Retail Portal

User's Guide

Software Release 23.0
Issued May 25, 2011
Supersedes Release 22.0

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Retail Portal User's Guide - Table of Contents

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- Release 23.0

Product Overview

Federal law requires pharmacies to restrict the sale of over-the-counter drugs containing pseudoephedrine (PSE), a key ingredient for producing methamphetamine, otherwise known as “meth”. Tablets containing PSE must be kept in a secure location and can only be distributed by a pharmacist or pharmacy technician. Purchasers are required to provide photo identification as well as their name, address, date of birth, and signature to obtain the tablets.

The Retail Portal solves the compliance challenges facing pharmacies by replacing manual log books with a single nationwide electronic database. This web-based application allows pharmacies with an existing point of sale (POS) application to submit purchase transactions to the Retail Portal, while also allowing pharmacies to print a date range-based transaction log compliant for their state, which can be provided to a law enforcement agency.

The Retail Portal is easy to use. Step-by-step instructions for using the Retail Portal are included in this brief user manual.

Note: Javascript must be enabled in order for the Retail Portal program to function.

Initial Configuration

There are three steps that must be completed to make your Retail Portal program fully operational. Typically, the Pharmacy Administrator completes these tasks.

1. Configure each pharmacy PC used for PSE transactions. (Required)
2. Create user accounts by assigning a User Name and Password for each person that will be using the Retail Portal system. (Required)
3. Define and install the Product List of PSE products. (Required if you do not have an configured product list, otherwise this is optional.)

Step 1 - Configuring Each Pharmacy PC Used for PSE Transactions

The Pharmacy Administrator **must** configure each pharmacy PC that is used for PSE transactions. This **one-time** process is required to ensure that each pharmacy’s data is reported to the correct Appriss Network™ database location. Once you configure each pharmacy PC and create a bookmark for the Retail Portal login program, pharmacy users can then use that bookmark to open the Retail Portal login page.

Note: Appriss provides to the Pharmacy Superuser or Pharmacy Administrator, a Site ID and Pharmacy ID. These are pharmacy specific IDs and must be entered exactly as provided.

To configure a pharmacy PC:

1. Have the Site ID and Pharmacy ID handy.
2. Enter the URL that your Appriss contact or state administrator provided into your browser, press the Enter key and the Retail Portal's Setup screen appears (Figure 1).

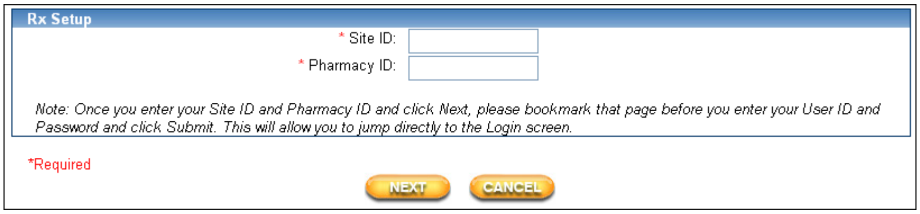


Figure 1: Retail Portal Setup Screen

3. Enter the Site ID.
4. Enter the Pharmacy ID, click **Next** and the Retail Portal login screen appears (Figure 2).
5. Bookmark the Retail Portal login page.

Note: Bookmarking the Retail Portal login page sets up a link so that each time you want to login to the Retail Portal you do not have to go through the setup process to get to the login screen.

6. Enter your User ID and Password, click **Submit** and the Retail Portal opening screen appears (Figure 15 on page 12).

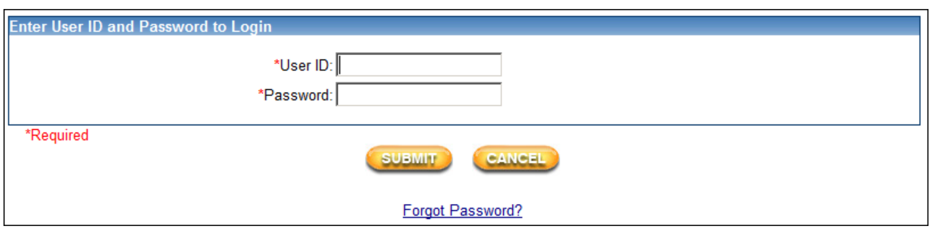


Figure 2: Retail Portal Login Screen

Step 2 - Creating User Accounts

The second step of the initial configuration is for the Pharmacy Administrator to create user accounts for each employee that will be making PSE sales. Users can not log in until an account has been setup for them. See *Creating a User* on page 35 for more information.

