only add new addresses. They do not have the ability in MAX to modify any call address within the system.

## Accessing the Address Review View

# Accessing the

Address Review

view

To access the Address Review view, follow the procedure below:

Step	Action
1	Click Sample Management in the Screen bar.
2	Click Address Review in the View bar.

	Image: Threads Address:       Image: Threads Address:       Image: Threads Image									
	ples Administration San	nple Management	:							
sbursements &	Addresses									
natures with	Street Address	City	Postal Code	State	Territory	Changed	Invalid	Updated By	Updated Date	-
tails >	10322 St. Arthur	St. Ann	63074	мо	00111	~		SEBLADM	3/5/2003 11:23:12 AM	
dress Review	215 St. Alexus St	Elk Grove	60177	IL	00001	V		SEBLADM	3/5/2003 11:23:14 AM	
6	100 Ontario Street	Chicago	60611	IL	00111	~		SEBLADM	3/5/2003 11:23:17 AM	
ofessional view	Resurrection Hospiteal	Chicago	60634	IL	00111	V		SEBLADM	3/5/2003 11:23:19 AM	
	340 Easy Street	Des Moines	4444	IA	00111	V		SEBLADM	3/5/2003 11:23:22 AM	
	10322 St. Arthur	St. Ann	63074	мо	00111	r		SEBLADM	3/5/2003 11:23:24 AM	
	73 47th Street	Kenosha	53143	WI	00111	~		SEBLADM	3/5/2003 11:23:26 AM	
	300 Sandy Road	Chicago	60611	IL	00111	V		SEBLADM	3/5/2003 11:23:29 AM	
	1 South Water	Chicago	60611	IL	00111	V		SEBLADM	3/5/2003 11:23:31 AM	
	200 Peachtree Blvd	Atlanta	23456	GA	00111	V		SEBLADM	3/5/2003 11:23:34 AM	
	256 Golf Road	Northland	45667	sc	00111	~		SEBLADM	3/5/2003 11:23:36 AM	
	8416 Hunter ave	Niles	60065	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:23:49 AM	
	1212 control In	Morton Grove	70055	IL	Siebel Adn	V		SEBLADM	3/5/2003 11:23:51 AM	
	Beatles plaza 12	Shaumburg	68790	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:23:53 AM	
	7000 West	Chicago	55555	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:23:57 AM	
	7000 East	Chicago	55555	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:23:59 AM	
	7000 North	Chicago	55555	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:24:01 AM	
	5400 Lemon In	Elk Grove	60088	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:24:03 AM	
	3600 Apple In	Morton Grove	60087	IL	Siebel Adn	~		SEBLADM	3/5/2003 11:24:06 AM	
	2412 Orange In	Buffalo Grove	60086	IL	Siebel Adn	V		SEBLADM	3/5/2003 11:24:08 AM	

Figure 44 The Address Review view



# Understanding the Columns Displayed on the Address Review View

The Address Review view is made up of the following columns:

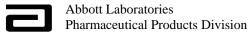
Column	Contents
Street Address	displays the street address.
City	displays the city.
Postal Code	displays the zip/postal code.
State	displays the state.
Territory	displays the sales territory of the representative who created the address

# Using Queries to Filter Records in the Address Review View

The Pre-Defined Query bar contains the following queries:

<b>Pre-Defined</b>	
Query	Result
0 – Changed	displays all of the new or modified records added since
	the last time you logged onto the system. This pre-defined
	query is pre-selected when you open the view.
1 – Invalid	displays all records that have been marked as Invalid.
2 – Valid	displays all records in which both the Changed and the
	Invalid field are blank.
3 – All	displays all Changed, Valid, and Invalid records.

You can also create a one-time query so that you see only those professionals within a specific territory, region or salesforce, or you can save a query as a custom PDQ so that it will always be available for your use.



# **Reviewing Changed Call Addresses**

Reviewing changed call		
addresses	To review	changed (new) call addresses, follow the procedure below:
	Ston	Action

Step	Action
1	Use the Screen bar and the View bar to access the Address
	Review view.
2	The default PDQ, "0 Changed," will execute and the changed
	records will be displayed in the view.
3	Refine the query by region, district or territory. This will
	display the addresses within the area(s) that you cover.
	Save this query for future use.

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ress iew	5665 Peachtree	Louisville	40215	KΥ	Siebel Administrator
essional	792 Church St NE Ste 430	Marietta	30060	GA	Siebel Administrator
iew	2332 Leyden Ave	River Grove	60171	IL	Siebel Administrator
	792 Church St NE Ste 330	Marietta	30060	GA	Siebel Administrator
	566 Naperville Rd	Naperville	60563	IL	64304
	615 Maryhill Ln	Louisville	40207	KY	64211
	4300 N Main St Apt 126	Racine	53402	WI	64304
	3915 N Lynnwood Pl	Peoria	61614	IL	64304
	7655 Mill Crk	Atlanta	40025	GA	64304
	7765 N Harlem Av STE444	Chicago	60635	IL	64304
	1122 Anywhere Ave	Anytown	12345	IL	64702
	795 Church St NE	Marietta	30060	GA	Siebel Administrator
	792 Church St NW	Atlanta	30318	GA	Siebel Administrator
	620 Marshall Ct	Louisville	40202	KΥ	Siebel Administrator
	PO Box	Grover	62837	IL	43000
	Dfsdf	Sdfadf	45455	MO	64704
	Afddsf	Fadadsf	33333	MO	64704

Figure 45: Address Review query results



Step	Action
4	Select the first record displayed and review the following fields to ensure they meet compliance requirements:
	Street Address
	➢ City
	<ul><li>Postal Code (Zip Code)</li></ul>
	➢ State
5a	If a record is missing information or has questionable information, click in the <b>Invalid</b> column.
or	If both the Changed and Invalid columns are left blank, the address will be treated as if it is Valid.
5b	If the address information is valid, click on the checkmark in the <b>Changed</b> column to remove it.
6	Repeat steps 4 and 5 until all new addresses have been reviewed.

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Soursements Follow-Ups	Addresses							
anatures with	Street Address	City	Postal Code	State	Territory	Changed	Invalid	Update
tails	790 Church St NW Ste 230	Marietta	30060	GA	Siebel Admi	¥		
dress	> 5665 Peachtree	Louisville	40215	KY	Siebel Admi			
view	792 Church St NE Ste 430	Marietta	30060	GA	Siebel Admi	~		
ofessional	2332 Leyden Ave	River Grove	60171	ΙL	Siebel Admi	~		SIGNA
view	792 Church St NE Ste 330	Marietta	30060	GA	Siebel Admi	V		SEBLA
	615 Maryhill Ln	Louisville	40207	KY	64211	~		WILLIL
	4300 N Main St Apt 126	Racine	53402	WI	64304	~		οττοί
	3915 N Lynnwood Pl	Peoria	61614	IL	64304	~		οττοί
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	795 Church St NE	Marietta	30060	1101	ii the Chang			
	792 Church St NW	Atlanta	30318	GA	Siebel Admi	~~		
	620 Marshall Ct	Louisville	40202	KΥ	Siebel Admi	~	$\sum$	
	PO Box	Grover	62837	IL	43000	*	× ,	WILLIL
	Afddsf	Fadadsf	33333	MO	64704	V		WILLIL
	286 Letterwood	Highland Park	60035	IL	Siebel Admi	~		
	286 Leonard Wood S	Highland Park	60035	IL	Siebel Admi	~		
	1 B	Raymondville	65555	МО	64704	V		WILLIL
								Þ

Figure 46: Address Review – Marking addresses valid and invalid



#### Invalid Call addresses

Marking an address record as "invalid" prevents the address information from being used by any representative who shares that call address. Once the representative(s) synchronize with the server, the sales representative who created the invalid address, or any other sales representative who shares this information, will not be able to view or access the invalid address for use with future calls.

All disbursements associated to an address marked "invalid" will move to the Disbursements & Follow-Up view. From this view you can review the assignment of reject codes and generate a letter to the Sales Representative who created the Invalid address for correction. (This will be reviewed when we discuss Disbursements & Follow-Up.)

Any information discussed with the representative regarding the rejected call, can be documented in the Comments area of the Rejections form applet. The sales representative(s) will not see any information that is documented in the Comments area; these comments will only be displayed to Sample Management.

If it is determined that the call address that had been marked as Invalid is actually Valid, Sample Management has the ability to change it to Valid.

The next time the sales representative(s) synchronize with the server, the call address record initially tagged as invalid will be displayed in the call address view on the reps PDA for future use.

#### Hands-On Practice

Use a query to display all of the valid address records for Territory 00111.

Review each of the addresses to be sure it meets compliance guidelines.

See the solution on the next page.



#### Hands-On Solution

- 1. Use the Screen bar and View bar to display the Address Review view.
- 2. The Changed PDQ will execute automatically when the view opens.
- 3. From the menu bar, click on Query, Refine Query.
- 4. Click in the Territory field and type "00111" and then press **Enter** or click the Execute Query button in the lower toolbar.
- 5. Review each address and mark it as invalid or valid.

