



Credentials Verification Service

# Team Manager Guide: Managing Your Team and Population

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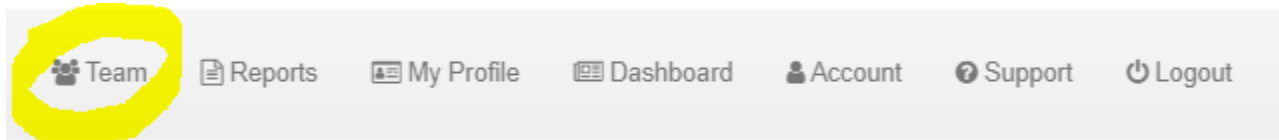
## QUICK START

Follow these steps for Team Managers so you can get going quickly! Feel free to read the rest of the guide for more detailed information.

1. If you are a pharmacist, [claim your Pharmacist Profile!](#)
2. Confirm your “team manager” for your pharmacy/pharmacies by [filling out this form](#). As the owner/manager, you can be the “team manager” or you may designate someone else to serve this role.

### For your designated “team manager”:

1. Look in your inbox for a “Welcome to your Team” email from Pharmacy Profiles.
2. Log in to your account at <https://my.pharmacyprofiles.com/>.
3. Let us know the pharmacists that are employed at your pharmacy. Click “Team” link at the top of the page. You will be taken to the “Team” section, which acts like a control panel for you.



4. Click “Manage Population” link
5. Download the Tracked Population Template and add your pharmacist employees (including you if you are a pharmacist) to the template. Be sure to add NCPDP number, state abbreviation and license number for each.
6. Save the file in a comma-separated values (CSV) format and then upload it.
7. Ask your pharmacists to claim their Pharmacist Profiles. Share this link: [www.pharmacyprofiles.com/pharmacist-profile](http://www.pharmacyprofiles.com/pharmacist-profile)
8. Done!

# Roles

- **Pharmacist:** If you are a pharmacist, you are invited to claim your [Pharmacist Profile](#), a free online tool that will help you manage your professional information.

If you are not a pharmacist, you will just have one role as a **Team Manager** or **Team Member**:

