

mcs.mckesson.com

Financial Tools

Your guide to using McKesson's Financial Tools

McKesson Specialty Care Solutions provides you with the financial information you need to run your practice. This guide provides an overview of the mcs.mckesson.com Financial Tools tab.

After reviewing the document you will know:

- How to make a payment online
- How to view past invoices and credits
- How to view payment and invoice history
- How to search for invoices

This guide covers the Financial Pages section of the website. If you want information regarding the Order Center or Basic Navigation, please refer to those training guides.

Basic Navigation	2
Account Balances	3
Credits	4
Payments	5
Pay Bills	6
Paid Bills	8
Invoice Search	9
Switch Accounts	10
Technical Support	10
Feedback	10

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Financial Tools

Basic Navigation

From the mcs.mckesson.com homepage click the **Financial Tools** tab in the top navigation bar to see and execute financial transactions.

The screenshot shows the mcs.mckesson.com homepage. The navigation bar includes 'Order Center', 'Financial Tools' (highlighted with a red box), and 'Reports'. Below the navigation bar, there is a search bar and a shopping cart icon. A yellow banner at the top indicates 'You have open orders.' The main content area is divided into several sections: 'Message center' with a 'Welcome' message and 'Important News' links; 'Training Center' with 'Reimbursement Updates' and 'Hot Issues Update' links; 'Product News' and 'Promotions'; 'Your Recent Order' table; and 'Items in Favorite List : 89176 : CCI Template' table. The 'Your Recent Order' table lists several orders with their respective dates and statuses. The 'Items in Favorite List' table lists various pharmaceutical products with their descriptions, NDC numbers, unit prices, and availability status.

Order#	Order Date	ShipTo	Status
0100466882	Jun 24, 2010	0000202897	open
0100466482	Jun 18, 2010	0000202897	open
0100466473	Jun 18, 2010	0000202897	open
0100466474	Jun 18, 2010	0000202897	open
0100466360	Jun 11, 2010	0000202897	open

Product#	Description	NDC#	Unit price	Availability	Qty	Actions
5001189	AVASTIN 25MG/ML 16ML SDV 1/EA	50242-0061-01	2,344.65	✓		Actions
5001190	AVASTIN 25MG/ML 4ML SDV 1/EA	50242-0060-01	586.16	✓		Actions
5001915	DACOGEN 50MG SDV LYO PWD 1/EA	62856-0600-01	1,545.66	✓		Actions
5001194	HERCEPTIN 440MG MDV W/DIL 1/EA	50242-0134-68	2,883.18	✓		Actions
5000174	NEULASTA 6MG/0.6ML SYR 1/PAC	55513-0190-01	3,291.84	✓		Actions
5001195	ORENCIA 250MG 15ML SDV PWD 1/EA	00003-2187-10	535.77	✓		Actions

Select your account. If you have access to more than one site, you can select the appropriate site from the "Switch Accounts" Page.

The screenshot shows the 'Switch Accounts' page. The navigation bar includes 'Order Center', 'Financial Tools', and 'Reports'. Below the navigation bar, there is a search bar and a shopping cart icon. A yellow banner at the top indicates 'You have open orders.' The main content area is divided into several sections: 'Message center' with a 'Welcome' message and 'Important News' links; 'Training Center' with 'Reimbursement Updates' and 'Hot Issues Update' links; 'Product News' and 'Promotions'; 'Your Recent Order' table; and 'Items in Favorite List : 89176 : CCI Template' table. The 'Your Recent Order' table lists several orders with their respective dates and statuses. The 'Items in Favorite List' table lists various pharmaceutical products with their descriptions, NDC numbers, unit prices, and availability status.

Select your account.

Your account with us

- [0000202897: McKesson Lynx Demo](#)
- [0000000000: Onc Hem Assoc of Central CA](#)
- [0000000001: MEDICAL ONC HEM ASSOC](#)

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Account Balances

The Account Balances page displays all invoices, payments, and credits

To see the detail of account balances, simply click the [link](#) for the invoices, payments & credits or accumulated balance you would like to view

Account Balances | Credits | View Payments | Pay Bills | Paid Bills | Invoice Search | Switch Account

Balances

To see the items for a particular period, click on the corresponding amount.