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gnatures with	Street Address	City	Postal Code	State	Territory	Changed	Invalid	Updated By	Updated Date	
tails	1200-B Packer Way	Milwaukee	54321	WI	00111	-		SIGNADN	11/1/2002 1:38:30 PM	
dress Review	200 Orange Grove	Miami	44444	FL	00111			SEBLADM	3/4/2003 3:56:44 PM	
	1 N. State Street	Chicago	60611	IL	00111			SEBLADM	3/7/2003 9:44:20 AM	
ofessional view	145 Wallace st	Findlay	45840	он	00111		V	SEBLADM	3/20/2003 1:05:45 PM	
	1506 Evans st	BAINBRIDGE	31717	GA	00111		V	SEBLADM	3/20/2003 1:05:49 PM	
	3623 Dewey Gray cir	Augusta	30909	GA	00111		~	SEBLADM	3/20/2003 1:05:54 PM	
	1129 Lower Main st	Wailluku	96813	HI	00111		V	SEBLADM	3/20/2003 1:05:56 PM	
	1200 Central ave	Wailuku	96813	HI	00111		V	SEBLADM	3/20/2003 1:05:59 PM	
	1560 chevy chase dr	Glendale	91206	CA	00111		V	SEBLADM	3/20/2003 1:06:02 PM	
	1245 Wilshire blvd	Los Angeles	90017	CA	00111		~	SEBLADM	3/20/2003 1:07:28 PM	
	226 Main	Clinton	47240	IN	00111			SEBLADM	3/20/2003 1:07:37 PM	
	4100 Gateway blvd	Newburch	47630	IN	00111		V	SEBLADM	3/20/2003 1:06:16 PM	
	12425 Old Meridian str	Carmel	46032	IN	00111		~	SEBLADM	3/20/2003 1:06:19 PM	
	7148 ambassador rd	Baltimore	21244	MD	00111		1	SEBLADM	3/20/2003 1:07:42 PM	
	6510 Kenilworth ave	Riverdqale	20737	MD	00111		1	SEBLADM	3/20/2003 1:07:44 PM	
	825 Monroe st	Grenada	38901	MS	00111		~	SEBLADM	3/20/2003 1:07:46 PM	
	4500 North ave	Chicago	67700	IL	00111		~	SEBLADM	3/20/2003 1:07:49 PM	
	> 344 Oak Street	Chicago	60611	IL	00111			SEBLADM	3/7/2003 3:14:01 PM	

Figure 47 Result of re-reviewing valid addresses for Territory 00111



# Module 7: Disbursements & Follow-Up

When a Professional Name or Call address has been marked as invalid, the system will process this information and compare it against a group of pre-set business rules and automatically assign one or more reject codes to the disbursement records associated to the invalid Professional or Call Address record. The disbursement records (historical and future) associated to the invalid records can be reviewed in the Disbursements & Follow-Up view.

Once a Professional Name has been marked as Invalid, all future calls made to the Invalid name by any sales representative will continue to fall into the Disbursements and Follow up view until the Professional Name has been corrected by the sales representative and Sample Management marks the corrected (Changed) record as Valid. Since Call Addresses cannot be modified or corrected by the sales representative, MAX prevents future use of an invalid call address by removing it from the sales representative's laptops and PDAs.

This view also displays any disbursement record that has been automatically assigned reject codes by the system even if the professional name or call address is deemed valid.

The system automatically assigns a reject code when sample disbursements fail to meet certain business rules. The most common examples include:

- sampling a Nurse Practitioner Physician Assistant in a non-sampling state.
- creating a sample disbursement against an expired lot #.
- synchronizing a call to the server that is older than 45 days of the system date.

Because reject codes are so important to this view, we'll discuss them in more detail later in this module.

You can use the Disbursements & Follow-Up view to:

- query and filter the disbursement records and manage your workload.
- review the reject code(s) assigned to a record.



- add and clear reject codes.
- generate and print rejection letters to the sales representatives.
- close a record.

#### Accessing the Disbursements & Follow-Up View

Accessing the Disbursements & Follow-Up To view be

To access the Disbursements & Follow-Up view, follow the procedure below:

Step	Action
1	Select Sample Management from the Screen bar.
2	Select the <b>Disbursements &amp; Follow-Up</b> from the View bar.

#### Understanding the Structure of the Disbursements and Follow-Up View

The Disbursements and Follow-Up view, shown in Figure 48, is made up of three different applets:

- **Sample Signature:** A list applet displaying sample disbursement records.
- **Signature Receipt:** A form applet that displays the Electronic Sample Receipt for the highlighted and selected sample disbursement in the Sample Signature list applet.

This copy of the electronic receipt will display all of the fields available and visible from the signature capture screen on the PDA including the signature of the professional.

• **Rejections:** Displays the reject codes that have been assigned by the system or by Sample Management.

This applet also allows Sample Management to add or clear reject codes and to add comments to the sample disbursement record.



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Disbursements & Sample Signature Letter Sent Release Lock Close	
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SA - INCORRECT Signature doesn't look right OTY1 Incorrect Quantity Inc	Please collect signature again.
QIVI Incorrect Quantity Inc	orrect quanti

Figure 48 The Disbursements and Follow-Up view

# Using Pre-Defined Queries in the Disbursements & Follow-Up View

The PDQs in this view correspond to the status of the disbursement record:

<b>Pre-defined Query</b>	Result
None	displays a blank screen.
1 - New	displays records that have been assigned reject codes,
	either by Sample Management or by the system.
2 – In Progress	displays New records that have been edited or updated by
	Sample Management.
3 – Letter Sent	displays records for which rejection letters have been
	sent to the Sales Representative and the status has been
	changed by Sample Management to Letter Sent.
4 – Closed	displays all records that have been closed by a Sample
	Management and the status has been changed to Closed.



You can also create custom PDQs so that it will always be available for your use.

The query filters the records within a view. The example below demonstrates a query for all **New** records with reject codes.

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Figure 49 Query results

#### **Hands-On Practice**

Create and save a query that will display only new records for Territory 32706.

Save the query under the name "11 - New for Territory 32706."

Tip: You may need to scroll to the right to see the Territory field.



#### Hands-On Solution

- 1. In the Pre-Defined Query bar, click the down arrow and select "1 New."
- 2. Click the New Query button in the lower toolbar.
- 3. Scroll to the right until the Territory field is visible.
- 4. Click in the Territory field and type "32706."
- 5. Press **ENTER** or click the Execute Query button.
- 6. The view will display only records for territory 32706.

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#### Figure 50 Result of querying for new records for Territory 32706

- 7. Click Query, Save As in the menu bar.
- 8. Type a name for the new query and click **OK**. (See Figure 51.)



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Figure 51 Saving a new query for Territory 32706



# **Reviewing the Columns Displayed under Sample Signature**

The columns in the Sample Signature list applet give you an extensive view of the sample disbursement record and its status:

Column	Contents
Print	displays either a blank or a checkmark, which
	indicate you are ready to print a rejection letter to the
	sales representative.
Count	displays the total number of reject codes assigned to
	the disbursement record.
<b>Reject Codes – System</b>	displays an abbreviated description of the system-
Assigned	assigned reject code.
Current First Name,	displays the current name of the Professional, which
Current Last Name,	may be different than the name displayed in
Current Middle Name	Disbursement First, Middle or Last Name if it has
	changed since the disbursement was done.
Disb. First Name, Disb.	displays the name as it was at the time of the
Last Name, Disb.	disbursement.
Middle	
Degree	displays the degree (professional designation) of the
	professional.
Туре	displays the type of professional.
ME#	displays the unique ME# assigned to the professional.
License #	displays the professional's state license number.
DEA#	displays the professional's DEA #.
Call Address, City,	displays the call address.
State, Zip Code	
Reference #	displays the unique reference number assigned to the
	disbursement record. The reference # also appears on
	the rejection letter.
Call Date	displays the date the representative disbursed the
	samples to the professional. (If the call has been
	"recreated" the call date will be different than the
	signature date.)
Signature Date,	displays the date and time the professional signed for
Signature Time	the samples.
Recreated	displays a textual value of Recreated, which means
	that the sale representative has recreated the record in
	an effort to correct errors or offset lost data.
Receipt Requested	displays a checkmark field, which means that the
	representative has requested that a sample receipt be



Column	Contents
	sent to the professional.
Call Status	displays the status of the call. The statuses are either synchronized or submitted.
Employee #	displays the Employee # of the Sales Representative who created the call record.
Territory	displays the territory of the Sales Representative who created the call record.
Validation Required	this field is only used for technical support.
Prof Type Changed	displays a checkmark for those professionals whose professional type has changed since the disbursement was made (Example: Disbursement captured the professional as a physician, but the verification process through Nucleus Pharma indicated the professional is actually a Nurse Practitioner.)
Process Last Updated	displays the date and time the record was last updated by Sample Management.
Process Status	displays the record status.
Process Close Date	displays the date the record's status was changed to Closed by Sample Management.
Call Created By	displays the login name of the Sales Representative who created the record.
Disclaimer Text	displays the disclaimer displayed when the professional signed for the samples.
Locked By	displays the name of the Sample Management personnel who is currently working on the record.
# of Days Since Letter Sent	displays the number of days since the record status was updated to Letter Sent.
Aging Category	displays the category that the record is in the aging process A = More than 180 days B = Between 68 and 179 days C = Between 38 and 67 days D = Between 31 and 37 days E = Less than 31 days

Sample Signature also includes three other buttons that we will discuss later:

- Letter Sent
- Release Lock
- Close



# Taking a Closer Look at the Signature Receipt Applet

The Signature Receipt applet displays a copy of the Electronic Sample Receipt. It contains the following fields:

Field	Content
Distributor	Company that employs the sales representative
	distributing the drug samples.
Qty, Sample,	Details about the drug samples disbursed to the
Manufacturer, Lot	professional
Number,	
Ship/Received	
Recreated	A field that indicates that the disbursement record is a
	recreated call.
Professional name,	The professional information captured on the Sales
address, license	Representative's PDA
number, Call date	
Signature	Electronic signature captured on the Sales
	Representative's PDA
Disclaimer	The disclaimer displayed to the professional who
	signed for the samples.

