SPS COMMERCE

INFINITE RETAIL POWER™

FULFILLMENT

McKESSON Med Surgical WebForms Reference Guide - **840 Series**

February 2016

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Introduction

Welcome to the **McKesson Med Surgical** **WebForms Reference Guide**. This reference material is intended to make your transition to the world of web business-to-business communication as smooth as possible. At the completion of this document, you will have a basic understanding of WebForms functions, capabilities, and the tools needed to begin using WebForms to access your EDI documents and begin trading with McKesson.

MCKESSON

As the oldest and largest health care services company in the nation, McKesson plays an integral role in health care and has a unique vision for its future. We serve more than 50% of American hospitals, 20% of physicians and 100% of health plans, and as the largest pharmaceutical distributor in North America, where they deliver one-third of all medications used there every day.

Their software, distribution and business services play an essential role in addressing the challenges health care organizations face today — and shaping how they'll overcome them tomorrow. They connect people and organizations, support the quest for higher quality and improved clinical outcomes, and help health care businesses run better. And that supports better patient health.

Today, McKesson is ranked in the top companies on the FORTUNE 500. The company delivers vital medicines, medical supplies and health care information technology solutions that touch the lives of patients in every health care setting. McKesson is committed to creating a health care system that leads to lower costs, fewer mistakes, higher quality and better health for all.

What is EDI?

EDI stands for *Electronic Data Interchange*. It allows you, the Supplier to electronically exchange documents like the Advanced Ship Notices and Invoices with your Trading Partner.

Using EDI streamlines the connection between you and your Trading Partners. It makes it easy to send and receive documents through one Web portal that operates like an email account. This will help keep all of your Orders organized and in one place. It also provides a great place for creating your own documents that need to be sent without having to fax or e-mail them. Documents are able to be both sent and received in a matter of minutes, and Orders become flexible in all formats: In-Store, Online, and Drop-Ship.

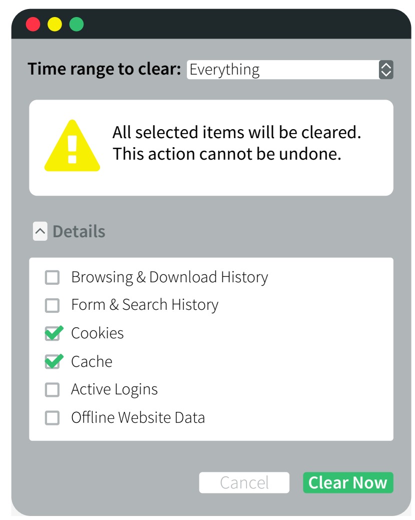
Java

Java is an application required for operating the WebForms account. You will want to ensure that the platform is downloaded, installed, and updated on your computer. How do you download Java?

Go to **www.java.com** and click on the red download button: **Free Java Download**
After installing Java, re-start your Browser.

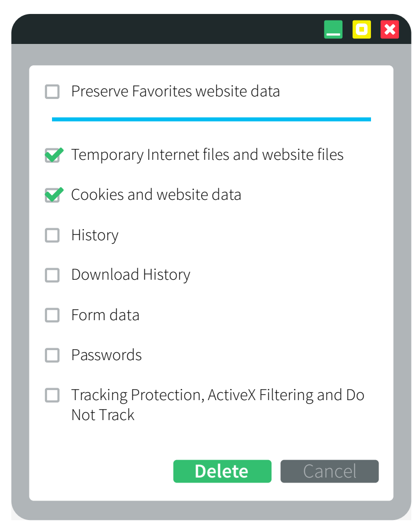
Do you have Java but your forms seem to be not loading? You may be having an issue related to an outdated version of Java or an overcrowded cache of temporary internet files. Please follow the below steps, close out of your browser, re-open and re-try after completion.

1. Clear temporary Internet Files



mozilla Firefox

1. Navigate to **Tools**
2. Select *Clear Recent History*
   Select only *Cookies* and *Cache* from the list
3. Click *Clear Now*



Internet Explorer

1. Navigate to **Tools**
2. Select *Internet Options*
3. Navigate to the *General* tab
4. Within *Browsing History*, click *Delete*
   Select only *Cookies* and *Cache* from the list

2. Verify Version of Java

Open your Java control panel:

