

Welcome to the Pharmacy Technology Solutions Family

New Store Opening
Welcome Package

propel Rx **propel** POS

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WELCOME

Welcome to the Pharmacy Technology Solutions family. We would like to thank you for choosing PTS for your pharmacy's technology needs. This guide was created to provide the tools and resources needed to successfully open your pharmacy. Remember we are only a phone call away.

PTS is looking forward to working with you to ensure a successful store opening. As your business grows, you can count on PTS to recommend the right products and services for your business along the way. This guide contains some key contact information, useful tips, training outlines and helpful PTS Portal information to help get you started.

IMPORTANT REMINDERS

As you're busy preparing for your grand opening, there are few tasks you need to complete.

1. Contact your local College of Pharmacists, Provincial Association, or other regulatory boards to ensure you have completed all necessary requests associated with your opening inspection.
2. Depending on your provincial regulatory requirements, you may need to contact provincial Drug Information Systems (DIS); or other provincial plans (such as Alberta NetCare and/or British Columbia PharmaCare). Lead time is often required to ensure approval is provided prior to opening.
3. Apply for necessary third-party provider numbers so you have them for opening day.
4. Create standard operating procedures for your pharmacy.
5. Contemplate the pricing (for both Rx and POS) that you wish to implement in your pharmacy and provide it to PTS during your kickoff call.
6. Register for the [PTS Connector](#) to ensure you stay informed on important information provided by PTS.

IMPORTANT CONTACTS

Here is a list of helpful contacts:

PTS Customer Care

(Available help when you need it) 1.800.387.6093 or ptscustomer@ckesson.ca

PTS Sales

(Product & services inquiries) 1.800.387.6093 Option 5 or ptssales@ckesson.ca

PTS Learning

(Training and Retail Learning Academy Administration) ptslearning@ckesson.ca

Check our [PTS Portal](#) for list of Contacts.

SALES

As a new member of the PTS family, we want you to know that your dedicated PTS Sales Representative is here to assist you. You can contact Sales at ptsales@mkcesson.ca or 1-800-387-6093 Option 5. For more information about our offerings, explore the [PTS Product & Services Catalogue](#).

CUSTOMER CARE & FIELD SERVICES

Customer service has always been a key part of what we stand for at PTS. There are over 60 employees dedicated to customer care and field service across Canada. Regardless of where your business is located, we are available to help when you need it.

We can be reached by phone at 1-800-387-6093 and are available for critical incidents 24/7. You can also email non-urgent requests to ptscustomer@mkcesson.ca. Additional information about our dedicated teams and to print important contact information can be found by clicking [here](#). We are your one-stop shop for pharmacy solutions.

LEARNING PHARMACY SOFTWARE SOLUTIONS

The Learning team is a group of passionate educators, dedicated to providing the training solutions you need to set your store up for success. An essential component of the training package is the support you receive on Go Live day, as well as the days that follow.

All new stores must complete the mandatory eLearning that can be found on our [Retail Learning Academy](#). This eLearning is supplemented with Q&A sessions hosted by our experienced trainers. Training can be tailored to fit your store's specific needs.

We offer a full suite of learning for our products, click [here](#) to learn more. Meet our learning team by clicking [here](#).

RESOURCES

PTS Portal

The Portal is the central place for making all types of information accessible. Click [here](#).

Videos to Watch

Have a look at [past recordings](#). There are various topics that may be of interest to you.

Retail Learning Academy (RLA)

Access the RLA Login [here](#). Visit our FAQ on the RLA [here](#).

Online Help

The Propel Rx Online Help can be found [here](#) and the Propel POS Online help can be found [here](#).

INSIDER TRAINING TIPS

Get the most out of your training days with these insider tips.



Select a System Administrator

- This is a member of your team who will assume ownership of the implementation and be the main contact for your training.
- The system administrator chosen must be fully available to work with the trainer during the entire process.



Select a Retail Learning Academy (RLA) Administrator

- Since your learning journey includes eLearning, a Retail Learning Academy administrator will be required to register and manage team activities.
- The RLA Admin should monitor completion of the eLearning courses and ensure your team attends the Q & A sessions.
- Contact ptslearning@mckesson.ca, if you experience any issues with the RLA or if you need help registering your staff. We are here to help you be successful!
- Check the [list of FAQs](#) on our Online Help.



Get the most out of your training time

- Work with PTS to ensure your pharmacy preferences are properly selected so your systems can be shipped with the proper settings.
- The following pages provide the training outlines for both Propel Rx and Propel POS, ensure you are familiar.
- Ensure all team members that require training are available for the entire allocated training time.



Develop pricing rules for the pharmacy

- Having pricing rules prepared will help the trainer guide you through proper setup and testing, prior to opening.

SELF-DIRECTED & INSTRUCTOR LED LEARNING

Learning Propel Rx or Propel POS is a combination of self-directed eLearning through the [Retail Learning Academy \(RLA\)](#) as well as instructor led sessions with experienced trainers, either virtually or onsite.