Year:

Month	Invoices	Payments & Credits	Accumulated Balance	Statement Balance
-> 2010			USD 604,480.83	
01/2010	USD 3,297,804.78	USD 3,667,384.23	(USD 369,579.45)	USD 234,901.38
02/2010	USD 3,870,752.69	USD 3,750,830.93	USD 119,921.76	USD 354,823.14
03/2010	USD 923,331.46	USD 1,275,145.52	(USD 351,814.06)	USD 3,009.08
04/2010	USD 52,052.58	USD 44,327.10	USD 7,725.48	USD 10,734.56
05/2010	USD 3,344.50	USD 0.00	USD 3,344.50	USD 14,079.06
06/2010	USD 13,438.72	USD 6,956.25	USD 6,482.47	USD 20,561.53
07/2010	USD 3,014.20	USD 0.00	USD 3,014.20	USD 23,575.73
08/2010	USD 0.00	USD 0.00	USD 0.00	USD 23,575.73
09/2010	USD 0.00	USD 0.00	USD 0.00	USD 23,575.73
10/2010	USD 0.00	USD 0.00	USD 0.00	USD 23,575.73
11/2010	USD 0.00	USD 0.00	USD 0.00	USD 23,575.73
12/2010	USD 0.00	USD 0.00	USD 0.00	USD 23,575.73
Total	USD 8,163,738.93	USD 8,744,644.03	(USD 580,905.10)	

[Print](#) [Excel](#)

To see the detail of any invoice, credit, or payment click on the document to display the PDF format

Account Balances | Credits | View Payments | Pay Bills | Paid Bills | Invoice Search | Switch Account

Invoice Details

Line items 2010: Jan - Invoices

Transaction Type	Sold To Site	Due	Clearing Date	Reference	Reference Date	Amount	Action
0300456123 - Invoice - Jan 5, 2010	2266	Jan 7, 2010	Jan 7, 2010	0300456123	Jan 5, 2010	USD 92,258.94	
0300474841 - Invoice - Jan 26, 2010	2266	Jan 28, 2010	Jan 28, 2010	0300474841	Jan 26, 2010	USD 91,447.48	
0300471685 - Invoice - Jan 21, 2010	2266	Jan 23, 2010	Jan 25, 2010	0300471685	Jan 21, 2010	USD 75,700.12	
0300473955 - Invoice - Jan 25, 2010	2266	Jan 27, 2010	Jan 27, 2010	0300473955	Jan 25, 2010	USD 74,057.63	
0300466268 - Invoice - Jan 15, 2010	2266	Jan 17, 2010	Jan 20, 2010	0300466268	Jan 15, 2010	USD 65,673.04	
0300476518 - Invoice - Jan 27, 2010	5245	Jan 29, 2010	Jan 29, 2010	0300476518	Jan 27, 2010	USD 58,666.22	
0300472467 - Invoice - Jan 22, 2010	2266	Jan 24, 2010	Jan 26, 2010	0300472467	Jan 22, 2010	USD 58,453.73	

[Display Bill in PDF Format](#)

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Credits

To see a list of available credits click the "Credits" tab in the blue navigation bar.

Credit	Valid from	Credit Amount	Available	Action
Credit memo 0300512955 of 04/26/2010	Apr 26, 2010	USD 76.00	USD 76.00	
Credit memo 0300512956 of 04/26/2010	Apr 26, 2010	USD 95.00	USD 95.00	
Credit memo 0300514300 of 06/14/2010	Jun 14, 2010	USD 241.02	USD 241.02	
Credit memo 0300514346 of 06/16/2010	Jun 16, 2010	USD 3,322.79	USD 3,322.79	
Credit memo 0300514350 of 06/16/2010	Jun 16, 2010	USD 562.93	USD 562.93	
Credit memo 0300514353 of 06/16/2010	Jun 16, 2010	USD 562.93	USD 562.93	
Total			USD 4,860.67	

The Credits page gives you a brief description of the credit. To find out more information or view the credit, click the credit description link. Click the credit memo [link](#) to see more detail regarding the credit memo.

McKesson Specialty Care Distribution / 401 Mason Road / La Vergne TN 37086

Recipient:
Onc Hem of McKesson
401 Mason Road
La Vergne, TN

Date:
Apr 26, 2010

Total Price Net:
USD 76.00

Taxes:
USD 0.00

Total Gross Price:
USD 76.00

Bill: 0300512955 - Reference: 0300512955

Item	Product Number	Quantity	Unit	Product Description	Reference Document/Item	Net Price	Gross Price
000010	000000000005000098	40.000	EA	DIAZEPAM 5MG TAB IX C4 100/EA	0600020992 / 000010	USD 76.00	USD 76.00

Due Date: Apr 28, 2010 **Terms of payment:** CHOICE POP

[Print](#) [Close](#)

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Payments

To view a list of payments click the "View Payments" tab in the navigation bar.