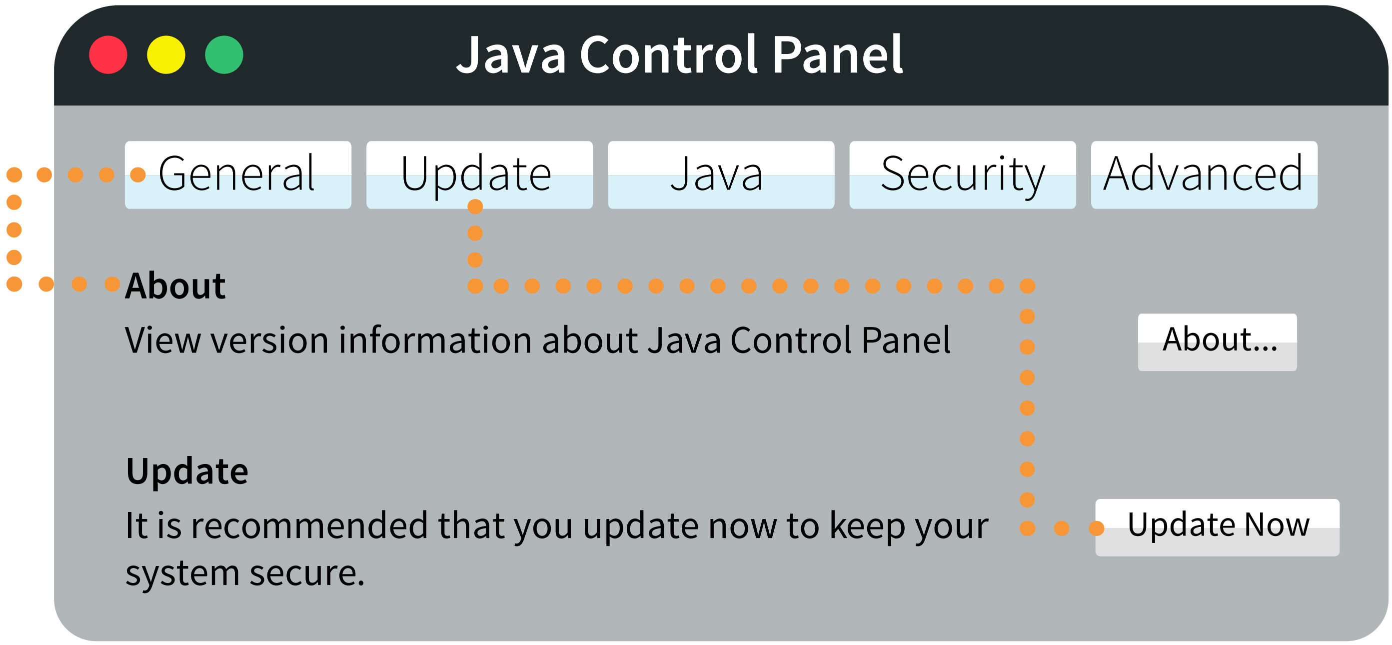
PC-users: Start menu > Control Panel > Programs > Java

Mac-users: Apple Start Menu > System Preferences > Java

a) Check for an updated Java version. (Update tab)

b) Verify that Java is up-to-date. (General tab)

If not, uninstall the existing version and download an updated one at www.java.com.



c) Verify that your system does not have more than one Java program installed.

Multiple Java programs can compete with each other.

3. Enable Java in your Internet Browser

1. In Mozilla Firefox, navigate to Tools > Add-ons > Search for Java and enable it.
2. In Internet Explorer,navigate to Tools > Manage Add-ons > Search to find Java and ensure that it is enabled.

For Java video training, visit our Support Center: Check and Update Java

To access your WebForms Fulfillment account:

1. Navigate to **www.spscommerce.net**
2. Enter your username and password (provided to your System Administrator by your dedicated Analyst)
3. Click **Login**

Login to Hosted Commere

Username

Password

Login

Need help logging in? Did you forget your username or forget your password?

Once logged in, you are brought to your **Portal Homepage**. This is your home for new product updates and general information regarding your existing partnerships.

CUSTOMER RESOURCES

- Support Center
- Billing Information
- Webinar Training
- System Troubleshooting
- ★ Partner Information

News Feed

Priority	Date	Trading Partner - Headline
!	01/19/2016	Process Update
	12/08/2015	Partnership with SPS
!	09/16/2015	Document information

Company User Admin is where you can enable email notifications to be sent when a document is received from McKesson.

ADMINISTRATION

- User Security Profile
- Company User Admin

To govern permissions and update the recipients for automated emails, click **Edit** on the right-hand side of the username for which you would like to update permissions.

At the top of the page is the Email Address field. Each time a document posts to a WebForms account, an automated email is sent out. You can add or remove recipients here, with each email address separated by a single space.

Display Name: Email Address: **150 character limit**

If the email addresses listed exceed the 150 character limit, try creating an internal distribution list so that all persons can receive new document email notifications.

PRO TIP

SPS Commerce recommends that you monitor your WebForms Inbox, just as you would an email Inbox, to ensure that a new document is not missed.

Automated emails are generated on a per-username basis, so documents received from all trading partners for a particular username will generate an email to the email address(es) listed within Company User Admin.

Inbox / Sent / Drafts

Click **WebForms Fulfillment** at the top of the page to access your WebForms account.

SPS COMMERCE **WebForms Fulfillment**

The **Inbox** will house all documents sent from McKesson and any other trading partner you are connected with.

The **Sent** folder will house any document you sent to McKesson or any other trading partner. You can check to see if you document was received by the retailer by checking the icon in the status column. When a document is first sent the font will be bold and the status icon will be an envelope.

Once the document has been accepted into the retailer's system the font will turn to regular font and the icon will change to a piece of paper.

Status	Sender	Type	Date
	Supplier	**Price Authorization**	**02/14/2016 19:13:08 CST**

Status	Sender	Type	Date
	Supplier	Price Authorization	02/14/2016 21:48:12 CST

The **Drafts** folder will house any *saved* documents that may still need additional information before being sent to McKesson.