Step 3 - Defining and Installing Your Pharmacy Product List

Depending on your site and pharmacy affiliation, one or more of the following screens may appear. See *Adding Products to Your Product List* on page 38 for additional information.

Your Pharmacy Does Not Have Its Own Product List

If your pharmacy does not have a pre-configured product list, then you may want to import a product list from a pharmacy with which you are affiliated (Figure 3).

To add a pharmacy list if your pharmacy does not have a pre-configured list:

1. Click **Yes** and the Product Selection screen appears (Figure 4).

   Note: If your pharmacy does not have a pre-configured list and you select **No** you will have to enter each PSE product individually.

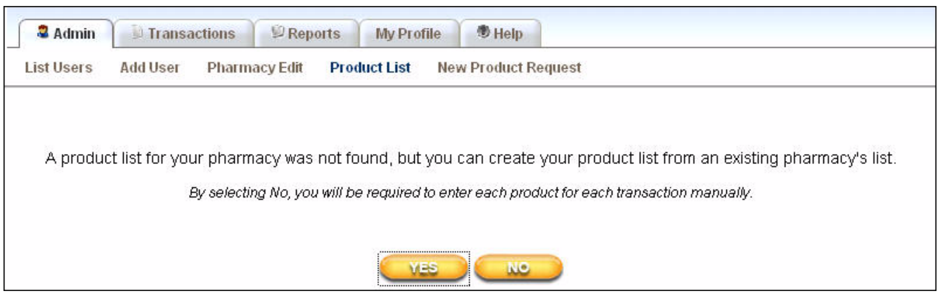


Figure 3: Creating a Product List From Another Pharmacy's List

2. Click the radio-button next to a pharmacy whose product list you would like to import.
3. Click **Next** and the selected Product List is imported for you to edit (Figure 5).

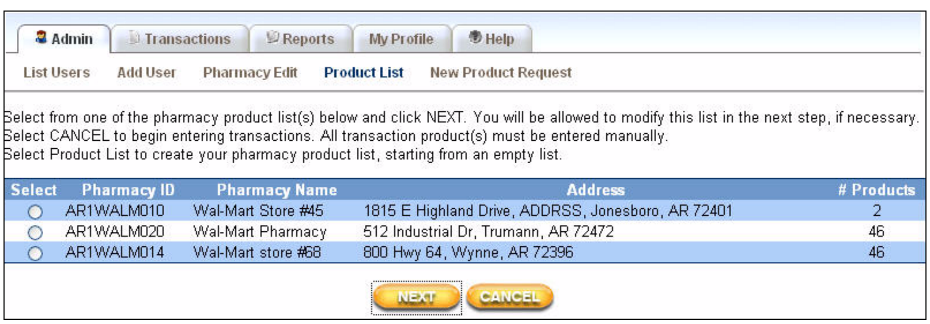


Figure 4: Product Selection List

4. Click the check-box of all non-bold products you want to remove from the **Your Product List** section shown in Figure 5.

   Note: Products in bold are not removable from the list.

5. Click **Remove Selected** to remove these products from the list.
6. From the Master Product List section, begin to enter a product you want to add to Your Product List. Products matching the letters you enter appear in a list and an **Add Selected** button appears.
7. Click the checkbox next to each product you want to add to Your Product List.