The RLA is an online learning platform which provides courses and recorded webinars for our PTS software offerings. By having full access to our suite of courses, lessons can be re-taken online at any time. Conveniently learn on any device, in any location. Learn more about the Retail Learning Academy by visiting our Online Help [here](#).

Both the Propel Rx and Propel POS eLearning are broken down into modules to help you learn the key concepts in easy-to-understand bits of information.

After completing the mandatory eLearning course, you'll be ready to start using Propel Rx or Propel POS. Prior to your opening, a Question & Answer (Q&A) session will be hosted by an experienced trainer. You'll be supported, either on site or virtually, for both Go Live day and the day after. Your support does not stop there. Various touchpoints will be completed as your business grows.

NOTE: *Each team member must complete the self-directed eLearning prior to the scheduled session with a trainer.*

LEARNING PROPEL RX & PROPEL POS

Your learning journey has been broken down to four phases for both Propel Rx and Propel POS:



**Self-Directed eLearning using the RLA
Q&A Session**



Virtual or onsite support Go Live Day



Virtual or onsite support for the day after Go Live Day



Virtual Follow ups on a regular basis

- Click [here](#) for the Propel Rx Learning Journey
- Click [here](#) for the Propel POS Learning Journey

PHARMACLIK ORDERING

What is PharmaClik?

PharmaClik is McKesson Canada's wholesale distribution website. It gives pharmacies the opportunity to order front shop and dispensary items online. The link to the ordering website can be found [here](#).

How to place your RX Opening Order

It's important to place orders and receive goods for your new pharmacy. When creating your opening orders from the PharmaClik website, you must **manually** enter a purchase order number. If you don't follow the steps below, your opening order will not be applied, and you will need to manually enter each item's inventory into Propel Rx.

How to enter a purchase order number on the PharmaClik Website for an opening order:

1. Log into **PharmaClik** website.
2. Detail your opening order on the **Order Management** screen.
3. Select **P.O.#** field and enter a purchase order number in the following format:
 - a. Start with **"RX"** in uppercase letters.
4. Enter one or more **numbers** following **"RX"**.
5. Do not enter any alphabetical characters beside the RX prefix.
6. Do not enter any spaces.

Example: RX123

Once the opening order is received, PTS will provide the support required to ensure that the opening order is applied to Propel Rx.

Flyer Program Sign up

If you are part of Guardian/IDA, or Remedy'sRx banners, please contact your Member Account Executive or email flyers@mckesson.ca.

PTS PORTAL

The PTS Portal is a secure web-based platform that provides the most relevant information for the PTS Community. The portal contains a wealth of knowledge ranging from guidance on pharmacy solutions and learning materials to essential financial information.

How to access the PTS Portal

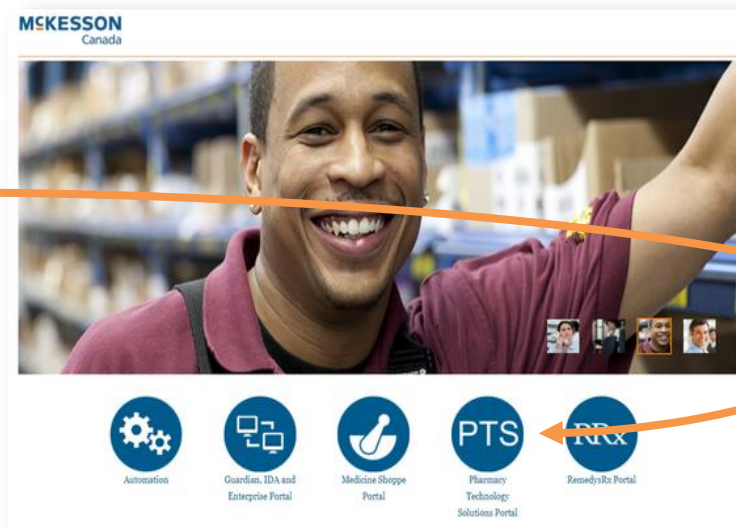
You can access the PTS Portal at portal.mckesson.ca. If you are joining the PTS family for the first time, you will receive an email from McKesson that contains your temporary password. Log in promptly to set your own secure password. If you already have access to the PTS Portal, this new account will be added to your existing login.

If you haven't logged in yet, please do so within the next few days. Should you need help, our PTS Customer Care team is available. Be sure to tell them right away that you are calling about the PTS Portal.

Manage and give your entire team access

There is an abundance of learning information on the PTS Portal. It is imperative that your team is also granted access. Should you need assistance with this or any other PTS Portal related concerns, feel free to contact PTS Customer Care.

Access the PTS Portal [here](https://portal.mckesson.ca).