845-Price Authorization Acknowledgment

Also known as Contract Alert/Bid Award/Update

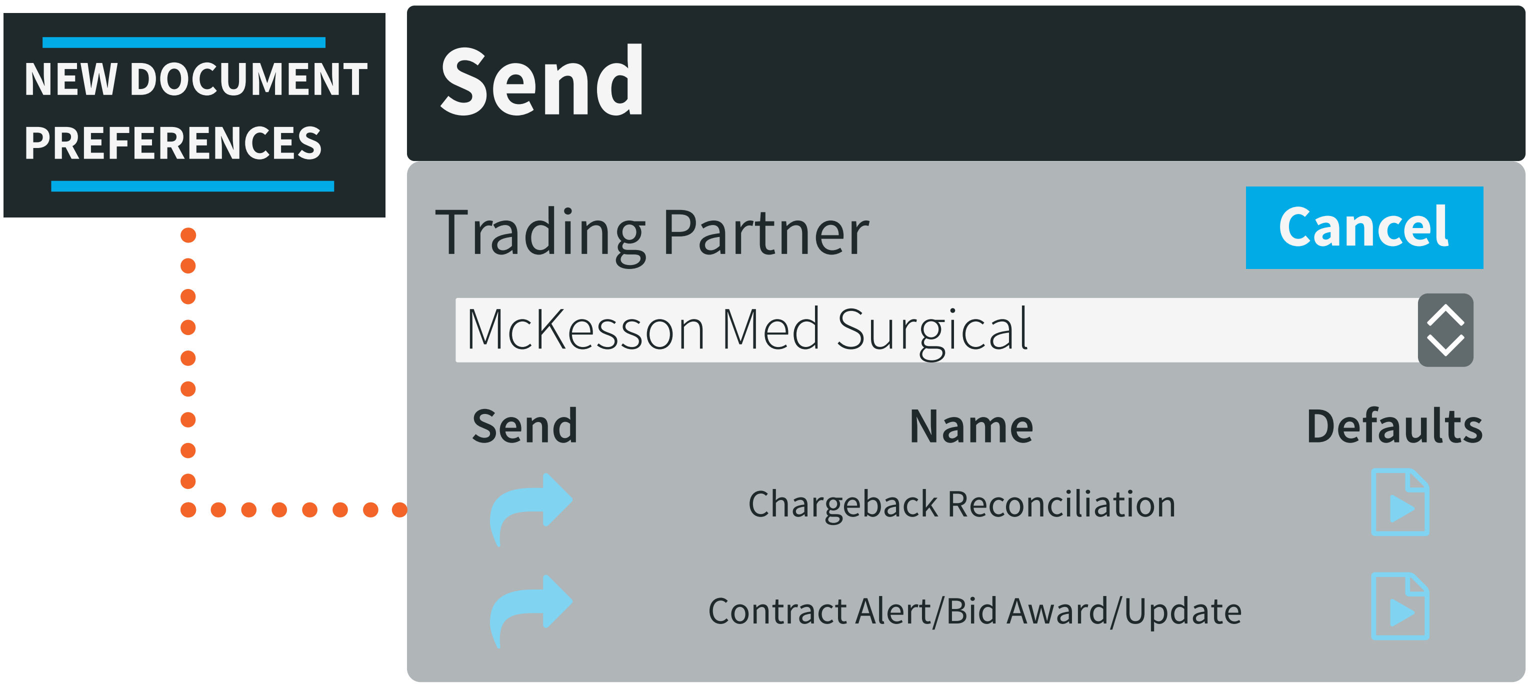
McKesson requires the 845 Price Authorization Acknowledgement as a way to maintain the timely and accurate management of Suppliers & Manufacturers and their contract details with their customers.

Suppliers are expected to report new contracts, renewed contracts, and contract changes (including any customer updates, product updates, date changes or date-extensions, and/or expired, cancelled or terminated contracts).

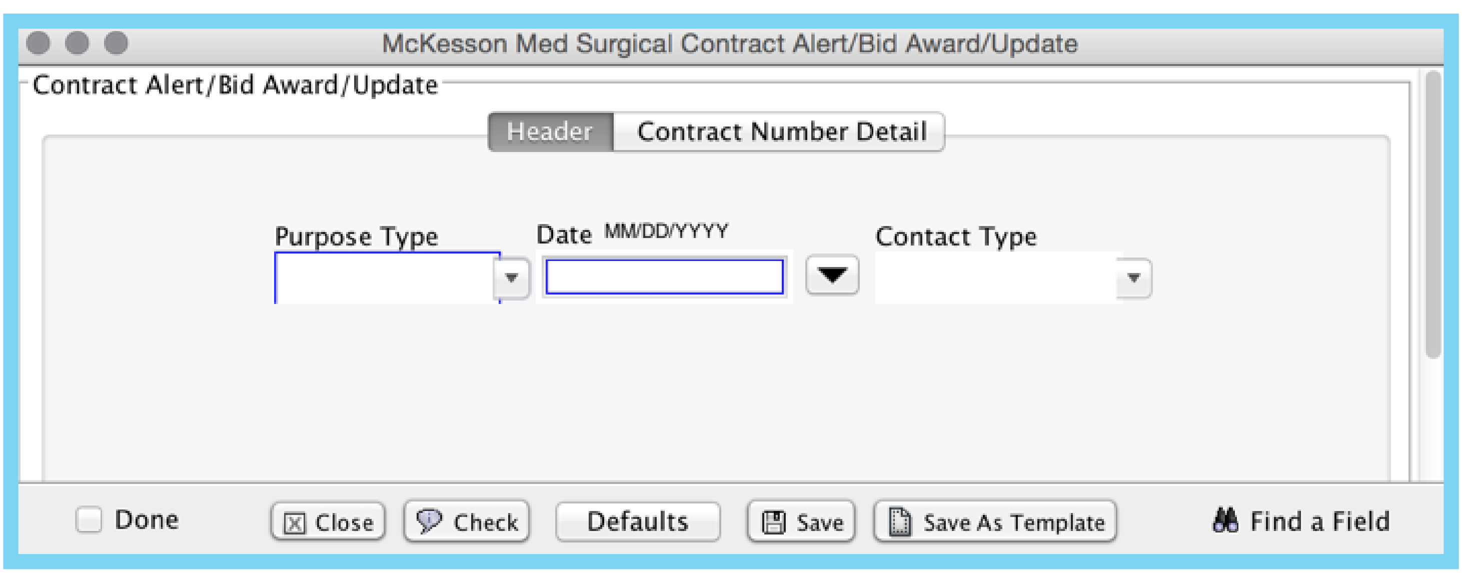
Mckesson requires a minimum 45 day notice prior to the effective date of the awarded new contract and not less than 15 days prior to the effective date of a contract change. This allows time to load the SKUs, adjust inventory levels, and/or load any other data necessary to manage transactions.