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Welcome, **WEBUSER01** [Logout](#)

Order Center **Financial Tools** **Reports**

Account Balances | Credits | **View Payments** | Pay Bills | Paid Bills | Invoice Search | Switch Account

List of Payments

To display the list of payments, select the appropriate search criteria:

Status: Payment Method: Period:

Payments	Used On	Payment Amount	Payment Method	Action
Payment *****5819 of 07/01/2009	Jul 1, 2009	USD 235,479.03	Other Payments/Settlements	
Payment *****6353 of 07/02/2009	Jul 2, 2009	USD 308,645.38	Other Payments/Settlements	
Payment *****6578 of 07/06/2009	Jul 6, 2009	USD 428,313.37	Other Payments/Settlements	
Payment *****7344 of 07/07/2009	Jul 7, 2009	USD 41,077.49	Other Payments/Settlements	
Payment *****8164 of 07/08/2009	Jul 8, 2009	USD 239,804.72	Other Payments/Settlements	
Payment *****8179 of 03/05/2010	Mar 5, 2010	USD 243,200.62	Other Payments/Settlements	
Payment *****9409 of 03/08/2010	Mar 8, 2010	USD 140,952.63	Other Payments/Settlements	
Payment *****9873 of 03/29/2010	Mar 29, 2010	USD 161,201.62	Other Payments/Settlements	
Payment *****8904 of 04/26/2010	Apr 26, 2010	USD 148.50	Bank Collectn Account *****	
Payment *****8924 of 04/26/2010	Apr 26, 2010	USD 594.00	Bank Collectn Account *****	
Payment *****9013 of 06/22/2010	Jun 22, 2010	USD 2,266.58	Bank Collectn Account *****	

You can see more information about the payment by clicking on the payment amount [link](#).

List of Bills Paid with One Payment

Bill information for the following payment:

Payments	Paid On	Payment Amount
Payment *****5819 of 07/01/2009	Jul 1, 2009	USD 235,479.03

You have used the following credits for the payment:

Credit	Used On	Credit Amount	Used
Credit memo 030029826 of 06/29/2009	Jul 1, 2009	USD 6,009.47	USD 6,009.47

The following bills were paid with this payment:

Invoice	Due On	Scheduled Date	Billed Amount	Paid with this Payment
Invoice 0300297825 of 06/29/2009	Jul 1, 2009	NA	USD 94,536.21	USD 94,536.21
Invoice 0300298992 of 06/29/2009	Jul 1, 2009	NA	USD 1,237.61	USD 1,237.61
Invoice 0300298348 of 06/29/2009	Jul 1, 2009	NA	USD 20,820.96	USD 20,820.96
Invoice 0300298514 of 06/29/2009	Jul 1, 2009	NA	USD 3,908.42	USD 3,908.42
Invoice 0300298924 of 06/29/2009	Jul 1, 2009	NA	USD 5,520.99	USD 5,520.99
Invoice 0300298087 of 06/29/2009	Jul 1, 2009	NA	USD 36,744.52	USD 36,744.52
Invoice 0300298355 of 06/29/2009	Jul 1, 2009	NA	USD 13,225.05	USD 13,225.05
Invoice 0300298515 of 06/29/2009	Jul 1, 2009	NA	USD 8,058.98	USD 8,058.98
Invoice 0300298597 of 06/29/2009	Jul 1, 2009	NA	USD 19,731.22	USD 19,731.22
Invoice 0300298516 of 06/29/2009	Jul 1, 2009	NA	USD 5,546.56	USD 5,546.56
Invoice 0300299001 of 06/29/2009	Jul 1, 2009	NA	USD 3,039.40	USD 3,039.40
Invoice 0300298274 of 06/29/2009	Jul 1, 2009	NA	USD 29,118.58	USD 29,118.58

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Financial Tools

Pay Bills

To make an online payment click the **Pay Bills** tab on the navigation bar

Order Center
Financial Tools
Reports

Account Balances
Credits
View Payments
Pay Bills
Paid Bills
Invoice Search
Switch Account

List of Open Invoices

Days Past Due:	0 days	1-30	31-90	more than 90
Amounts:	USD 5,810.05	USD 10,642.87	USD 11,686.48	USD 297.00

Select Invoices you want to pay:

Invoice	Due	Days Past Due	Sold To Site	Billed Amount	Open	Payment Amount	Action
<input type="checkbox"/> Invoice 0300505096 of 03/01/2010	Mar 31, 2010	92		USD 148.50	USD 148.50		
<input type="checkbox"/> Invoice 0300507147 of 03/02/2010	Apr 1, 2010	91		USD 148.50	USD 148.50		
<input type="checkbox"/> Invoice 0300512539 of 04/05/2010	Apr 7, 2010	85		USD 936.47	USD 936.47		
<input type="checkbox"/> Invoice 0300513648 of 06/01/2010	Jun 3, 2010	28		USD 74.25	USD 74.25		
<input type="checkbox"/> Invoice 0300513649 of 06/01/2010	Jun 3, 2010	28		USD 144.10	USD 144.10		
<input type="checkbox"/> Invoice 0300513630 of 06/02/2010	Jun 4, 2010	27		USD 241.02	USD 241.02		
<input type="checkbox"/> Invoice 0300514217 of 06/02/2010	Jun 4, 2010	27		USD 160.68	USD 160.68		
<input type="checkbox"/> Invoice 0300514284 of 06/14/2010	Jun 16, 2010	15		USD 401.70	USD 401.70		
<input type="checkbox"/> Invoice 0300514480 of 07/01/2010	Jul 31, 2010	0		USD 148.50	USD 148.50		
<input type="checkbox"/> Invoice 0300514481 of 07/01/2010	Jul 31, 2010	0		USD 148.50	USD 148.50		

Select credits you want to apply:

Credit	Valid from	Sold To Site	Credit Amount	Available	Payment Amount	Action
<input type="checkbox"/> Credit memo 0300512955 of 04/26/2010	Apr 26, 2010		(USD 76.00)	(USD 76.00)		
<input type="checkbox"/> Credit memo 0300512956 of 04/26/2010	Apr 26, 2010		(USD 95.00)	(USD 95.00)		
<input type="checkbox"/> Credit memo 0300514300 of 06/14/2010	Jun 14, 2010		(USD 241.02)	(USD 241.02)		
<input type="checkbox"/> Credit memo 0300514346 of 06/16/2010	Jun 16, 2010		(USD 3,322.79)	(USD 3,322.79)		
<input type="checkbox"/> Credit memo 0300514350 of 06/16/2010	Jun 16, 2010		(USD 562.93)	(USD 562.93)		
<input type="checkbox"/> Credit memo 0300514353 of 06/16/2010	Jun 16, 2010		(USD 562.93)	(USD 562.93)		

Net Payment Amount

USD 23,575.73	USD 0.00
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Payment options

Pay Invoices on their due date.

Pay on a specific date

Note*: The invoice payment date must be prior to the due date of the invoice(s) you want to pay. The option to pay invoice on a specific date is not available if any of the invoices you are paying now is past due.
Note**: If you select a past due invoice for payment, the payment for that invoice will be processed today.

Select Bank Account: ***7845 Bank Account Sample NA

Your account will not be debited at this time

- Select the check boxes for any invoices you want to pay and credit memos you would like to apply
- Use the dropdown box to select the appropriate bank account. You may choose to pay invoices on their due date or choose a specific date for any statements that are not past due.
- Click the **Preview Payment** button

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800.482.6700
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6

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- The Payment Preview will appear. Once you are comfortable with the payment details, select **Pay Bill**

List of Invoices Selected for Payment

Review selected invoices below. To submit payment for these invoices, click the button marked 'Pay Bill'.

You scheduled to pay the following invoice(s) on their due date(s).
 Note: If your payment includes a past due invoice, the payment for that invoice will be processed today.

Invoice	Due On	Billed Amount	Open	Payment Amount
Invoice 0300514481 of 07/01/2010	Jul 31, 2010	USD 148.50	USD 148.50	USD 148.50
Credit memo 0300512955 of 04/28/2010	Apr 26, 2010	(USD 76.00)	(USD 76.00)	(USD 76.00)
		Bill Total	USD 148.50	USD 148.50
			Credits	(USD 76.00)
			Net Payment Amount	USD 72.50

Net Payment Amount will be debited from:
 Account *****4550 Wachovia ACH

- A payment confirmation screen will appear. You can print the payment confirmation for your records.

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Paid Bills

You may view the history of processed payments by clicking the **Paid Bills** tab. For more details about the Payment, click the Invoice [link](#).

Order Center | **Financial Tools** | **Reports**

Account Balances | Credits | View Payments | Pay Bills | **Paid Bills** | Invoice Search | Switch Account

List of Invoices Paid or Payment Arranged

To display paid bills, select the appropriate search criteria:

Status: | Period: |

Paid Bill	Due	Scheduled Date	Billed Amount	Already Paid	Status	Payment Method	Action
Invoice 0300297825 of 06/29/2009	Jul 1, 2009	NA	USD 94,536.21	USD 94,536.21	Processed	Other Payments/Settlements	
Invoice 0300298087 of 06/29/2009	Jul 1, 2009	NA	USD 36,744.52	USD 36,744.52	Processed	Other Payments/Settlements	
Invoice 0300298274 of 06/29/2009	Jul 1, 2009	NA	USD 29,118.58	USD 29,118.58	Processed	Other Payments/Settlements	
Invoice 0300298348 of 06/29/2009	Jul 1, 2009	NA	USD 20,820.96	USD 20,820.96	Processed	Other Payments/Settlements	
Invoice 0300298355 of 06/29/2009	Jul 1, 2009	NA	USD 13,225.05	USD 13,225.05	Processed	Other Payments/Settlements	
Invoice 0300298514 of 06/29/2009	Jul 1, 2009	NA	USD 3,908.42	USD 3,908.42	Processed	Other Payments/Settlements	
Invoice 0300298515 of 06/29/2009	Jul 1, 2009	NA	USD 8,058.98	USD 8,058.98	Processed	Other Payments/Settlements	

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Invoice Search

You may search for invoices by clicking the **Invoice Search** tab. You can search for invoices by site, by invoice date range, invoice number, or order number. Once you have entered your search criteria, click Search and you will be presented with a list of invoices that meet your search criteria.

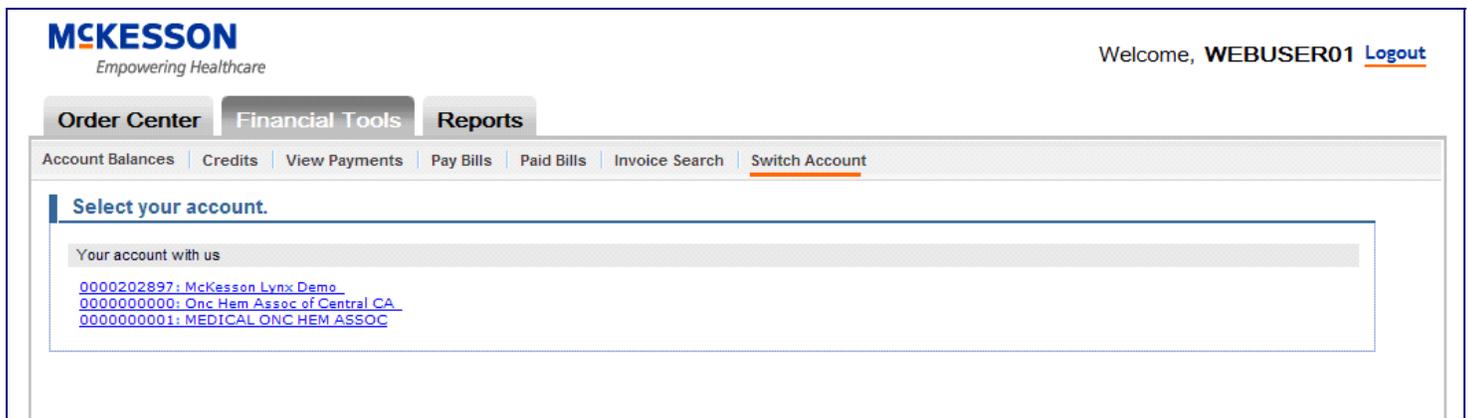
Ship To	Invoice Number	Invoice Amount	Order Number	Invoice Date	Qty	Item	Item Descr
Order			0100379519				
Order	0300435227	2,420.51		12/09/2009			
Order			0100387125				
Order	0300427252	2,542.22		12/01/2009			
Order			0100389116				
Order	0300427253	4,544.46		12/01/2009			
Order			0100389468				
Order	0300427252	179,625.17		12/01/2009			
Order	0300429485	8,897.77		12/02/2009			
Order			0100390038				
Order	0300429485	42,749.82		12/02/2009			
Order			0100391773				
Order	0300431065	15,946.27		12/03/2009			
Order	0300431857	3,813.33		12/04/2009			
Order			0100392873				
Order	0300431857	11,794.65		12/04/2009			
Order			0100393972				
Order	0300433332	58,104.03		12/07/2009			
Order			0100395211				
Order	0300434631	29,833.86		12/08/2009			
Order			0100396316				
Order	0300435227	34,808.21		12/09/2009			
Order			0100396455				
Order	0300435231	3,898.8		12/09/2009			

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Switch Accounts

To view the Financial Tools for another account, click **Switch Account** and select the account you would like to view.



Technical Support

If you have trouble with Financial Tools or need assistance, please contact Technical Support by calling 800.482.6700, Option 4.

Feedback

Mckesson Specialty Care Solutions listens to and responds to customer feedback. All product enhancements are based on ideas generated by users of our products. If you have suggestions regarding our current reporting capabilities or would like to suggest further reporting functionality, please select the [Send Us Feedback](#) option and submit the form.