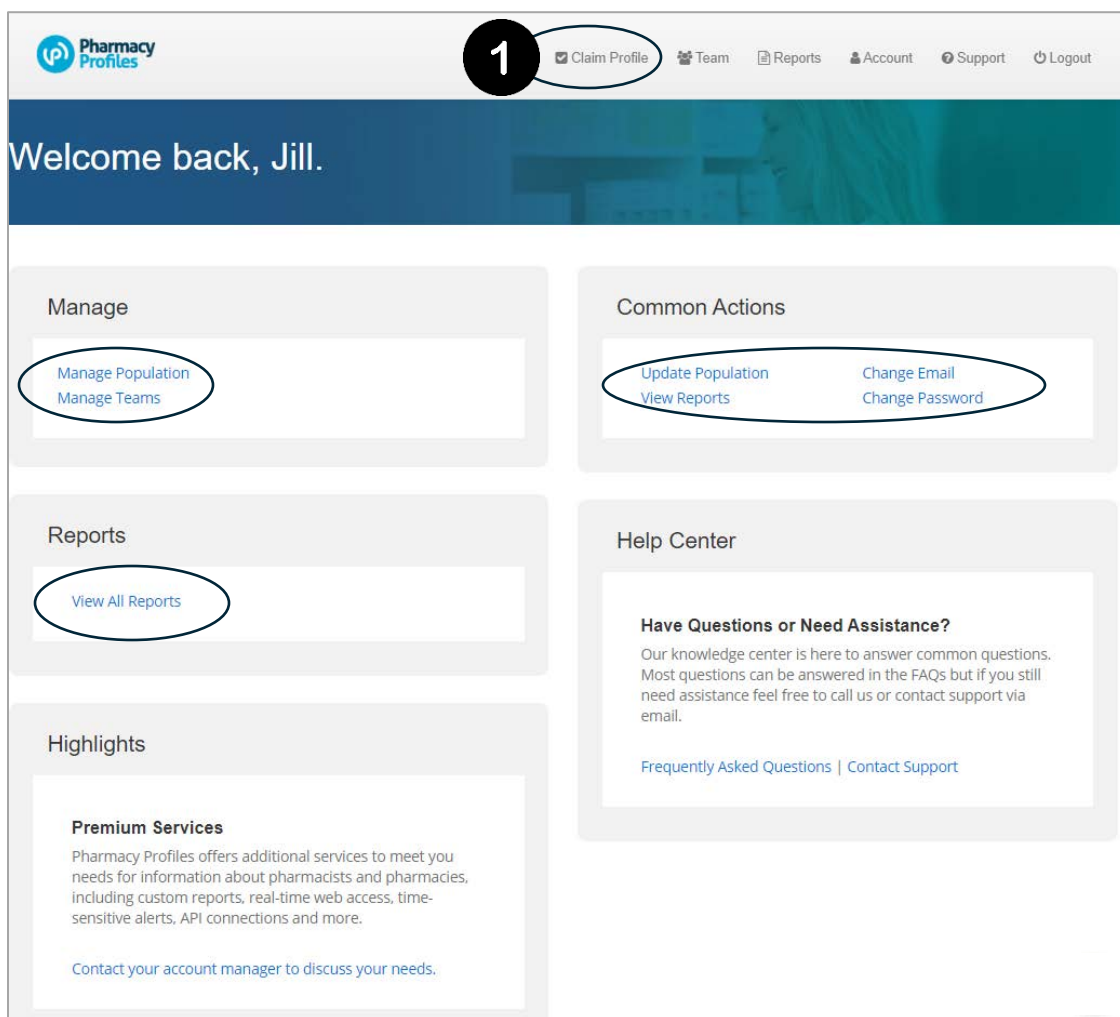
- **Team Manager:** The team manager manages the “team” (your pharmacy or group of pharmacies). You serve as the administrator for your team and as such you do the following:
  - [Manage your team](#) (see below for instructions)
    - Add/remove team members and team managers
    - Send/resend invitation email to team members and team managers
    - Change the role of team members and team managers
  - [Manage your team’s population](#) (see below for instructions)
    - Be responsible for keeping your “population” of pharmacist employees up to date
    - Encourage your pharmacist employees to claim their Pharmacist Profiles
  - [Run reports](#) (see separate Team Guide: Running Reports)
    - Have access to run reports on your pharmacists and pharmacies
- **Team Member:** Team Members are authorized to run reports for their team’s tracked pharmacists (population). They do not have permission to manage the team’s population (e.g. upload new lists of pharmacist employees).

# Definitions

- **Population:** A “population” is the list of pharmacists who are being tracked by the Pharmacy Profiles Credentials Verification Service.
  - Team managers and team members can run reports to access data about their population. A pharmacist must be employed by or somehow affiliated with the Team in order to be part of a Team’s population. For example, a pharmacist employee of Sample Pharmacy would be included in the Sample Pharmacy Team’s population.
- **Team:** A “team” is a pharmacy or group of pharmacies who are grouped for administrative purposes.
  - Each team has five (5) seats for team members and team managers combined. The Pharmacy Profiles Administrator creates the teams as part of your onboarding process.
- **Credentials Verification Service:** Pharmacy Profiles Credentials Verification Service is a single source for quality, verified data on the nation’s pharmacists, including licensure, sanctions, professional credentials, certifications, and other advanced practice training. Our streamlined credentials verification is custom-tailored to the needs of pharmacist employers, health plans, government and other industry leaders to streamline credentials management and monitor pharmacists’ eligibility to provide advanced patient care services.
- **Pharmacist Profile:** A free online tool for pharmacists to manage all of their professional information quickly and easily. Not only will you have a one-stop repository for your information, you will also position yourself to take advantage of emerging opportunities for pharmacists. You will prove you’re qualified to provide – and be compensated for – patient care services. You can document your eligibility to provide these services as mandated by many states and payers.