Only details that need to be updated should be included in an 845 data feed. McKesson does not expect a refresh of the entire contract in a file update.

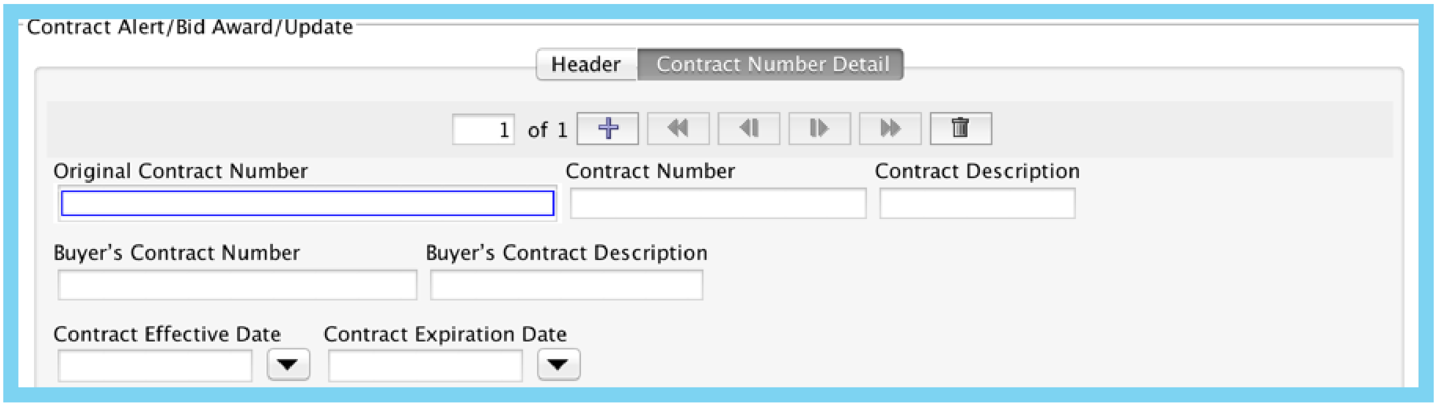
To access the Price Authorization Acknowledgment, navigate to the far left column of the WebForms account and click on **New Document**. From the Trading Partner drop-down menu, select **McKesson Med Surgical**. A list of documents will appear: click on **Contract Alert/Bid Award/Update**.



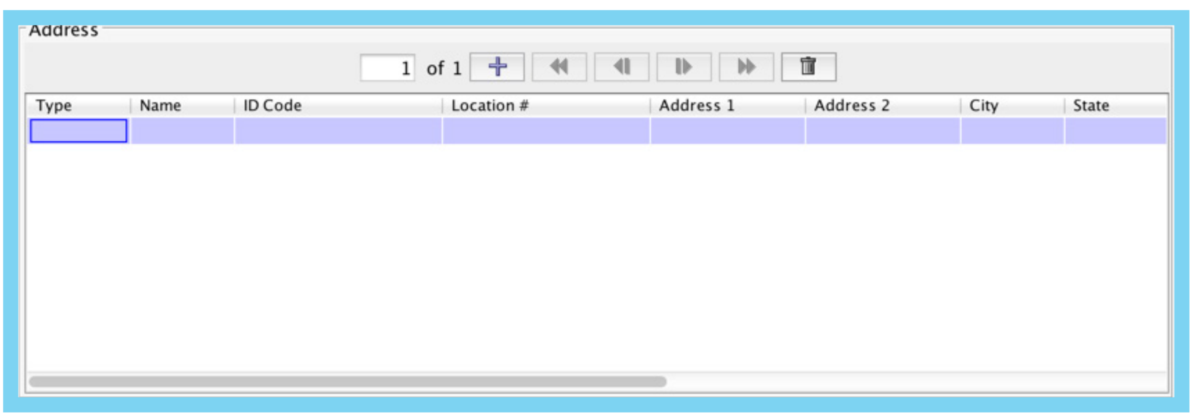
On the **Header** tab, complete all fields outlined in blue. The **Purpose Type** will indicate the type of update being submitted. If you are sending the update for the first time, select ***Original*** from the drop-down menu. If the document will be updating an original, select ***Change***. For a reissued Contract Alert, select ***Reissued***.