8. Click the **Add Selected** button to add the new products to Your Product List.

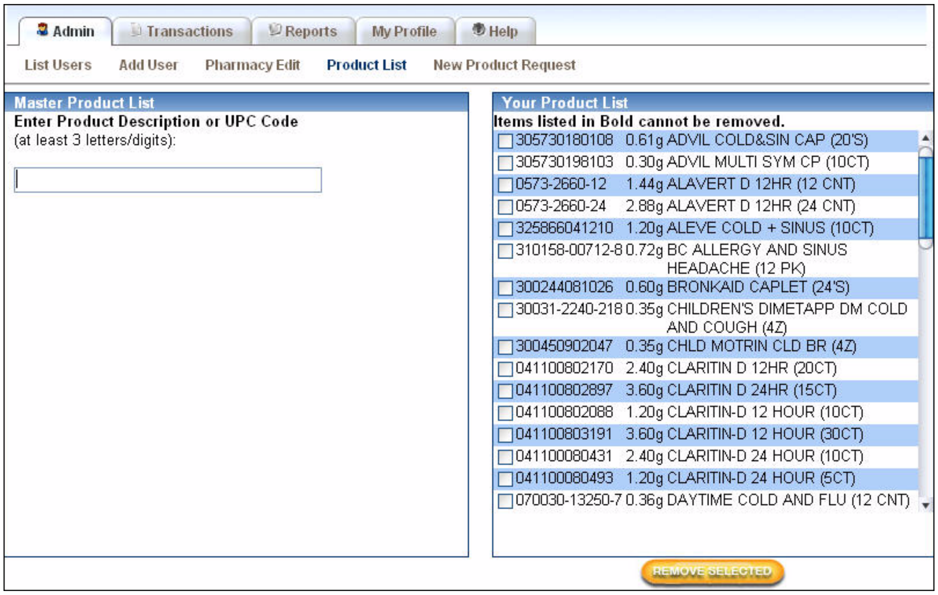


Figure 5: Product List - Adding and Removing Products

Scanner Support File

Scan Monitor is a scanner support file that loads automatically and must be left running for the scanner to operate properly.

IMPORTANT: Do not close or stop this file.

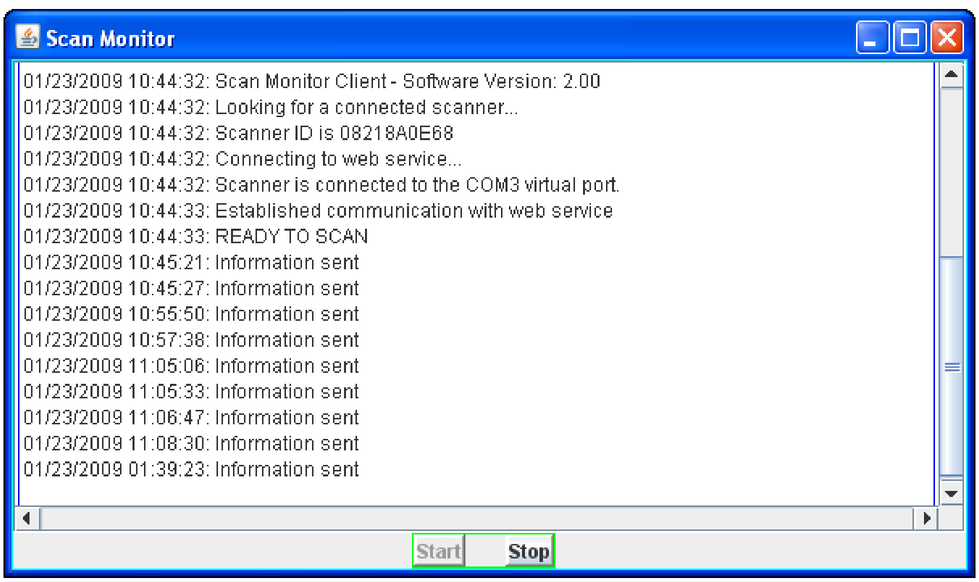


Figure 6: Scan Monitor Screen

Retail Portal Log-in

Once connected to the Retail Portal, the Retail Portal Login screen appears (Figure 7).

To login to Retail Portal:

1. Enter your User ID and Password, **click Submit** and the Create New Transaction screen appears (Figure 15 on page 12).

Note: Once you login, if you have no activity for a limited number of minutes, you will automatically be logged out. This time limit is configured specifically for your site.

Your password will be active for 90 days. One week before that you will be reminded by Email to change your password.

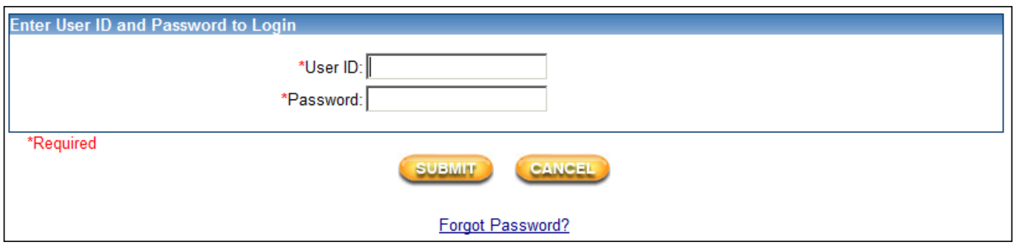


Figure 7: Login Screen

Assigning the Scanner Color for Each Retail Portal Terminal

This section is for pharmacy terminals that use the hand scanner for Retail Portal transactions.