## **Reviewing the Columns Displayed under the Rejections Applet**

The Rejections applet displays the reject codes that have been applied to the sample disbursement record either by the system or by Sample Management. This section includes the following columns:

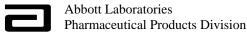
Field	Content
System Assigned	displays an abbreviated name of the rejection code
	assigned by the system.
System Code	displays a description of the rejection code.
Description	
Tech Assigned	displays rejection codes assigned by Sample
	Management during a review of the disbursement
	record.
<b>Tech Code Description</b>	displays a description of the tech-assigned rejection
	code (rejection codes assigned by Sample
	Management).



Field	Content			
Instructions	displays the instructions that will appear in the			
	rejection letter sent to the Sales Representative.			
	5			
	Note: If Sample Management selects the reject code			
	"Other", this field will display, "Please see			
	comments." Click the ellipses at the end of this field			
	to display a dialog box where you can enter an			
	explanation that will be printed on the rejection letter.			
Tech Comments	displays comments entered by Sample Management.			
	Note: This field is to be used for internal notes that			
	will <i>not</i> be included in the rejection letter.			
Date Closed	displays the date and time Sample Management			
	changed the status of the call to closed .			
Status	displays the status of the record.			
Created	displays the date and time the rejection record was			
	created either by the system or by Sample			
	Management.			
Created By	displays the user ID of the of the person who created			
	the reject code (Sample Management) or of the			
	system ID when the system adds the reject code.			
Updated	Last date the record was updated			
Updated By	Login id of the person who last updated the record			

Rejections also include two buttons which will be defined shortly:

- New
- Clear



## Working with Reject Codes

MAX will automatically assign reject codes to sample disbursements for the following reasons:

- If a professional name or call address has been marked as Invalid, all of the associated sample disbursements will get marked with a reject code of Prof Invalid or Address Invalid.
- If a sample disbursement was made against an expired lot number.
- If a nurse practitioner (NP) or physician assistant (PA) have been sampled in a state where this is not allowed.
- If a sample disbursement was made with a future call date.
- If a sample disbursement comes through the server with a call date that is 45 days old.

You can view the reject codes (system or tech assigned) that have been assigned to a sample disbursement in the Sample Signature list applet or in the Rejections list applet.

In many cases, more than one reject code will be assigned to a disbursement. For that reason, the Sample Signature list applet uses a multi-value grid (MVG) to display information about the reject codes. To access a multi-value grid, click the ellipses button that appears in the field. (See Figure 52.)

Note that the information shown in the MVG is read-only. To add or clear reject codes, you need to use the Rejections applet. (We'll discuss this shortly.)



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#### Figure 52 Displaying information about a system-assigned reject code

Figure 53 shows another way to get even more information about the reject codes assigned to a sample disbursement: Click the toggle button that appears at the upper right corner of the Rejections applet. The list view changes to show a form applet, which describes the reject codes as well as the instructions that will appear in the rejection letter to the Sales Representative. This applet can help you determine whether the existing reject codes are valid and help you determine whether you need to manually assign other reject codes to the record.

A detailed list of reject codes is contained in Appendix A.



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Figure 53 Using the toggle button to display more information about an error code



# **Adding Reject Codes**

As you review the sample disbursement record, you may find that there are more violations that require the addition of more reject codes to the disbursement record.

#### Adding a techassigned reject code

To add a tech-assigned reject code, use the following procedure:

Step	Action
1	In the Rejections applet, click New.
	In the list view, a blank line will appear. In the form view, a dialog box will appear with instructions.
2	Under Tech Assigned, click the down arrow and select one of the options from the pick list.
	For every reject code but Other, the system will fill in the description and instruction columns for you.
	If you select Other, go to steps 3 and 4.
3	In the Instructions column, click the ellipses button that appears at the end of the phrase, "Please see comments."
4	A small dialog box will appear. Select the text in that dialog box and then type your instructions to the sales representative.



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dress Review	> 1 DISB1 Gilbert Brown	C Gilbert Brown	C MD
ofessional	1 DISB1 Gilbert Brown	C Gilbert Brown	C MD
view			<u>.</u>
	Signature Receipt	Recreate	d *RECREATED -
	Distributor: Abbott	Abbott Signature Capture	
	Qty Sample Manufacturer Lot Number	Gilbert Brown MD 1200 Packer Way, Green Bay, WI 589	21 License # 83831
	Ship/Received 4 106 Prevacid 30mg 1/30 TAP	Call Date 12/10/2002 *RECREATED	
	000012004 Received		
	4 178 Biaxin OS 250mg 4/10 Abbott 100012178 Received		1
		1 / 16051 170	1511
	PROF INVALI		
	ADDR_INVALI		e state authorities
	PROF_TYPE CLEAR	request and receive the Rx drug samples indicated we medical needs of my patients. I acknowledge receip	
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	ADDR2 NAME1		
	Rejections New Clie NAME2		
	System Assigned System Code Description QTY1	Tech. Code Description Instructions	Ted
	>		
	DISB1 Old call date	Call date is 45 day	s or more than c
			Þ
	gottawannamax		1 of :
		Item: 1 of 2	

Figure 54: Selecting a new reject code



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] History List 💠 🔿	🍼 🐏 🛛 Threads Sample Event:					
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Disbursements & Follow-Ups Signatures with Details Address Review Professional Review	1 DISBURS	des - Syst Current First Na Cu MENT5 Owen Me	alease Lock rrent Last Name aney ron cch	Close Current Middle N Disb. First N Owen Allen Aaron	ة Disb. Last Nar Disb. Mi Meaney Aaron Mitch	iddle De( PA DO Dr. V
Neview						
	Signature Receipt				Recreated	-
	Distributor: Abbott		Abbott	Signature Capture		
	Qty Sample Manufactur Ship/Received 6 105 Prevacid 15MG / 6 106 Prevacid 30MG / Click the ellipses Instructions field.	bbott PK12345 Received bbott 345678A Received	GA1234	Affa And Received the RX IT	MD ems indicated for the I	MEDICAL ISED WITH
	Please See	Comments	E AP	PROPRIATE STATE AUTHORITIES	S AND AUTHORIZED TO RE	QUEST
		<b></b>				
		Flease titioner sampled in r NP sam	See Comi	comments Da	te Closed Status	Created 3/5/2003 1/30/2005
	1	Select the text in th box and type the in that will appear in t letter.	structions			

Figure 55: Entering instructions to accompany the "Other" reject code



# Using the Tech Comments Field

You may add pertinent information regarding the disbursement or your own follow up information in the Tech. Comments field. This information will *not* print on the rejection letter. Expand the Tech. Comments column by clicking the ellipses button at the end of the field.



**Note:** This field holds a maximum of 100 characters.

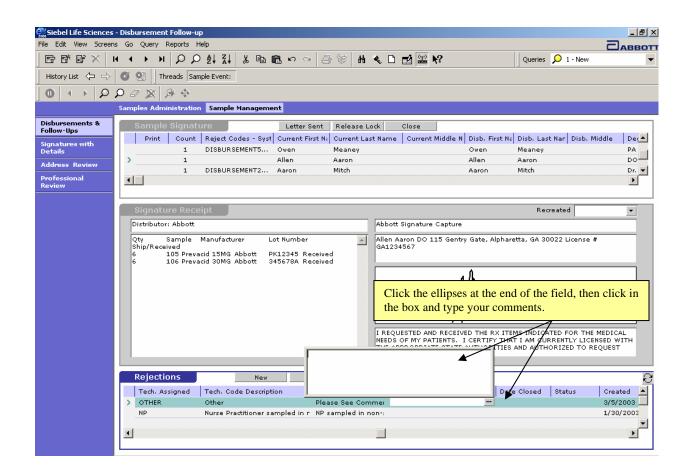


Figure 56 Expanding the Tech Comments column



#### **Hands-On Practice**

Find the new disbursement records for the professional, "Rothchild Mara."

Add a reject code "DISB5 - Invalid/Incomplete Signature."

Add a Tech Comment "Rep may have to re-create call."



#### **Hands-On Solution**

- 1. Select "1-New" from the Pre-Defined Query bar.
- 2. Click the New Query button in the lower toolbar.
- 3. Click in the Current First Name field and type "Rothchild."
- 4. Press **ENTER** or click the Execute Query button in the lower toolbar.