# Team Control Panel

1. The first team manager will receive an invitation email from Pharmacy Profiles as part of the onboarding process.
2. Log into your account at <https://my.pharmacyprofiles.com/> by entering your email address and password. You will be taken to the “Team” section, which acts like a control panel for management of your team and population (for Team Managers).
  - a. **TIP:** If you are a pharmacist, please use the same email address for your Pharmacist Profile and your Team Manager account. If you have already have created your account, log in and click the “Claim Profile” link on the top of the page (1).
3. View the “Team” section (see screenshot below). You can take many actions from this control panel:
  - a. Manage Population (Keep your population updated with your current pharmacist staff)
  - b. Manage Teams (Add/remove team managers and team members)
  - c. View/run reports
  - d. Change your email
  - e. Change your password



# Manage Team

As a Team Manager, you are responsible for managing your team.

- Add/remove team members and team managers
- Send/resend invitation email to team members and team managers
- Change the role of team members and team managers

## Add/Remove Team Members and Team Managers

1. On the Team Control Panel, Click “Manage Teams.” You will then see the page below (see screenshot).
2. Your team members and team managers will be listed, along with role and status (❶):
  - a. Registered (green rectangle): This means the user received the email invitation and created their account.
  - b. Invited (orange rectangle): This means that the user was sent an email invitation, but has not yet taken action to create his/her account.
3. ADD team member or manager, click on the Invite team member + link (❷). Then enter the person’s email address. Be sure to click the checkbox to designate them as a team manager if desired.
  - a. TIP: All team managers share exactly the same privileges.
4. REMOVE a team member or team manager, click the trashcan icon (❸).
5. EDIT a team member or team manager, click the pencil icon (❸).

Pharmacy Profiles

Claim Profile Team Reports Account Support Logout

teams population

## Teams

A “team” is a pharmacy or group of pharmacies who are grouped for administrative purposes. Each team has a “population” of pharmacists who are being tracked by the Pharmacy Profiles Credentials Verification Service.

Teams are created by the Pharmacy Profiles Administrator. You are a “team member” for your organization which means you are authorized to run reports about your population of tracked pharmacists. Team managers serve as the overall administrator of the team and your team’s population.