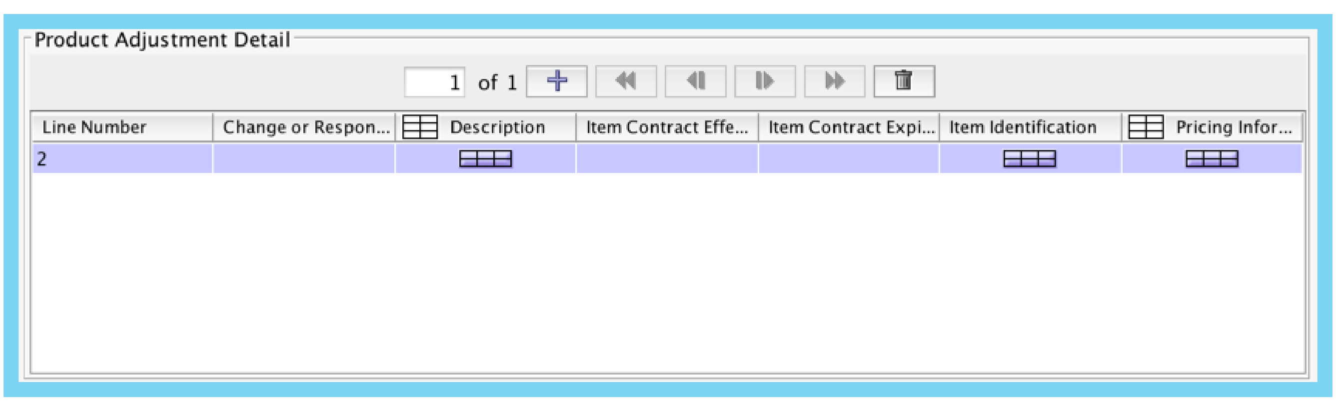


Upon completing the Header tab, navgiate to the **Contract Number Detail** tab. At the top of the page, click the plus sign to source in the **Original Contract Number** field as a mandatory field.



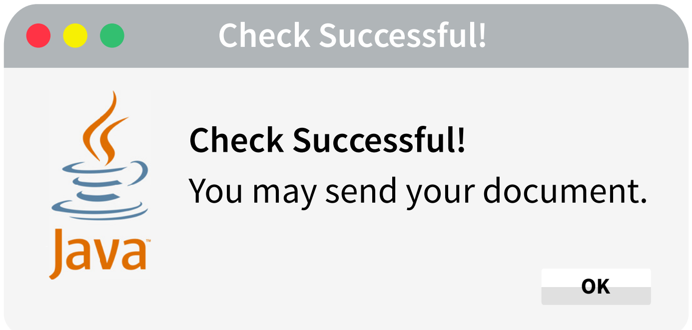
After filling in the mandatory information, click the next plus sign under **Address**. Complete the line that sources in before clicking the plust sign under **Product Adjustment Detail**. Click in to each box and fill in the corresponding information. When you click into the ***Description***, ***Item Identification*** or ***Pricing Informatio***n boxes, an additional box will pop up with additional fields that will need to be completed.