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<b>0</b>   ← →   <b>0</b>	
_	Samples Administration Sample Management
Disbursements & Follow-Ups	Sample Signature Letter Sent Release Lock Close
Signatures with Details	Print         Count         Reject Codes - Syst         Current First Name         Current Last Name         Current Middle N         Disb. First Na         Disb. Last Nar         Disb. Middle           2         PROF_INVALID         Rothchild         Mara         Rothchild         Mara
Address Review	
Professional Review	
	Signature Receipt Recreated 🗸
	Distributor: Abbott Abbott Signature Capture
	Qty Sample Manufacturer Lot Number 🔄 Rothchild Mara MD 1 South Water, Chicago, IL 60611 License # 2222
	5 178 Biaxin OS 250mg 4/10 Abbott 100012178 Received
	Rothald
	I REQUESTED AND RECEIVED THE RX ITEMS INDICATED FOR THE MEDICAL NEEDS OF MY PATIENTS. I CERTIFY THAT I AM CURRENTLY LICENSED WITH THE APPROPRIATE STATE AUTHORITIES AND AUTHORIZED TO REQUEST
	Rejections New Clear
	System Assigned System Code Description Tech. Assigned Tech. Code Description Instructions Tech
	> PROF_INVALID Professional is invalid Name invalid: On attached ESR dra
	ADDR_INVALID Address is invalid Addr. Invalid: On attached ESR dra
gottawa	annamax 1 of 1
Call Contact First Name	Item: 1 of 1

#### Figure 57 Result of querying New disbursement records for Current First Name "Rothchild"

- 5. Click the New button in the Rejections applet.
- 6. Click in the Tech Assigned field and then click the down arrow to see a list of reject codes.
- 7. Scroll to and select the reject code "DISB 5."
- 8. Review the description of the reject code that is displayed in the Rejects applet.
- 9. Scroll to the right and click in the Tech Comments field.
- 10. Click in the box and type a note, "Rep may have to re-create call." (See Figure 58.)



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Professional Review		
	Signature Receipt	Recreated
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		Mara MD 1 South Water, Chicago, IL 60611 License # 2222
	Ship/Received 5 178 Biaxin OS 250mg 4/10 Abbott	
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		DAL ALL
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		•
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	Tech. Assigned Tech. Code Description Instructions	Date Closed Status 🔺
	> DISB5 Invalid/Incomplete signature Invalid/Incomplete signature	. Pract
	Name invalid: On attached E	SR dra
	Addr. Invalid: On attached ES	
		<u>F</u>
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10		Item: 1 of 3
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Figure 58 Result of adding a tech-assigned reject code and Tech Comments

# **Clearing a Reject Code**

If a reject code was added in error either by the system or by Sample management you have the ability to clear the reject code before creating the rejection letter.

#### Clearing a reject

code

To clear a reject code, use the following procedure:

Step	Action
1	In the Rejections applet, select the reject code you want to clear.
2	Select the Clear button.
	The Rejections applet will show that the reject code has been cleared.



## Releasing a Lock on a Record

Sample Management is responsible for supporting the PPD sales forces in all compliance related tasks. Each individual in Sample Management may support a salesforce, a region(s) or a group of territories, salesforces or regions. It will be each individual's responsibility to ensure that those territories, salesforces, or region's sample disbursement errors are corrected in a timely manner. To carry out this responsibility, you need to understand the "lock" feature in MAX and how to release it.

As you identify the professionals, call addresses and disbursements that you are responsible for and begin to work on them by assigning or un-assigning reject codes, MAX "locks" the record for you. This ensures that no one else in Sample Management will duplicate your work or efforts. If someone else attempts to edit your records, he/she will receive an error message alerting him/her that the record is yours and is "locked" by you.

If you need to relinquish the responsibility for the follow up of a record that is "locked" by you, you can do so by clicking on the Release Lock button. This feature could be beneficial when you are going on vacation and in your absence you are expecting follow up information from the sales representative to Close a record. By releasing the lock on the record, you allow someone else to close that record or follow up on it in your absence.

# Releasing a lock

on a record

To release the lock on a record, use the following procedure:

Step	Action
1	In the Sample Signature applet, select the record you want to unlock.
2	Click the Release Lock button.



- um	- Disbursement Follow-up
1	s Go Query Reports Help
	( ( → )) $\bigcirc$ $\bigcirc$ $\bigcirc$ $2↓$ $\stackrel{?}{\downarrow}$ $\stackrel{?}{\downarrow}$ $\stackrel{?}{\downarrow}$ $\stackrel{?}{\models}$
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]0 ∢→ Ω;	
	Samples Administration Sample Management
Disbursements & Follow-Ups	Sample Signature Letter Sen Release Lock Close
Signatures with Details	Print Count Reject Codes - Syst Current First Na Covert Least Hame Current Middle N Disb. First Na Disb. Last Nar Disb. Middle Dec  Cruz Tom Cruise MD
Address Review	V 1 Tina Quentin Tina Quentin MD
Professional	V 3 Michael Quinn P Michael Quinn P MD
Review	
	Signature Receipt Recreated
	Distributor: Abbott Abbott Signature Capture
	Qty Sample Manufacturer Lot Number 🛛 Tom Cruise MD 1004 E SUMNER STreet, HARTFORD, WI 53027 License #
	Ship/Received W170089 8 804 Micardis 80MG Abbott 804M Received
	Van August
	I REQUESTED AND RECEIVED THE RX ITEMS INDICATED FOR THE MEDICAL
	NEEDS OF MY PATIENTS. I CERTIFY THAT I AM CURRENTLY LICENSED WITH THE APPROPRIATE STATE AUTHORITIES AND AUTHORIZED TO REQUEST
	Rejections New Clear
	System Assigned System Code Description Tech. Assigned Tech. Code Description Instructions Ted
	gottawannamax 1 of 1
	Item: 3 of 5

Figure 59 The Release Lock button



## Marking Disbursements for Printing

When you have finished reviewing the sample disbursements in the Disbursements and Follow Up view, you are ready to generate rejection letters that will be sent to the sales representatives.

Marking disbursements for printing

To mark a disbursement for printing, use the following procedure:

Step	Action
1	Click in the Print column by the first record that is ready for printing.
	A checkmark will appear in the Print column.
2	Continue until you have marked all the records that are ready for printing.

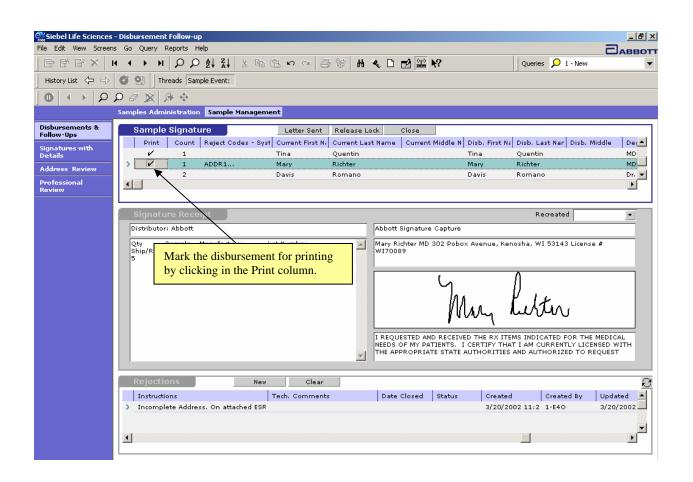


Figure 60: Marking a receipt for printing



# **Printing Rejection Letters**

# Printing

rejection letters T

To print rejection letters, use the following procedure:

Step	Action
1	Use the Pre-Defined Query bar to select the "Marked for
	Printing" query.
2	The records will be displayed in the Sample Signature applet.
3	Select Rejection Letters from the Reports menu.

Siebel Life Scien	ces - Disbursement F	- Follow-up		
<u>F</u> ile <u>E</u> dit ⊻iew <u>S</u>	<u>C</u> creens <u>G</u> o <u>Q</u> uery	<u>Reports</u> <u>H</u> elp		
│ ĒF ĒK B° × │ ₩	QQ H + P	Receipts - <u>M</u> ultiple Per Page	D 🖬 🔛 🐶	Queries 🔎 6 - Marked for Printir 💌
History List 💠 🖨	🛛 🕙 🔮 🗍 Threads	Receipt - <u>O</u> ne Per Page Receipt - <u>C</u> urrent Selected Only		
0 ( → Ø )	O 🖉 🙊 🤌 👘	Rejection Letters		
Disbursements	Samples Administr Sample Signa	Samples in Non-Sampling States Reps with >= 5 recreated calls Disbursement Records in 'Letter Sent' Status	sk Close	
& Follow-Ups	Print Cour		Current Last Name	Current Middle Narr Disb. First 🛋
Signatures with Details	6	Rock	Stone	*b6 —
	> 5	Mud	ААААА	Mud 🚽
Address Review	•			

**Figure 61: Printing Rejection Letters** 

Step	Action
4	The letters will appear in the Siebel Report Viewer.
	Note that each letter contains the following information:
	<ul> <li>Sales Representative's current name (first and last)</li> </ul>
	<ul> <li>Sales representative's current territory number</li> </ul>
	<ul> <li>Sales representative's employee ID</li> </ul>
	Call date
	<ul> <li>Sample reference number</li> </ul>
	<ul> <li>Professional's full name</li> </ul>
	<ul> <li>Professional's call address</li> </ul>
	<ul> <li>Copy of the sample receipt</li> </ul>
	<ul> <li>Instructions for corrections</li> </ul>
	<ul> <li>Date the letter was printed</li> </ul>