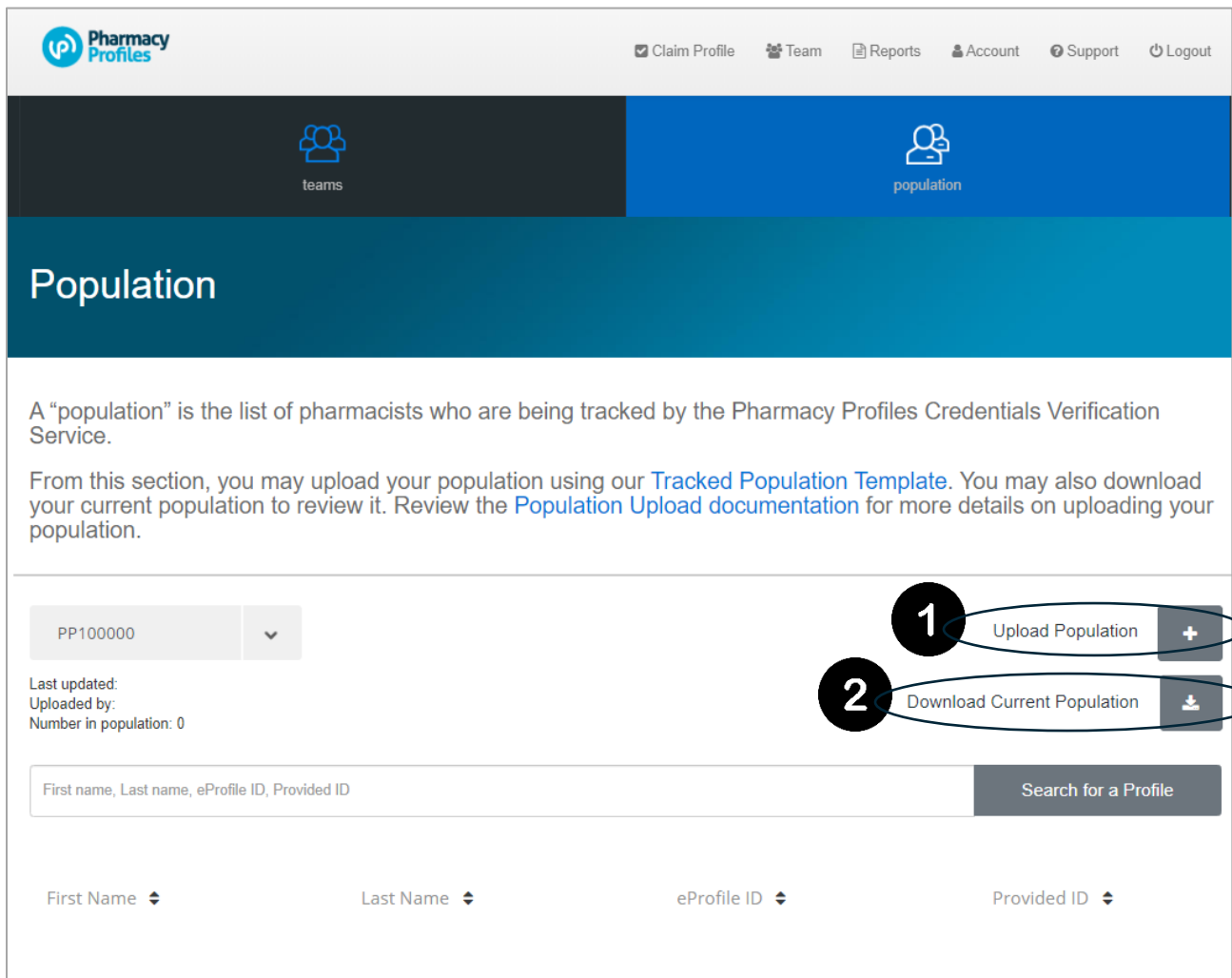
PP100004

Invite team member +

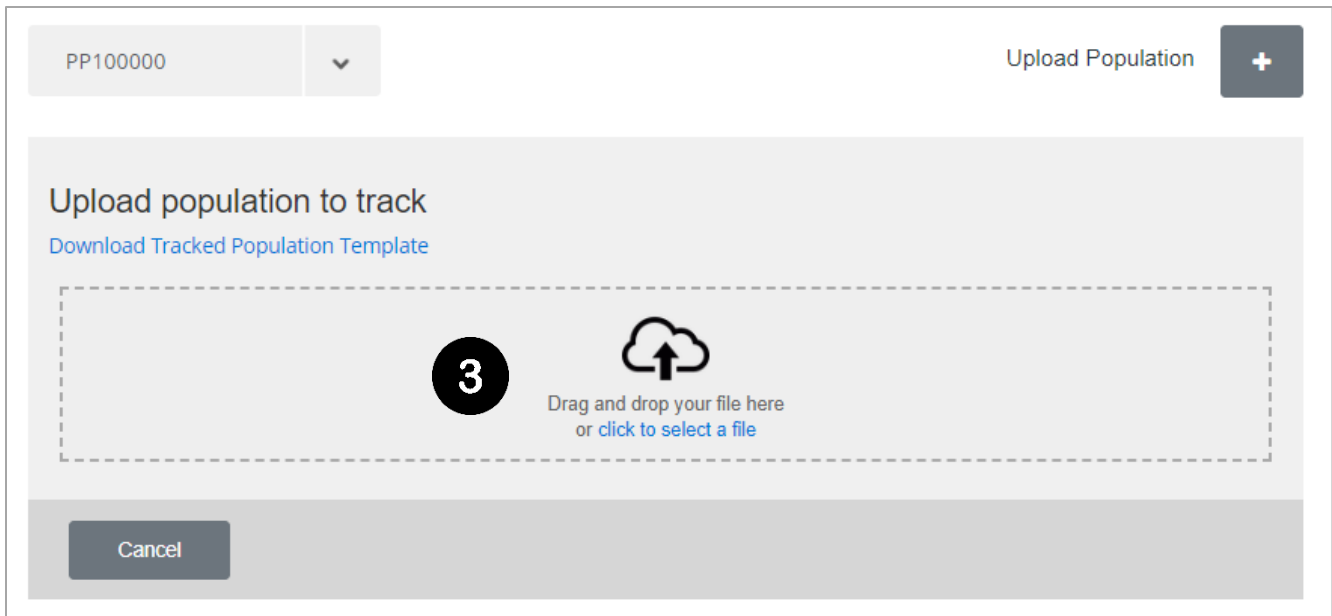
First Name	Last Name	Email	Manager	Status	Actions
Jill	McNabb	team@pharmacyprofiles.com	Yes	Registered	[Pencil] [Trash]
Mary	Sample	a8_pharmacy_manager@pharmacyprofil	Yes	Invited (resend invitation)	[Pencil] [Trash]