Note: If a pharmacy only has one Retail Portal terminal then the scanner is automatically selected and the **Select a Scanner** drop-down menu does not appear in the Gather Personal Information section of the opening Transactions screen (Figure 15 on page 12).

Note: If your pharmacy has more than one scanner then the **Select a Scanner** drop-down menu appears on the Transactions page (Figure 8). Once you select a scanner the **Select a Scanner** drop-down menu no longer appears.

When each Retail Portal terminal is logged into by a Retail Portal user for the first time of the day or after a reboot, the scanner being used at that terminal must be assigned a color (Figure 8). Each scanner has a different color label (red, blue, green, etc.) to associate that terminal's transactions with its assigned scanner. Example: Terminal #1 - Red, Terminal #2 - Blue, Terminal #3 - Green.

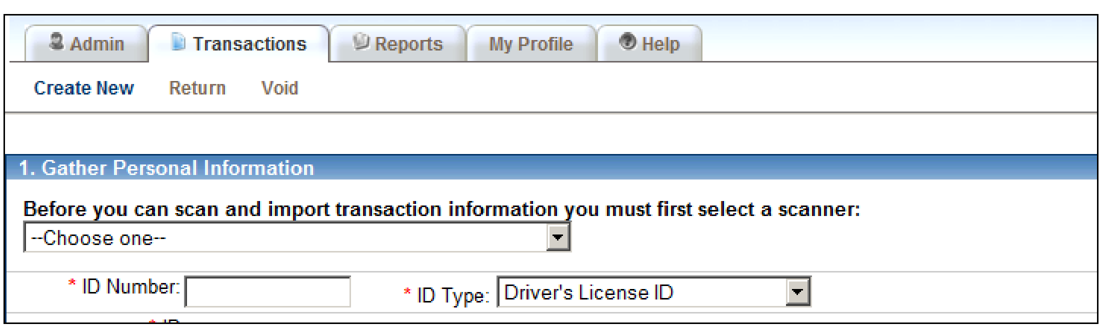


Figure 8: Select Scanner Drop-down Menu

Figure 9: Hand Scanner

Forgot Password

Not all sites have this option, which allows you to reset your password. If the **Forgot Password?** text does not appear at the bottom of the login screen, as shown in Figure 7 on page 9, then your site is not configured for this option. Contact your pharmacy administrator for help.

If you forgot your password:

1. Click Forgot Password in the login screen and Figure 10 appears.
2. Enter your **User ID** and **Email** address and click **Submit** to display the message shown in Figure 11.

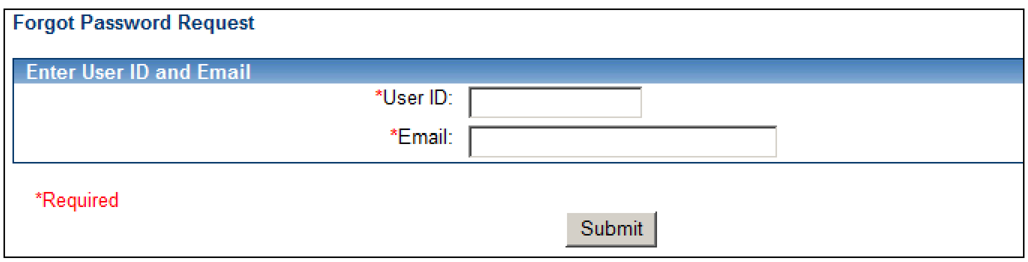


Figure 10: Forgot Password Screen

Note: You will receive an Email (Figure 12) that provides a link that you must either click on to run or, if your Email client is not set up for links, you can cut and then paste the link into your browser's Location Bar. ***This link is only valid for three days.***