🎇 Siebel Re	eport Viewer				-	
		1 福 🛛	100 % 🝷 🦹			
						ភ
	Sample Managem	ent Reject Lett	er	Abbo North	ott Laboratories Inc. Chicago, IL 60064	
	Territory # <u>42670</u>	Call	Date: <u>03/18/2002</u>	Reference # ce	GT606X:9ZUZC	
	Rep Name: <u>ADAM MONITO</u>	<u>R</u>		Employee # 410	<u>D02670</u>	
	The attached Electronic Sar indicated below. It is impor Sample Management, D363 7606. Failure to return the o W. Adler	tant that you corre , 200 Abbott Park Re	ct this receipt and oad, J35, Abbott Pa : Sample Receipt (	l return it to Abbott ark, IL 60064-6181, I ESR) may lead to re	t Laboratories, attn: Phone: 1-800-535-	
	Distributor: Abbott1	r sait creek bi, hin	Abbott Signat			-
	Qty 🗆 Sample EManufacturer 🗆 Lot M EMavik Tablets 🗆 Abbott 🗆 00009794			reek Ln, Hinsdale, IL 605	521 License # 545454	
				W. M		
			UAT TEST SCRIPT ( 03/18/2002 13:18:03	054 PPD HOME OFFICE	E ADM DISCLAIMER	
						-
Demonstration of the second	ete - 1 page(s)				 Page: 1 of 1	

Figure 62: Print Preview of rejection letter

Step	Action
5	Use the navigation buttons in the toolbar to review the
	report.
6	To print a letter, click the Print icon in the toolbar.



# Changing the Process Status to "Letter Sent"

When you print a rejection letter, you must manually change the Process Status of the record to Letter Sent. In the same way, you will need to manually change the Process Status to Closed once the sales representative corrects the errors.

#### Changing the Process Status to Letter Sent

To change the Process Status to Letter Sent, use the following procedure:

Step	Action
1	Locate and select the record for which a letter has been sent.
2	Click the Letter Sent button.
3	The Process Status field will display "Letter Sent."
	Note that we have scrolled to the right to display the Process Status field.

Siebel Life Sciences	Disbursement Follow-up		_ 8 ×
File Edit View Screen:	Go Query Reports Help		
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History List 🗢 🔿	🚳 🐏 Threads Sample Event:	change the status o	*
		Letter Sent by click Letter Sent button.	king on the
	Samples Administration Sample Management	Letter Sent Button.	
Disbursements & Follow-Ups	Sample Signature		]
Signatures with	Prof. Type Changed Process Last Updated Process Status Process Close Date	Call Created By	Disclaimer Text 📃
Details	3/20/2003 6:55:01 PM	ROGERKE	I REQUESTED AND R
Address Review	> 3/20/2003 6:55:18 PM Letter Sent	HAYNEAA	I certify that I am cu
	3/7/2003 12:00:00 AM New	HAYNEAA	I certify that I am c 🔻
Professional Review	<b>Ⅰ</b>		Þ

Figure 63: Change the Status of a receipt to "Letter Sent"

You can view all the rejection letters you've sent by selecting the Letter Sent PDQ.



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File Edit View Screen:	IS GO Query Reports Help IN	
	Samples Administration Sample Management	
Disbursements & Follow-Ups Signatures with Details Address Review Professional Review	Sample Signature         Letter Sent         Release Lock         Close           Print         Count         Reject Codes - Syst         Current First Ni         Current Last Name         Current Middle N         Disb. First Ni         Disb. Last Nar         Disb. Middle         Dec           1         DISBURSEMENT2         David         Messer         Dr.         1         ADDR1         Mary         Richter         MD           >         1         ADDR2         Mary         Richter         Mary         Richter         MD	
	Signature Receipt         Recreated           Distributor: Abbott         Abbott Signature Capture	
	Qty       Sample       Manufacturer       Lot Number         Ship/Received       6       804 Micardis 80MG Abbott       804M       Received         6       804 Micardis 80MG Abbott       804M       Received       Image: Comparison of the state of the s	
	Patientine	
	Rejections         New         Clear           Instructions         Tech. Comments         Date Closed         Status         Created         Created By         Updated	
	> Incomplete Address. On attached ESR         3/21/2002 3:25 1-E4O         3/21/2002	
		•

#### Figure 64: Letter Sent Query

## **Closing a Record**

After the sales representative has made the appropriate corrections, you can close the record for that disbursement.

# Changing the

process status to Closed

To change the process status to Closed, use the following procedure:

Step	Action
1	Locate and select the record that is ready to be closed.
2	Click the Closed button.
3	The Process Status field will display "Closed." (See Figure 65.) Note that we have scrolled to the right to display the Process Status field.



History List ← ⇒	GO Query Reports Help       I I P P 2↓ 2↓ ↓       I I Preads Sample Event:       P P ↓		change	e close button to the Process Closed The	es 🔎 1 - New
	Samples Administration Sample Managem	ent	•		
Disbursements & Follow-Ups	Sample Signature	Letter Sent Relea	ase Lock Close		
-	Prof. Type Changed Process Last Upo	ated Process Status	Process Close Date	Call Created By	Disclaimer Text 📃
Signatures with Details	6/6/2002 10:20:	11 AM New		HUBBAJH	UAT test
	3/12/2002 9:47:	39 AM New		HUBBAJH	UAT tests disclaimer
Address Review	> 3/20/2003 7:17:	46 PM Closed	3/20/2003 7:17:46 PM	НИВВАЈН	Who are responsible 🔻
Professional Review	<b>I</b>				

Figure 65 The result of clicking the Close button

You can view the closed record by selecting the Closed PDQ.

Note: In order to expedite the opening of all your queries you should always refine them for the salesforces or regions that you are responsible for and then save them as such.

Siehel Life Sciences	Disbursement Follow-up	×
File Edit View Screen:	Go Query Reports Help       Select the Closed PDQ to display all records with a process status of Closed.         Image: Sample Ever       Select the Closed PDQ to display all records with a process status of Closed.	_
] <b>0</b>   ← →   ₽.		
Disbursements &	Samples Administration Sample Management Sample Signature Letter Sent Release Lock Close	
Follow-Ups Signatures with Details Address Review Professional Review	Call Status     Emp #     Territory     Validation Required     Prof. Type Changed     Process Last Updated     Process Status     Prof.       Synchronized     4100-0072     64204     6/25/2002 2:35:40 PM     Closed     7/1       Synchronized     4100-0072     64204     7/1/2002 3:37:43 PM     Closed     7/1       Submitted     4100-0072     64204     7/1/2002 3:37:43 PM     Closed     7/1	
	Signature Receipt Recreated 🔹	
	Distributor: Abbott     Abbott Signature Capture       Qty     Sample       Ship/Received     Io6 Prevacid 30MG Abbott       6     105 Prevacid 15MG Abbott       PK12345 Received	
	I REQUESTED AND RECEIVED THE RX ITEMS INDICATED FOR THE MEDICAL NEEDS OF MY PATIENTS, I CERTIFY THAT I AM CURRENTLY LICENSED WITH THE APPROPRIATE STATE AUTHORIZED TO REQUEST	
		I
	Rejections         New         Clear           Instructions         Tech. Comments         Date Closed         Status         Created By         Updated	
	×	



#### Figure 66: Closing a completed record

#### **Hands-On Practice**

Display all the letters for Territory 00001 for which rejection letters have been mailed to the sales representatives.

Close the first record.

Scroll to the right to be sure the Process Status field contains Closed.



#### Hands-On Solution

- 1. Select "3-Letter Sent" from the Pre-Defined Query bar.
- 2. Click the New Query button in the lower toolbar.
- 3. Scroll to the right to display the Territory field.
- 4. Click in the Territory field and type "00001."
- 5. Press Enter or click the Execute Query button.

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	Samples Administration Sample Management		
Disbursements & Follow-Ups	Sample Signature Letter Sent Release	E Lock Close	
Signatures with Details	Signature Timi Recreated Receipt Requested Call Status 9:41 AM Submitted	Emp # Territory 41000001 00001	Validation Required   Prof. Type Chanc
	11:09 AM Submitted	41000001 00001	
Address Review	7:39 AM Submitted	41000001 00001	V V 🗸
Professional Review			
	Signature Receipt		Recreated
	Distributor: Abbott	Abbott Signature Capture	
	Qty Sample Manufacturer Lot Number Ship/Received 2 876 Omnicef 125mg OS 2/5 Abbott	Jessica Albright MD 1540 Roselle R JA64382	d, Schaumburg, IL 60193 License #
	000012017 Received 875 Omnicef 300mg 4/2 Abbott 000012015 Received	Alb	e1(.HT
		to request and receive the Rx drug	d with the appropriate state authorities samples indicated which I request for I acknowledge receipt of those items
	Rejections New Clear		e
	Tech. Assigned Tech. Code Description Instructions	Tech. Comment	
	> Name invalid:	On attached ESR dra	· · · · ·
			<b>.</b>
	•		
		gottawannam	ax 1 of 1
Abbott - Historical Territory		Item	1 of 92

# Figure 67 Result of using Letter Sent PDQ and dynamic query to display disbursement records for Territory 00001

- 6. Select the first record and then click the Close button.
- 7. Scroll to the right to confirm that the Process Status field displays "Closed."



