Veeva Ohio TDDD Webinar Q&A – Jan 30, 2018

General

When did the Ohio TDDD feature in Veeva go live?
This feature was made available as of 17R3 (December 2017).

What is the effort to enable the TDDD license validation functionality in CRM?
The configuration in Veeva CRM is minimal as it requires enabling the new TDDD license fields and making Location/Ship To Location fields available on the call report. The data loading and/or integration to bring in the TDDD license information is the more significant effort.

What are the different potential errors users can see due to the Ohio TDDD validation?

Scenario	Error Message
Displayed when the selected Business Address/location does not have an associated State Distributor #	The selected business address does not have a TDDD #
Displayed when the State Distributor # of the selected business address/location is expired	The TDDD # for the selected business address has expired
Displayed when the State Distributor # of the selected business address/location does not have a valid status	The TDDD # for the selected business address is not valid
Displayed when the Business location does not have State Distributor license for HCP to receive product of selected category	{HCP} is not authorized to receive the selected product {product name} at the selected address

License/Exemption Data

What is the source of the TDDD Licenses?
The license data is available through OpenData or other data vendors. It must be loaded into your CRM org.

Where is the exemption information coming from?
Exemption information would come from either the field users or any internal data maintained on the customer. It is not currently available from data vendors, including OpenData.

Is the TDDD exemption flag on the address linked to OpenData or is it local to our CRM/Network instance only?
The TDDD Exempt flag would be local to your CRM/Network instance only. And this has to be custom mapped if you want it in Network as it is not mapped out of the box.

Where does the Exemption need to be entered, on the address in CRM or Veeva Network?
It can be entered in either location. If you are using Network then the exemption could be loaded there and available for other master data consumers. It could also be captured by users as a DCR in CRM and flow to Network that way.

Managing Exemptions

How do we sample exempt HCPs like a sole proprietor?
The application will check whether the HCO or HCP address has the State Distributor Exempt flag checked. If it is exempt, then the Ohio TDDD validation rules will be bypassed and only the regular sample validation rules will be checked (e.g., valid sample license). However, if the product is category 03, then it cannot be exempt.

Is it possible to manage the exemption attestation in CRM?
There is no specific capability yet to capture an annual attestation, but the product team is aware of this new requirement in Ohio and working on a potential solution. In the meantime, customers can update the disclaimer text for the sample signature to include attesting to an exemption.

Is there a way to have the signature screen indicate that this is an exempt license?
Customers may update the standard disclaimer text for the sample signature to include attesting to an exemption, but it will apply to all sample signatures. It is not configurable per scenario. However, if the OH TDDD validation is bypassed because the HCO or the HCP is exempt, then the State Distributor license information will not display on the signature page.

What is an example of the disclaimer verbiage for the exemption criteria?
We do not have specific examples as customers' verbiage will differ widely and are generally proprietary. In addition, this is typically controlled by compliance departments and as a result, Veeva does not offer example text.

Is it possible to place the TDDD guidance link (www.pharmacy.ohio.gov/PrescriberTDDD) on the signature page only for Ohio addresses? Can a custom signature page be implemented only for Ohio addresses? No, the disclaimer text is set for all signatures and not configurable per location/address.

If exempt, do both the HCO and HCP addresses need to be checked if making an HCP call?
No, the application will stop the TDDD validation process once it finds an exemption on either the HCO or HCP address.

Does the exemption at the HCP address level only impact an individual call? And then also would an HCO exemption apply to both an individual and group call?
Yes, the exemption on an HCP would just apply to an individual call, while the exemption on an HCO account would apply to both individual and group calls tied to that HCO account.

Product Catalog

Is state distributor category a new field on the product catalog?
Yes, this is a new field in the Product Catalog: State_Distributor_Category_vod__c.

If we do not have product categories assigned in the product catalog, will all samples be treated as the "02" category?
Yes, assuming that you also remove field level security to the State Distributor Category field in Product Catalog. Once that is done then the system will automatically categorize the products as Category 02. If it is a controlled substance, then it will automatically consider the product as Category 03. If the user has access to the field and the value is blank, validation will fail and the user will not be able to sample.

Can we drop a category 02 sample to an HCP/HCO with category 03 license?
Yes. Category 03 license allows sampling on category 03, 02, and 01 drugs. Category 02 license allows sampling on category 02 and 01. Category 01 license only allows sampling on category 01.

What happens if the call has samples that contain products which are subject to TDDD and products which are not (e.g., over the counter lotion or medical device)?
Once the TDDD functionality is enabled, every sample product will be subject to the validation. Every product that is not considered category 01 or category 03 should be assigned category 02.

Location and Address Matching

Will all of a person account's parents display in the Location picklist?
Yes, an HCP's parent accounts and affiliated accounts will display in the Location picklist.

On a group call against an HCO, does the HCP need to have the exact address on their record?
No, in a group call against an HCO the address on the call is pulled from the list of HCO addresses so the HCP address is not even an option. There is no need for matching addresses in that case.

What about Address Line 2? Does this have to match?
If the call is against a person account and includes hand samples then the application will match HCP call address to HCO addresses on Address Line 1, City, State, Zip. If Address Line 2 is populated on the HCO Address, then it will be used as a part of the match against the HCP address. If Address Line 2 is not populated on the HCO address, then the match will ignore the field when matching.

Can we sample to a HCP who is not related to any HCO in Ohio? How does the license get validated for HCP alone?
No. OH regulations require that the business where the samples are being delivered has the license. One of the prerequisites is to set up HCO accounts and HCO-HCP relationships in order to use this feature. The only exception would be if this HCP was exempted and so a valid TDDD license would not be required.

What is the impact of enabling the Location field on the call report?
When Location is used on a call against a person account and a detail product is selected, the Call Type is changed to a Group Call if a detail is selected. This was standard behavior even before the Ohio TDDD functionality was made available.

The Location field will be on the call page layout for all calls (all states), but will it only be required for Ohio?
Yes, for sample calls against accounts in Ohio, the user will be required to select a Location. If the call does not include samples, then the Location field will not be required. Also for other states the Location field will not be required on any type of call. During implementation, consider only giving access to the Location field to users who would be sampling in OH.