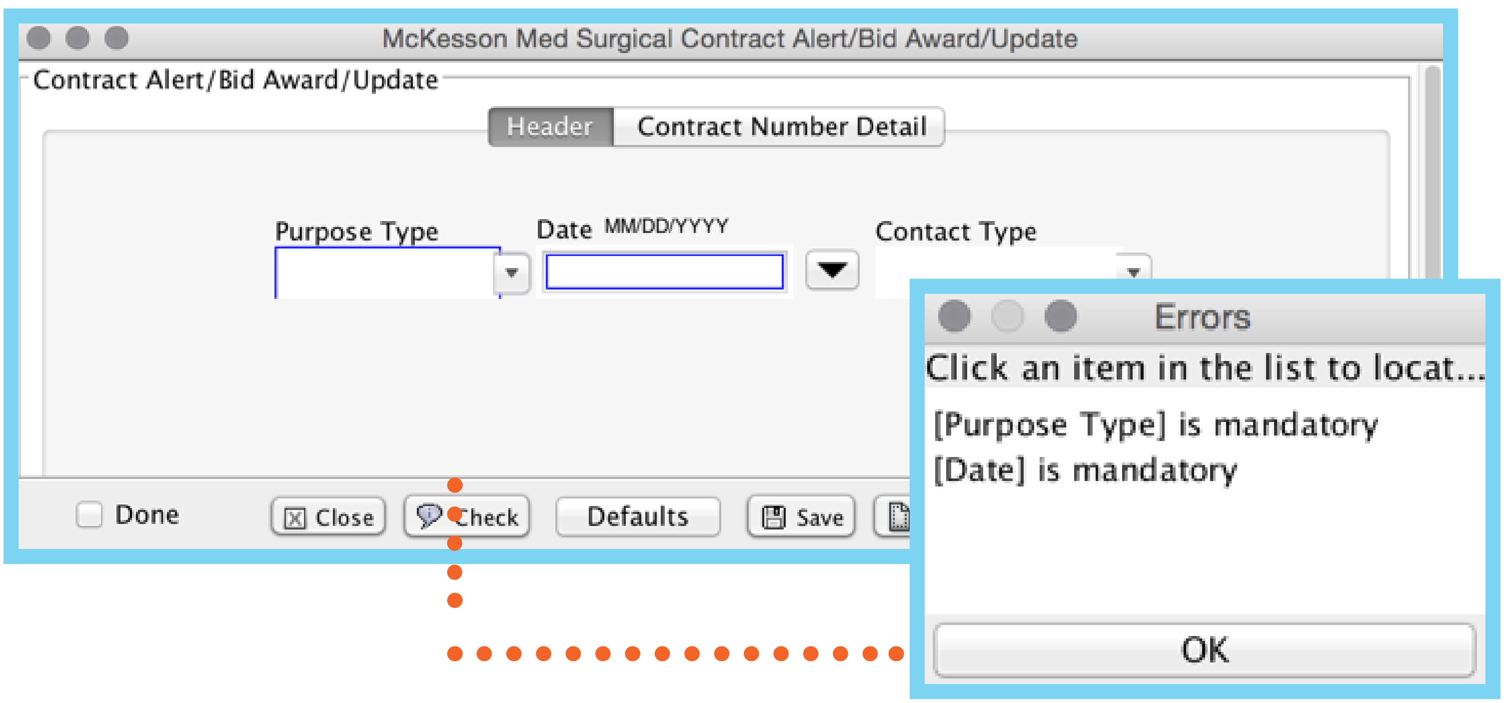


Upon completing all mandatory fields, click the 

button at the bottom of the form. If you receive ***Check Successful!***, you are ready to send the document.



If you missed a mandatory field on the form, you will receive an error message indicating the error on the form. Click on the error message to see where information is missing on the form.



849-Chargeback Reconciliation

Suppliers must provide feedback on the 844 -Product Transfer Request also known as Chargeback Claims via the 849-Chargeback Reconciliation.

The reconciliation information will be used to assist with the timely resolution of discrepancies between the claim requests sent by McKesson and the Supplier-Customer contract details.

Suppliers are required to:

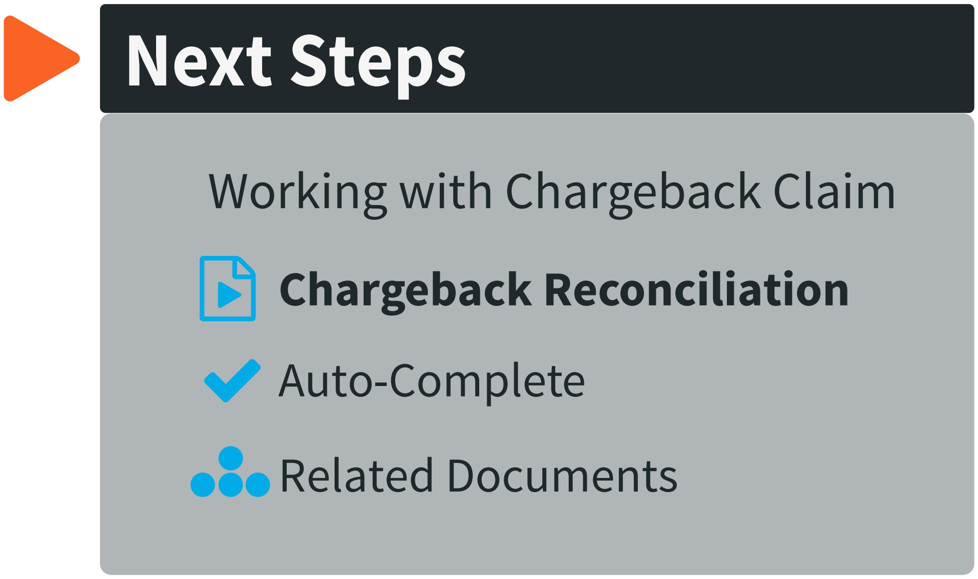
1. Send an 849 for each claim filed. Accept the entire order's requirements "as-is", and indicate transmission of a chargeback payment. If you are not accepting the order as is, report exceptions or request changes at the header or item level.

2. Use the 849 document to confirm receipt of the Claim or to report any errors in the Claim such as customer, product, and/or price information.