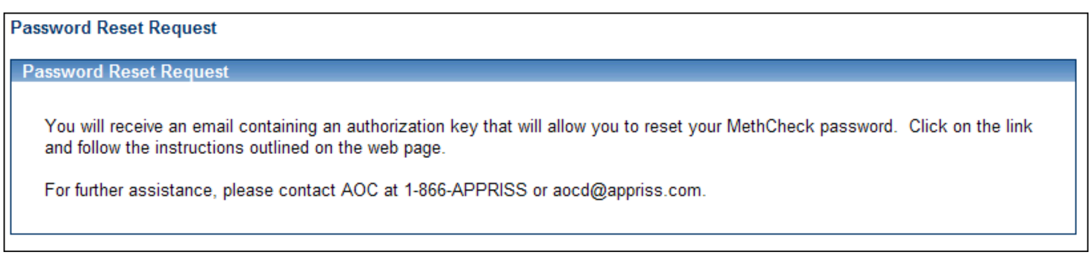


Figure 11: Password Reset Request

3. Once you run the link from your browser the Change Password Security Screen appears (Figure 13).

> A request to reset your password was submitted. Please click the link below or copy and paste the URL text into your browser's Location Bar to finish the password reset process. This link is only valid for three days. https://appriss.com/pharmacy/UserChangePassword_input.do?key=40b5700f348050c36e1def114e46
> If you received this message in error, please delete this email

Figure 12: Email Text

4. Answer the security question.

   Note: The security question is the one you chose when you first configured your user information. Your security question may differ from the example shown here.

5. Enter your new password, then re-enter it.

   Note: The password must be at least 8 characters, including one upper case, lower case, numeral, and special character such as (!, @, $,%, &). Example: **Passwrd8!**

6. Click **Submit** and Figure 14 appears.

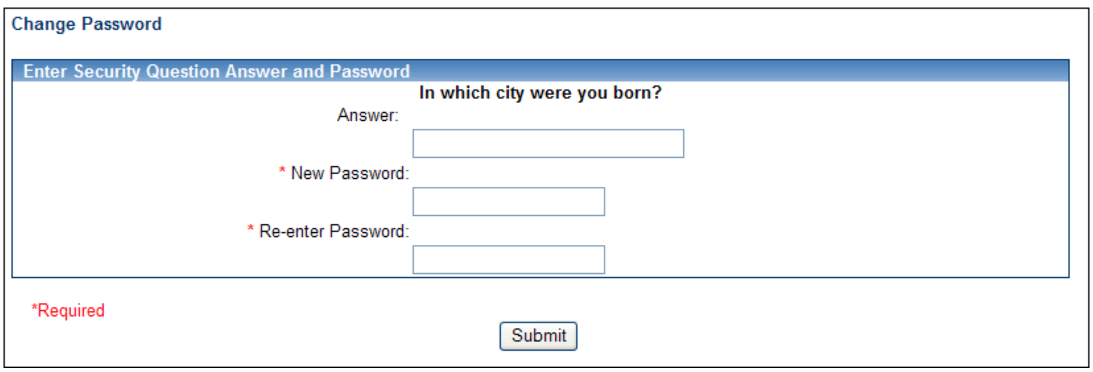


Figure 13: Change Password Security Screen

7. Click **OK** (Figure 14) and the Login screen appears.
8. Enter your User ID and new password.
9. Click **Submit** to login to the Retail Portal.

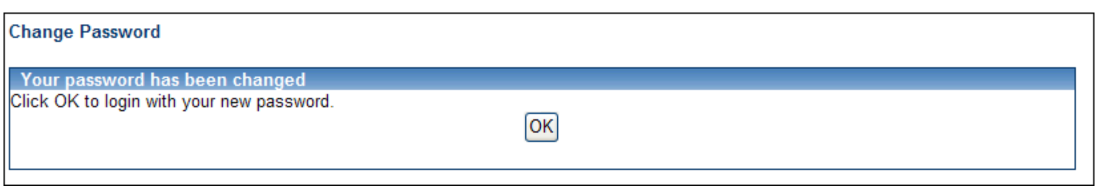


Figure 14: Password Has Been Changed

Transactions Tab

Creating a New Transaction

After successfully logging in, the default Transaction page appears (Figure 15). Each numbered field in Figure 15 is described in the following pages.

Note: If your pharmacy uses the hand scanners then use the drop-down menu that only appears after the initial login to select a scanner color. See <u>*Assigning the Scanner Color for Each Retail Portal Terminal*</u> for more information.