## Printing Reports from the Sample Management View

The MAX system provides you the ability to create reports to be used as follow up or as required in your BOPs. You will want to print and retain the reports to document your work as needed.

To view the reports available to you, select the Reports menu. This menu includes the following reports, which you can view in the Siebel Report Viewer. Each screen, Samples Administration and Sample Management will have its own set of reports.

### Samples in Non-Sampling States

The Nucleus Pharma Ops Scrub process verifies all sampling professionals to make sure that their state license is valid in the state where they practice. This process prevents sales representatives from creating a sample disbursement call to a professional whose state license may be revoked, by setting the sampling status to Inactive. This process is also used for verifying Physician Assistants and Nurse Practitioners in the states where they practice. Nucleus Pharma will set the sampling status to Inactive in MAX for Nurse Practitioners (NP) or Physician Assistants (PA) in the states where it is not allowed to distribute drug samples to them. If the sampling status is Inactive or Pending, MAX will prevent the sales representative from creating a sample disbursement to that professional.

Sales representatives will have the ability to add a "new" professional into their MAX database and MAX allows all "new" professionals to be sampled once prior to the verification process. Therefore, the sales representative may create a new NP or PA professional profile and distribute samples in a state where it is not allowed. In order to find those professionals (NPs or PAs) who have been sampled in error, a report has been created for you. The report is titled Samples in Non-Sampling States. See Figure 68, which displays a copy of the report. If a sales representative has created a "one time sample" to a NP or PA in a state where distributing drug samples to them is not allowed per Abbott's standards, a reject code will be added to the sample disbursement record automatically by the system. This information along with information about the sales representative and professional will appear in this report for further follow up by Sample Management. This report can be found in the Sample Management screen in the Disbursements and Follow-Up view.



													11
Samp	les in Non-Sam	pling	States							i		bott Laboratories Inc. rth Chicago, IL 80084	- 11
Employee	Territory # C	all Date	Last Na	me Fir	st Name	Call Address		City	State	Zip	Degree	Reference #	- 61
41000001 Tech. Assign		1/05/2002	Albright System Assi		ssica NP	1540 Roselle I	Rd Comments	Schaumburg NP	IL	60193	NP	ceH54EYT:9ZPTD	- 11
Tech. Assig	ned		System Assi	gned	NP		Comments	NP					- 81
Tech. Assig	ned		System Assi	gned	NP		Comments	NP					- 84
Tech. Assig	ned		System Assi	gned	NP		Comments	NP					- 81
													- 12

Figure 68 Samples in Non-Sampling States report

#### Reps with >5 Recreated Calls

Sales representatives create many sample disbursement calls in a day, in that process of making sample disbursement calls, disbursement errors will occur. In most cases the errors can be easily corrected using the rejection letter process. Other errors may consist of the representative having the wrong doctor sign for samples or an error made impacting their inventory in Omega, i.e., having the professional sign for the wrong product or quantity. These types of errors must be corrected by using the Recreate process.

This report was created to track when sales representatives create more than five Recreate calls in one month. It gives Sample Management the ability to easily review this report and escalate issues if needed. It also supplies room on the report for Sample Management to follow up with the sales representative to find out the reason for the Recreated calls and document the reason. This information helps to determine if further training is needed for the individual representative or as a guide for future training.

This report can be found in the Sample Management screen in the Disbursements and Follow-Up view.

#### Aging Report for "Letter Sent"

As sample disbursement records are rejected and letters are sent to the sales representatives, it is Sample Management's responsibility to ensure that the errors are corrected in a timely manner. In order to facilitate this process the Aging Report for "Letter Sent" was created. This report will systematically age the sample disbursement record from the day that the disbursement's



status is changed to "Letter Sent." Sample Management has determined that an escalation process is needed for errors that exceed sixty days and have not been corrected. The escalation process is defined in **BOP.V-03500710**.

This report will age the disbursement records and break them out into the following categories:

- A. More than 180 Days
- B. Between 68 and 179 Days
- C. Between 38 and 67 Days
- D. Between 31 and 37 Days
- E. Less than 31 Days

This report can be found in the Sample Management screen in the Disbursements and Follow-Up view.

#### Multi One-Time Sampling by Prof / Rep

As stated in the Samples in Non-Sampling States report, the Nucleus Pharma Ops Scrub process verifies all professionals to make sure that their state license number is valid in the state(s) that they practice. This process prevents sales representatives from creating a sample disbursement call to a professional whose state license may be revoked by verifying the state license number and setting the sampling status to Inactive.

Sales representatives will have the ability to add a "new" professional into their MAX database and MAX allows all "new" professionals the ability to be sampled once prior to the verification process. If a sales representative attempts to by-pass the verification process or inadvertently recreates a duplicate professional of one whose sampling status is currently Pending or Inactive, the sales representative along with the name of the professional will appear on this report. Sample Management will review this report weekly and take appropriate action. This report can be found in the Samples Administration screen, in the Signature Printing view.



# Module 8: Samples Administration

The Samples Administration screen contains three different views:

- Samples History
- Signature Printing
- Historical Signature Data

## **Samples History**

When you click on the Sample Administration screen tab, the Samples History view will be displayed. You can query the view by any of the fields that are available in the list applet. You can also create and save your own PDQs for future use in this view. As in other views, if you click and highlight a record in the list applet, that information will be viewable in the form applet below in an easier to view format.

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History List 🗇 =	0 6	R Threads Sample	s History;					
		ples Administration	Sample Ma	nagement				
amples listory		Samples History		,				
lignature		Sample		Lot #	Expiration Date	Quantity Item S	tatus Transaction #	-
rinting	>	114 Prevacid 30mg	1/7	806132E	06/01/2004	100 Submit	ted 7-5T	-
listorical		105 Prevacid 15mg	1/30	817852E	08/01/2004	100 Submit	ted 7-67	
ignature Data		114 Prevacid 30mg			C 11.1		ted 7-6G	
		105 Prevacid 15mg			nformation will be	displayed in mit	ted 7-6N	
		114 Prevacid 30mg	the fo	orm below.		mit	ted 7-7E	
		600 Mavik 1MG	4/ 1	000091997	00/04/2002	oo ooomit	ted 8-109	
		159 TriCor 160MG	1/7	795272E	09/01/2003	S0 Submit	ted 8-131	
		600 Mavik 1MG	1/7	000097997	06/01/2002	10 Submit	ted 8-18H	
		159 TriCor 160MG	1/7	795272E	09/01/2003	20 Submit	ted 8-180	
		600 Mavik 1MG	1/7	000097997	06/01/2002	15 Submit	ted 8-1EL	
		114 Prevacid 30mg	1/7	806132E	06/01/2004	50 Submit	ted ceGQ3IA1:31VLR	0
		114 Prevacid 30mg	1/7	806132E	06/01/2004	50 Submit	ted ceGQ3MO3:1DY4	QC
		105 Prevacid 15mg	1/30	817852E	08/01/2004	20 Submit	ted ceGQ3P8F:13YJ9	R
	and the second second							E

Figure 69: Samples History view



# **Reviewing a Sample History Report**

If you have used a query to filter the sample history view, you can create a report for that information in the Siebel Report Viewer.

Using the Siebel Report Viewer

To use the Siebel Report Viewer, use the following procedure:

Step	Action
1	From the Reports menu, select Sample History.
	The Siebel Report Viewer opens.
2	Use the navigation bar at the top of the screen to review the
	report.
3	If desired, click the <b>Print</b> button to print a report.