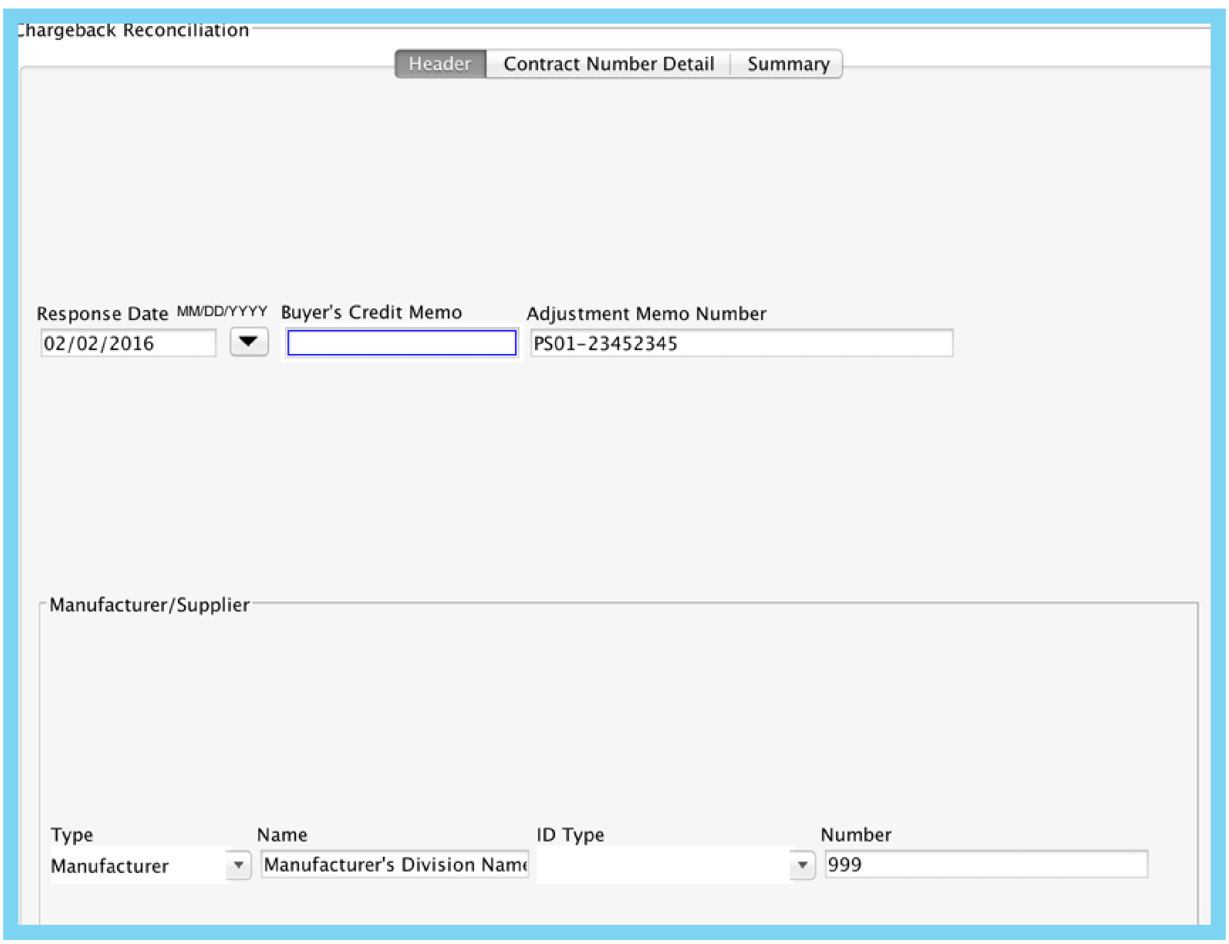
3. The 849 should include credit for the undisputed and adjusted credit amounts along with any line item denied for credit.

Only items found in error (adjusted or denied) should be transmitted back to the distributor with a reject reason code. The 849 should be transmitted back to McKesson ***within 30 days*** *after receipt of the original chargeback claim.*

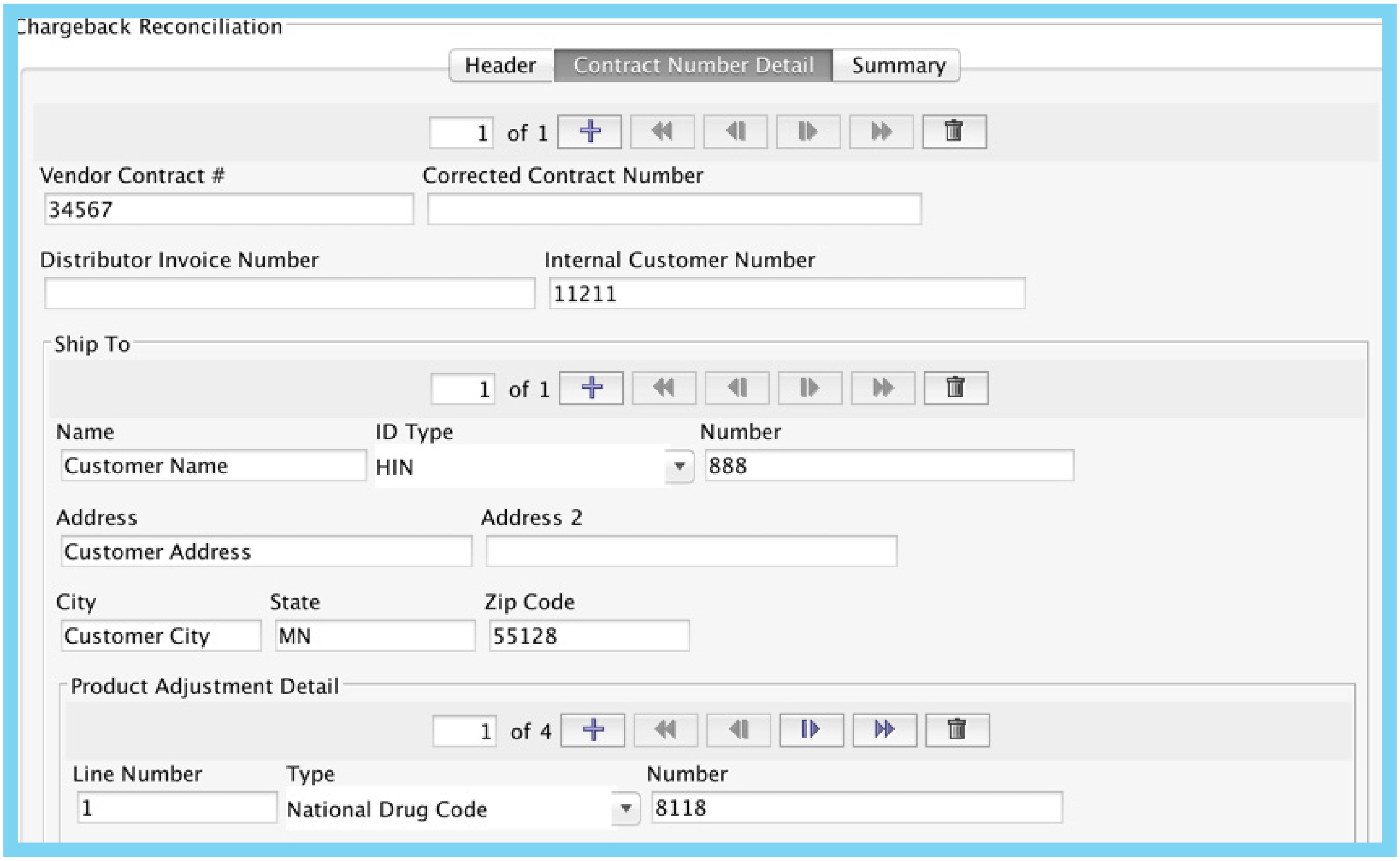
To access the **Chargeback Reconciliation**, click the orange Next Steps triangle off of the Product Transfer Request. From the ***Next Steps*** box, select **Chargeback Reconciliation**.