Mike	Test	mike_test@pharmacyprofiles.com	No	Invited (resend invitation)	[Pencil] [Trash]

# Manage Population

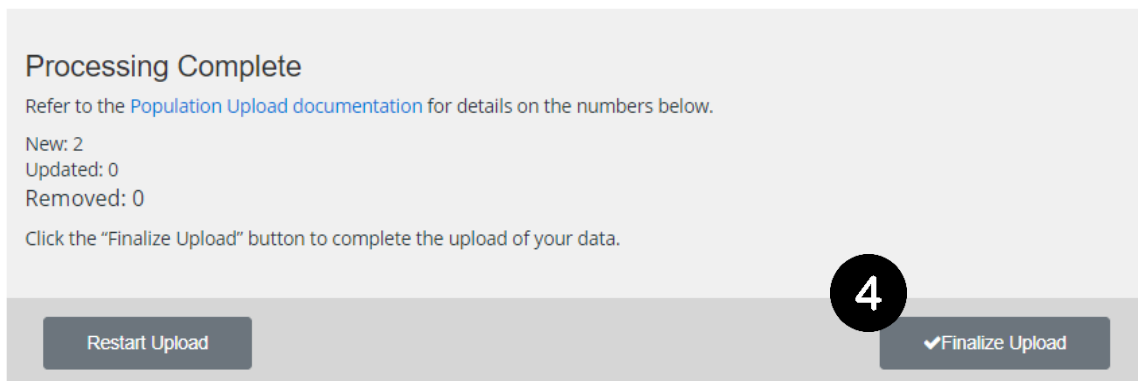
1. On the Team Control Panel, Click “Manage Population.” You will then see the page below (see screenshot).