S	ample History							aboratories Inc.
No.	Sample	Lot #	Expiration Date	Oty Item Status	Txn # Txn Date	Txn Type Status Other Rep	Doctor Name	
1	177 Biaxin OS 125mg 4/10	100012177	1/1/2005	2 Submitted	ceH6QEW12/06/2002 W:2RVXY 22:24:32 5	Disbursement Submitted	Charlotte Bronte	00001
2	178 Biaxin OS 250mg 4/10	100012178	1/1/2005	2 Submitted	ceH6QEW12/06/2002 W:2RVXY 22:24:32 5	Disbursement Submitted	Charlotte Bronte	00001
3	106 Prevacid 30mg 1/30	000012004	12/31/2004	4 Submitted	ceH6QF1 12/06/2002 J:9ZRPH 22:27:19	Disbursement Submitted	Brad Maynard	00001
4	178 Biaxin OS 250mg 4/10	100012178	1/1/2005	4 Submitted	ceH6QF1 12/06/2002 J:9ZRPH 22:27:19	Disbursement Submitted	Brad Maynard	00001
5	105 Prevacid 15mg 1/30	000012001	12/31/2004	2 Submitted	ceH6PCK 12/06/2002 N:2HWG408:36:23 0	Disbursement Submitted	James Thompson	00001
6	106 Prevacid 30mg 1/30	000012004	12/31/2004	4 Submitted	ceH6PCK 12/06/2002 N:2HW/G408:36:23 0	Disbursement Submitted	James Thompson	00001
7	106 Prevacid 30mg 1/30	000012004	12/31/2004	4 Submitted	ceH6PE4212/06/2002 :1NXNYK 09:09:38	Disbursement Submitted	Maria Vasquez	00001
8	178 Biaxin OS 250mg 4/10	100012178	1/1/2005	4 Submitted	ceH6PE4212/06/2002 :1NXNYK 09:09:38	Disbursement Submitted	Maria Vasquez	00001
9	875 Omnicef 300mg 4/2	000012015	12/31/2004	4 Submitted	ceH6PJ9 12/06/2002 W:1NXNY 11:01:09 L	Disbursement Submitted	Jessica Abright	00001
10	876 Omnicef 125mg OS 2/5	000012017	12/31/2004	2 Submitted	ceH6PJ9 12/06/2002 W:1NXNY 11:01:09 L	Disbursement Submitted	Jessica Abright	00001
11	510 Synthroid 50mg 1/28	000012013	12/31/2004	2 Submitted	ceH6PL1 12/06/2002 W:27WU 11:39:32 Q2	Disbursement Submitted	Alicia Allen	00001
12	106 Prevacid 30mg 1/30	000012003	12/31/2004	4 Submitted	ceH6PLF212/06/2002 :6Z2 11:47:26	Disbursement Submitted	Melanie Peterson	00001
13	178 Biaxin OS 250mg 4/10	100012178	1/1/2005	4 Submitted	ceH6PLF212/06/2002 :6Z2 11:47:26	Disbursement Submitted	Melanie Peterson	00001
14	177 Biaxin OS 125mg 4/10	100012177	1/1/2005	2 Submitted	ceH6PO3 12/06/2002 2:2HWG3 12:45:02 T	Disbursement Submitted	Liming Chang	00001
15	178 Biaxin OS 250mg	100012178	1/1/2005	2 Submitted	ceH6PO3 12/06/2002	Disbursement Submitted	Liming Chang	00001

#### Figure 70 Sample History displayed in the Siebel Report Viewer



## **Exporting a Report to Excel**

You can also export the Sample History report to an Excel spreadsheet, where you can perform more detailed analysis of the data.

# Exporting a report to Excel

To export a report to Excel, use the following procedure:

Step	Action
1	Use a query to display the sample history information you want to export.
2	Select <b>Export</b> from the File menu.

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Export		Biaxii OS 125mg	4/10	100012177	-	1/1/2005		2	Submitted	ceH6QEWW:2RVXY	12/6/2002
Coppert		Bi kin OS 250mg	4/10	100012178		1/1/2005		2	Submitted	ceH6QEWW:2RVXY	12/6/2002
Change Password		Prevacid 30mg	1/30	000012004		12/31/2004		4	Submitted	ceH6QF1J:9ZRPH	12/6/2002
change rassworu		Biaxin OS 250mg	4/10	100012178		1/1/2005		4	Submitted	ceH6QF1J:9ZRPH	12/6/2002
Exit		Prevacid 15mg	1/30	000012001		12/31/2004		2	Submitted	ceH6PCKN:2HWG40	12/6/2002
		Prevacid 30mg	1/30	000012004		12/31/2004			Submitted	ceH6PCKN:2HWG4(	

Figure 71 Starting the export of data

Step	Action
3	Complete the Export dialog box and click <b>OK</b> .

		ott Laboratories rmaceutical Product	s Division	Operating Procedure Effect	Number: I ive Date:	3PM-	
(	Siebel Life Sciences → The Edit View Sciences Free Part Alexandrian History List (> →) History List (> →)	Go     Query     Reports     Help       ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓       ⑤     🐏     ↓     ↓     ↓     ↓     ↓     ↓     ↓       ⑤     ♠     ↓     ↓     ↓     ↓     ↓     ↓     ↓       ●     ∅     ♠     ↓     ↓     ↓     ↓     ↓     ↓       ●     ∅     ∅     ↓     ↓     ↓     ↓     ↓		5 6 H < D M .	?	Queries 🔎 Lots Witho	_ 🗗 ut Samples□□ 💌
	Samples History Signature Printing Historical Signature Data	Samples History Sample 177 Biaxin OS 125mg 178 Biaxin OS 250mg 106 Prevaid 30mg 105 Prevaid 30mg 106 Prevaid 30mg 106 Prevaid 30mg 178 Biaxin OS 250mg 875 Omnicef 300ng 875 Omnicef 300ng 178 Biaxin OS 250mg 178 Biaxin OS 250mg 510 Synthroid 50mg 178 Biaxin OS 250mg 510 Synthroid 50mg	Amount to export  Amount to export  Conly current row  All rows in current query  Output format  Tab delimited text file  Output file  File name:  C:\sea630\client\temp\output  And open	CSV (comma separated value)     Other delimiter:	inse im Stat bmitter	ceH6QEWW:2RVXY ceH6QEWW:2RVXY ceH6QFJJ:9ZRPH ceH6QFJJ:9ZRPH ceH6PCKN:2HWG4C ceH6PCKN:2HWG4C ceH6PE42:1NXNYK ceH6PJ9W:1NXNYL ceH6PJ9W:1NXNYL ceH6PJ9W:1NXNYL ceH6PJ9W:27WUQ ceH6PLF2:622 ceH6PLF2:622 ceH6PLF2:622 ceH6PC32:2HWG3" ceH6PPR:2RW1HI ceH6PCR:2RW1HI	12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 { 12/6/2002 { 12/6/2002 { 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 : 12/6/2002 :
			77  T	saction Date 12/6/2002 10:24 ransaction # ceH6QEWW:2RVXY5 saction Type Disbursement action Status Submitted	_	By HAYNEAA	

Figure 72 Completing the Export dialog box

Step	Action
4	Open Excel.
5	Select <b>Open</b> from the Excel File menu.



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16	<u>3</u> Data flow analysis.xls											
17	4 J:\AREA\\TRAINING FRAMEWORK.xls	5										
18	Exit											

Figure 73 Beginning to import a report into Excel

Step	Action
6	In the Open dialog box, navigate to the location of the file you exported from MAX.
	exported from MAA.



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Figure 74 Opening a .csv file in Excel

Step	Action
6	Click Open. The report will open in Excel.
7	Adjust the columns as needed.
8	In Excel, select File, Save As and save the file.

M	licrosoft Ex	cel - output	.csv												_	. 8 ×
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3	178 Biaxir	1E+08	1/1/2005	2	Suhmitted	ceH6QEW	#########	Dishursem	Submitted			Bronte	Charlotte	HAYNEAA		
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6	105 Preva	12001	*****	to	display e	entire ex	piration	date.				Thompson	James	HAYNEAA		
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8	106 Preva	12004	#######################################	4	Sammaea	CENOFIL42		DISDUISEIT	Submittee			Vasquez	Maria	HAYNEAA		
9	178 Biaxir	1E+08	1/1/2005	4	Submitted	ceH6PE42	#########	Disbursem	Submitted			Vasquez	Maria	HAYNEAA		
10	875 Omnio	12015	###########	4	Submitted	ceH6PJ9W	#########	Disbursem	Submitted			Albright	Jessica	HAYNEAA		
11	876 Omnio	12017	###########	2	Submitted	ceH6PJ9V	#########	Disbursem	Submitted			Albright	Jessica	HAYNEAA		
12	510 Synth	12013	##########	2	Submitted	ceH6PL1V	##########	Disbursem	Submitted			Allen	Alicia	HAYNEAA		

Figure 75 Report has been imported into Excel



# Using Hyperlinks to "Drill Down" to Disbursement Details

By now, you probably realize that MAX offers you many ways to filter data and navigate between different views of the data. To complete your introduction to MAX, let's look at the way MAX uses hyperlinks to allow you to "drill down" from a high-level list to the details of the record.

To see this drill down feature, let's take a look at the Signature Printing view.

File Edit View Screen:	s Go Query	Reports Help						2	Эдвво
History List ↔ ↔	<b>G</b> Wh	perlinks appear en you pass you is to a pointing	ur mouse ov			≗ <b>\</b> ?	Queries	🔎 0 - Marked for Pr	
	Sam <del>ples Au</del>	minisuadon sampi	e nanagement						
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	aamp	ie olghuture – j	•						
Signature Printing	Print	Codes	Reference #	Emp #	Rep's First Name	Rep's Last Name	First Name	Last Name	Mi
Signature Printing Historical Signature				Emp # 4100-0091	Rep's First Name Joseph	Rep's Last Name Wendel	First Name	Last Name	Mi_
Signature Printing Historical Signature	Print	Codes	ceHOUKXJ:1DY				First Name	Last Name	Mi
Signature Printing Historical Signature	Print	Codes SA - INCORRECT	ceHOUKXJ:1DY ceHOUL16:3VL	4100-0091	Joseph	Wendel	First Name Allen		Mi
Signature Printing Historical Signature Data	Print V V	Codes SA - INCORRECT SA - INCORRECT SA - INCONSISTE	ceHOUKXJ:1DY ceHOUL16:3VL ceGTJEX1:13YI	4100-0091 4100-0091	Joseph Joseph	Wendel Wendel			Mi - A
Signature Printing Historical Signature	Print V V	Codes SA - INCORRECT SA - INCORRECT SA - INCONSISTE	ceHOUKXJ:1DY ceHOUL16:3VL ceGTJEX1:13YI	4100-0091 4100-0091 4100-0072	Joseph Joseph Michelle	Wendel Wendel Rock	Allen	Aaron	•
Signature Printing Historical Signature Data	Print V V	Codes SA - INCORRECT SA - INCORRECT SA - INCONSISTE	ceHOUKXJ:1DY ceHOUL16:3VL ceGTJEX1:13YI	4100-0091 4100-0091 4100-0072 4100-0091	Joseph Joseph Michelle Joseph	Wendel Wendel Rock Wendel	Allen Abbott	Aaron Abbott	•

Figure 76 Hyperlinks displayed in MAX

To see more details about any of the records shown in the Sample Signature list applet, click the hyperlink in the Reference # field. The hyperlink will take you to the Disbursements & Follow-Up view of the record.