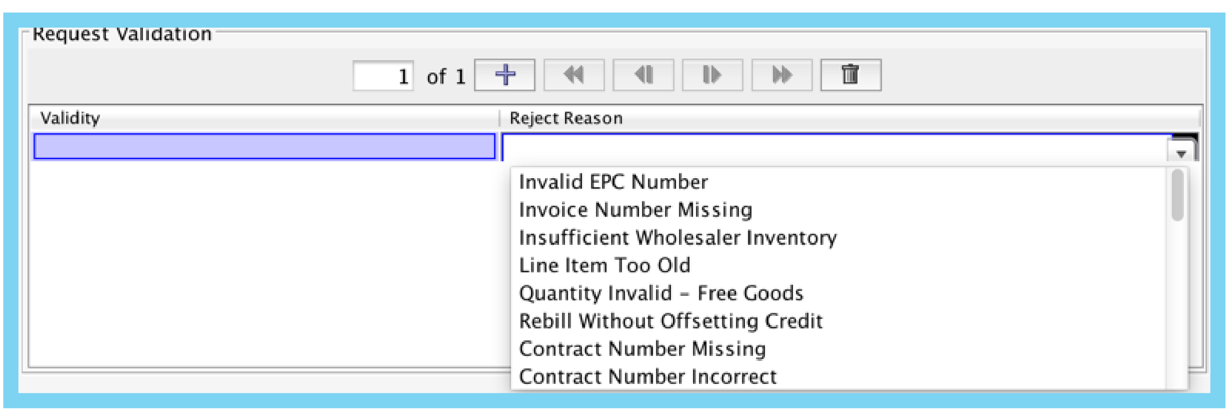
After the form loads, fill in the fields outlined in blue.



Upon completing the Header tab, navigate to the **Contract Number Detail** tab. Click the plus sign at the top of the form to select the Contract Number to work with. Highlight the Contract Number by clicking onto the Line Item, then click **OK**. This will source in all of the information from the top of the form down to ***Product Adjustment Detail***.

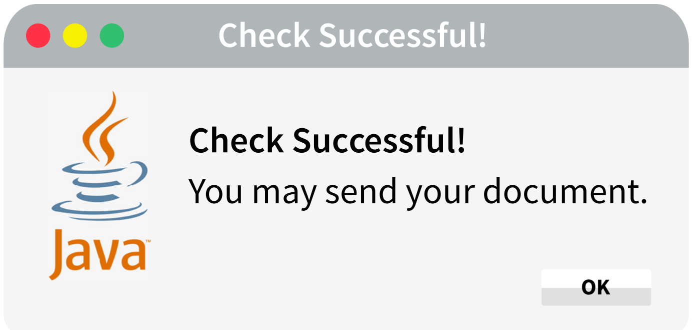


Click the plus sign under **Request Validation**. Fill in the validity and reject reason boxes. If there is more than one detail, utilize the navigation arrows to the right of the plus sign under Product Adjustment Detail. This will scroll through each page for you to enter in the request validation for each.



Enter any additional information needed in the ***Prices*** and ***Quantity*** fields. Please note: these are not mandatory sections; the information added is optional.

Upon completing the form, click the **Check** button at the bottom of the form, if you receive "check successful" you are then ready to send the document.



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Support Center

The **SPS Commerce Support Center** is home to a wide variety of training material, including videos and forums for answering common EDI-related questions. Access the Support Center by clicking on the blue banner at the bottom of the WebForms portal home page, or by navigating to **supportcenter.spscommerce.com**.