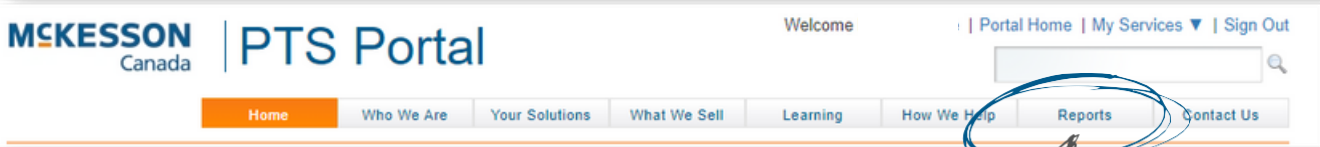
Browse Resources

Take some time to browse the resources available on the PTS Portal, including:

- [How to Download and Save Financial Documents](#)
- [Learn how to grant access to your Team Members](#)
- [Learning Materials](#)
- [PTS Blog](#)
- [Contact Us](#)

SAMPLE INVOICE

Finding invoices is easy on the PTS Portal. You can access them through the Reports menu. If you are unable to locate your invoices, please contact Customer Care at 1-800-387- 6093 (Press 2) or by email at ptscustomer@ckesson.ca. Other related invoice questions should be directed to 1-800-387-6093 (Press 5) or by email at ptssales@ckesson.ca



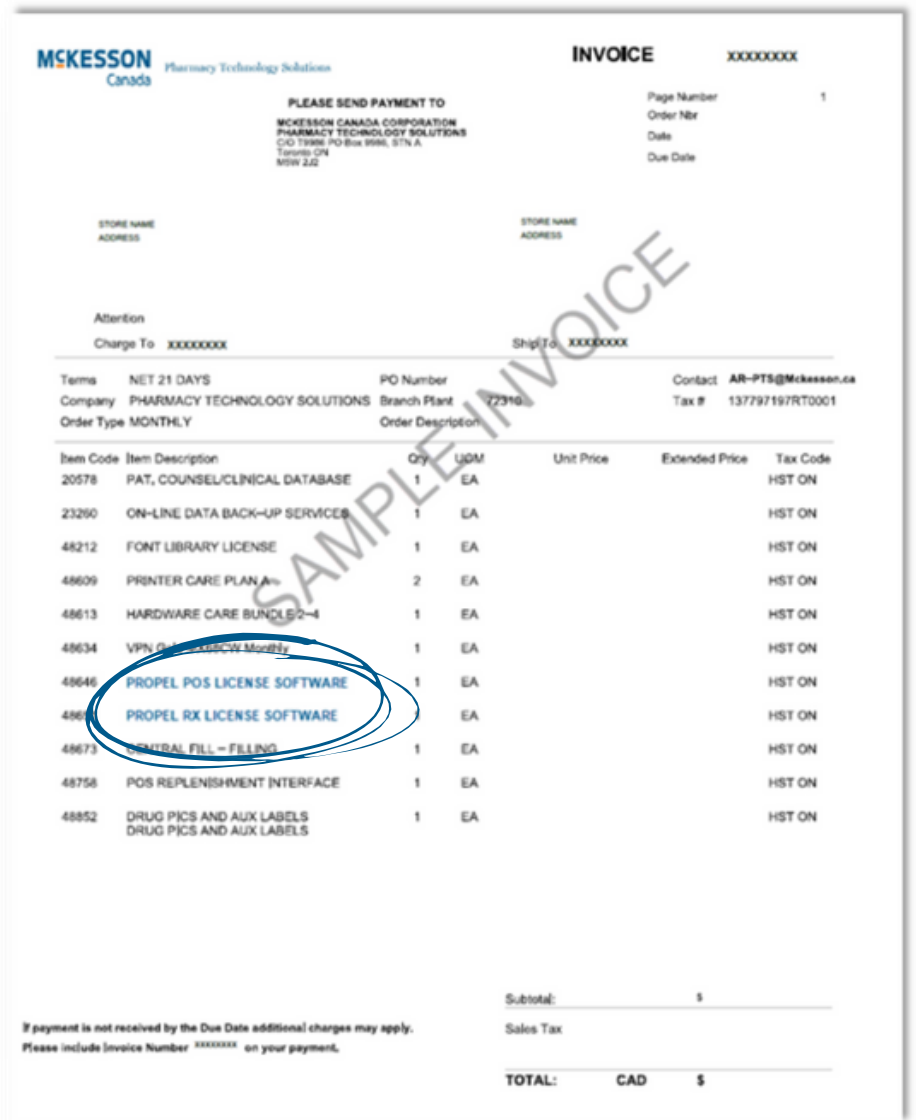
Reports tab

How to read invoices

Here's what a sample PTS invoice looks like. Have a peek at some key areas to ensure you are well versed on how to read an invoice.

There are indicators that will identify your Propel Rx or Propel POS system, as well as other products and services you may have.

Your Sales Representative would be happy to review the full list with you.





Pharmacy Technology Solutions

2300 Meadowvale Blvd.
Mississauga, ON L5N 5P9

1.800.387.6093
pts@mckesson.ca

pharmacytechnologysolutions.ca

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