Siebel Life Science:	s - Disbursement Follow-up
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	Samples Administration Sample Management
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Address Review	-
Professional Review	
	Signature Receipt Recreated •
	Distributor: Abbott Abbott Signature Capture
	Qty Sample Manufacturer Lot Number Ship/Received 5 153 Tricor 67MG Abbott 460453T Received
	I certify that I am currently licensed with the appropriate state authorities to request and receive the Rx drug samples indicated which I request for the medical needs of my patients. I acknowledge receipt of those items
	Rejections New Clear
	Rejections     New     Clear       System Assigned     System Code Description     Tech. Code Description     Instructions     Tech. Com       >     QTY1     Incorrect Quantity     Incorrect quantity. On attached ESR d
	<b>↓</b>

Figure 77 Result of selecting a hyperlink in the Signature Printing view



# Appendix A: Reject Codes

A list of the reject codes appears on the next two pages.



Syntem Annigned N	Tech Anigned Y	Tripe Relation course	D(IIPI3), V3IU8 ULEMIK	Detect/ption (MIN 1 Char MAX 50 Chart) SI2e Cleared	<ul> <li>Order Inituction for Letter (MAXIMUM 255 Charateri)</li> <li>1</li> </ul>
~	>		NAME1	h comp kite Nam e	Incompte Name. On attacted ESR daw a single line through the hoor rect h formation, a condition connect information beside it, sign, date and write an explanation for the change. Update your laphop. Retrin ESR to Sample Management 15 2
> >	> >	RELECTION CODES	400R1 2	in complete Name In complete Address	15 2 Incomplete Address. On attached ESR draw a single line through the incorrectintom attor, record the correct information bestle it, sign, dark and write an explanation for the change. Rethin ESR to 18 2 Sampe Management.
٨	7	RELECTON CODES	ADDR2	h comp ête. Addre ss	5
٨	٨	RELECTON CODES	ADDR3	homechhomplete Chy	Incorrect City. O i attached ESR draw a slige lite thiorigh the license of hom abol, record the correctinform abol beside if sign draw, write an explanation for the change. Rethin ESR to Sample 25 2 draw enert
۶	۶	RELECTION CODES	A00R4	licomechicomplete Zb Code	Incorrect/incomplete Zpi Code. On attacted ESR draw a single he through the incorrect hom and/on, record the correct in brom atbu- ble side it, sign, date and write an explanation for the change. Return ESR to Sample Management. 29 2 2
>	>	REJECTION CODES	1 BSD	० म त्वाधियरू	Caldate 1:45 days or more than or rent date. On attached ESR daw a slight lite through the incorrect information, record the correct in formation beside 1, sign, date and write an explanation for the clarge. Retrin ESR to Sample Management 13 2
٨	7	RELECTON CODES		h to re ctcall date	Incorrect calidate. Or attacted ESR draw a single life through the Incorrect hormation, accord the correct information beside fit sign, draw and write a explanation for the exitation ESR to 19 2 dam per Maradement.
>	>	RELECTION_CODES	EBSIO	homecttine recorded	Incorrect time is contract. On attacked ESR daw a single like thorigh the incorrect information, is conditie correctint or mation beside it, spin, darks and write an explanation for the clange. 23 2 Retint ESR to Sample All and ment. 29 2 Retint ESR to Sample All non-sampling state. Recomendant period in the spin explorement.
۶	٨	REI BOTTO N_CO DES	đ	Nicse Practitioner sam pikici in nor ⊀am piling state	ol rotum.correctampre quartores on anteoret ESK and rur sgus autobrate seach change. r/samples the courerable Rep writes "Samples Uniscoure table" on attached ESR and NP styris and tS fabres. PA sampled In tot+ sampling state. Reccurer samples and return
>	>	RELECTON CODES	A A	Physicial Assistantsampiks in 101-6ampilig State	<ul> <li>or RG M. Correctsample quartities or attacted ESR and PA signs and dates each change. If samples it in courtenble. Rep writes "samples Uniscoure table" or attacted ESR and PA signs and 49 15 dates.</li> </ul>
z	>	RELECTON CODES	8830	Name does lotmati pacifible (slotati e	If practitibuter without gued does not match the name on the attached ESR, draw a shigh the through the hoor recht horm arbon, record the correct horm arbon bestie fitshy, date and write an explanation to the clarge. Return ESR to Sample Management 42 S
¥	٨	RELECTON_CODES	PISI (	ante up s pil salt	Mussing styrathine. Fracettooiner mitstagiand date attached ESR. 11 Rethrin ESR to Sample Management.



Syntem Analgred	Tech Autgred	8. F	Display Value	Detertption (MIN 1 Char MAX 50 Chart) SI26	Drder O
					Explice for R. Reconcistant place and retrinion R.G. M. Confect sample quartities on attacted ESR and Pacifichier Signs and dates and solution. Mercure of surveys and approximate
>	>	RELECTION CODES	01587	Rep sampled an explicit dipt#	use searchange. In an pear an experience reprintee Sample: Une coure able on attached ESR and Practitibuer signs 15 and detski
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z	Å	RELECTION CODES	0585	In using/hom press of the signature	29 11 attacted ESR. Retrin ESR 10 Sample Management hoorsed introduction of attacted ESR draw as both the
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z	٨	REJECTION CODES	<u>ат</u> и1	h correctionantly.	Incorrect quantity. On article dESR draw a single line through the Incorrect quantity, record the correct quantity best be thand haue the Practitude sign and date each change.
z	٨	REJECTION CODES	07/2	уш, гар јаур воо	Incorrect product code and/or quarthy. On attached ESR draw a single line through the incorrect product code and/or quarthy, neor of the correct product code and/or quarthy best be thand have the Pracetor restrict and date each change.
z	Å	SIG N_REJECTION_CODES	SA - INCO MPLETE		11 ESR Retrin ESR to sample Management
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# Appendix B: Glossary

Applet: A data layout. MAX uses two types of data layout, lists and forms.

**Ellipses:** A symbol made up of three periods (...) In computer menus, used to indicate additional options are available. In MAX, used as the label for a button that opens a multi-valued grid (MVG).

Field: A piece of data that makes up a record.

**History bar:** A MAX toolbar used to re-trace a user's path through various views and screens.

List of Values (LOVs): The data values that make up a pick list.

**Multi-valued grid (MVG):** Used to display the multiple values contained in a field.

**Navigation shortcut:** Combinations of keystrokes that replace the use of a mouse to select an option from a menu or toolbar.

**Organization:** A sales force.

**"Pick list":** A list of values (LOVs) used to make data entry fast, consistent, and compliant with business rules. Usually displayed as a drop-down list.

**Position:** A territory.

**Pre-defined query (PDQ):** A commonly used query that the system admin creates and maintains for a view. PDQs are accessed from the Pre-Defined Query bar.

**Pre-Defined Query bar:** Contains a drop-down list of pre-defined queries created by the System Administrator or by users.

Record: A collection of fields that describe a single disbursement.

Screen: A collection of views that are all related to a common work area.

Screen bar: Lists available screens. Used to navigate between screens.

**View:** Collections of fields, usually organized around a common subject, such as professional name.

View bar: Lists available screens. Used to navigate between views.



# **Appendix C: Navigation Shortcuts**

	Laptop	PDA	Note
Function	Shortcut	Shortcut	
Add new record	CTRL + N	CTRL + N	
Insert new record	CTRL + I	CTRL + I	
Delete record	CTRL + D	CTRL + D	
Copy record	CTRL + B		
Cut	CTRL + X	CTRL + X	
Сору	CTRL + C	CTRL + C	
Paste	CTRL + V	CTRL + V	
Undo	CTRL + Z	CTRL + Z	
Redo	CTRL + Y	CTRL + Y	
Print	CTRL + P		
New query	CTRL + Q	CTRL + Q	
Refine query	CTRL + R	CTRL + R	
Save query as	CTRL + S		
Find	CTRL + F	CTRL + F	
Undo	CTRL + Z	CTRL + Z	
Execute query	ENTER	ENTER	
Clear		DELETE	
Next Record	Ctrl+Down	Ctrl+Down	Ctrl is not needed
First Record	Ctrl+Page Up	Alt+Ctrl+PgUp	Alt is needed on the PDA
Last Record	Ctrl+Page Dn	Alt+Ctrl+PgDn	Alt is needed on the PDA
Previous Record	Ctrl+Up	Ctrl+Up	Ctrl is not needed
New Correspondence	Ctrl+L		

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