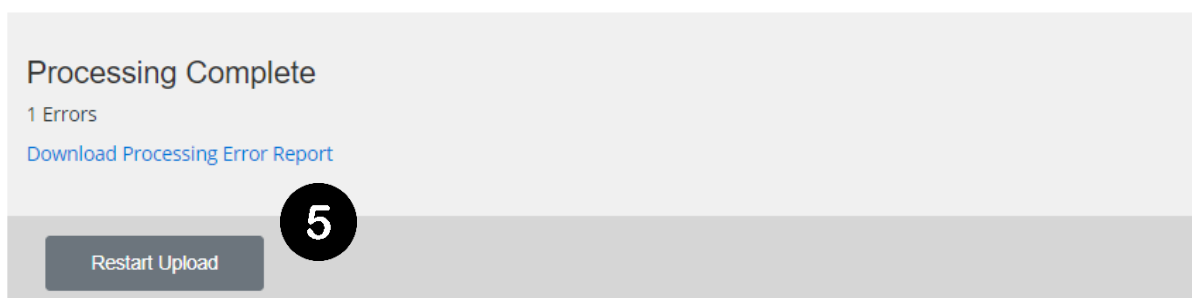
2. To tag your list of pharmacists as part of your tracked population, you must upload the Tracked Population Template. Click “Upload Population” to begin the process (❶).
  - a. If you already have a population, you may choose to Download Current Population (❷) and then edit that document to re-upload.
  - b. Download the Tracked Population Template and add your pharmacists to the template.
  - c. Save the template file in comma-separated values (CSV) format.
  - d. Upload the template file by dragging and dropping it into the dashed-line rectangle or clicking to select a file (❸).
  - e. **TIP:** When you upload a Tracked Population Template, it replaces the previous data. Thus, you must upload your full population each time you need to edit your list of tracked pharmacists. Do not upload partial populations.
  - f. **TIP:** For backup purposes, click the 'Download Population' button so you have a copy of your population list.



3. After you upload the Tracked Population Template, the system will process your file. This can take several minutes to an hour depending on your population size.
  - a. SUCCESS: If the processing of your file was successful, click to Finalize Upload (4). The system will display the statistics of the upload:
    - i. New: number of pharmacists added overall
    - ii. Updated: number of pharmacists whose data was updated
    - iii. Removed: number of pharmacists removed from your population



- i. Once you have corrected the error or removed the data for the pharmacist(s) causing the error, you may click to Restart the Upload (5). This will take you back to the previous screen where you can begin the upload process again.



- After your population has been created/updated, your list of pharmacists will be displayed on the Population page. You may search by name, eProfile ID or Provided ID to find specific pharmacists.

The screenshot shows a web interface for managing a population of pharmacists. At the top left, there is a dropdown menu with the value 'PP100002'. To the right, there are two buttons: 'Upload Population' with a plus icon and 'Download Current Population' with a download icon. Below these, the text indicates 'Last updated: 02/12/2020', 'Uploaded by:', and 'Number in population: 2'. A search bar contains the placeholder text 'First name, Last name, eProfile ID, Provided ID' and a 'Search for a Profile' button. Below the search bar, there are four filter columns: 'First Name', 'Last Name', 'eProfile ID', and 'Provided ID'. A table below these filters displays two rows of data:

First Name	Last Name	eProfile ID	Provided ID
Mary	Test		TestCo5
Susan	Sample		TestCo1

### Tracked Population Template Fields

Data Field	Description	Required?
Person.firstName	First name	Required
Person.lastName	Last name	Required
Person.npiNumber	National Provider Identifier Type 1 (individual) Format: 10 digits	Optional
Person.eProfileId	National Association of Boards of Pharmacy (NABP) eProfile ID	Optional
Person.birthDate	MM/DD/YYYY	Optional
Person.sourceProvidedId	Format: letters/numbers are acceptable. This can be employee ID or any type of ID that would be helpful to you.	Required
License.licenseNumber	License number; Enter only one license number. Format: letters/numbers are acceptable	Required
License.state	Two-letter state abbreviation for the license state. Enter only one state.	Required
PersonRegion.region	Team Manager may define regions (or subsets) for its pharmacists such as districts, geographic groups or other subgroups.	Optional
PersonNcpdp.ncpdpld	NCPDP number or numbers where the pharmacist is employed Format: 7 digits, separate multiple NCPDP numbers with a semicolon, do not use spaces (1234567;7654321)	Required

## Questions, feedback, or issues?

Please contact [support@pharmacyprofiles.com](mailto:support@pharmacyprofiles.com).

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