To create a new customer transaction, enter the required information into the fields shown below:

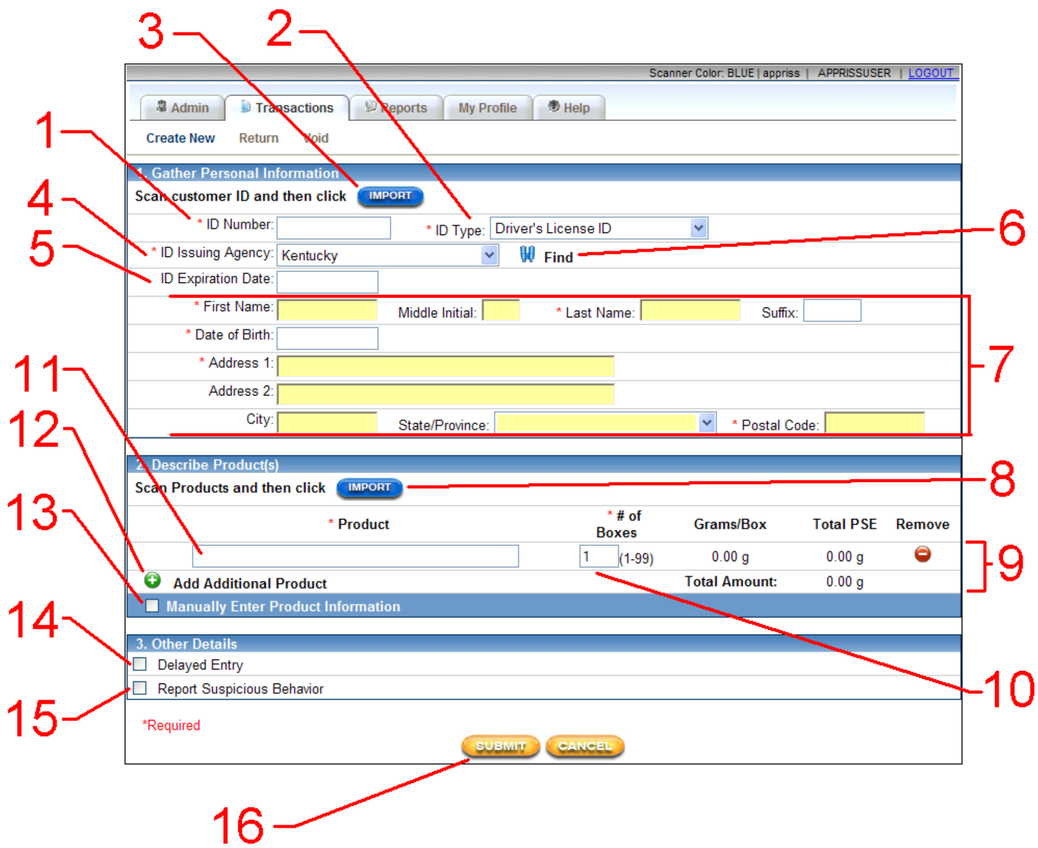


Figure 15: New Transactions

Note: All fields with an asterisk (*) indicate a required field.

The Admin tab appears only if you have been given administrative privileges. This allows an administrator to add, delete, or update user profiles.

Note: Some features are site configurable and appear only if your site is configured for their use.

1. Gather Personal Information Section

Note: Required fields are noted with an asterisk (*).

See Figure 15 on page 12 for the following New Transaction entry field locations.

IMPORTANT: If your pharmacy has a hand scanner and the customer has an ID with a barcode, then scan the ID to populate the personal information section.

1. *** ID Number:** Available on most government-issued identification cards.
2. *** ID Type:** Choose from the drop-down menu. Options may include:
   - Alien Registration Card
   - Driver's License ID
   - Educational/Institutional Issued
   - Military ID
   - Other ID
   - Passport
   - State-Issued ID

   Note: This option list may be shorter, depending on your state and local ordinances.
3. **Import Button**: Scan the customer's ID, then click **Import** to populate the ID information. The Import button only appears if a hand scanner has been configured.
4. *** ID Issuing Agency:** Choose the state from the drop-down menu.
5. **ID Expiration Date**: Enter the ID's expiration date.
6. **Click on the Find icon:** If the customer has previously purchased drugs with PSE that were recorded in the Retail Portal database, the rest of the customer's information automatically appears in the customer information fields.

   The **Find** search requires:
   - ID Number
   - ID Type - Use the drop-down menu to select an ID type.
   - ID Issuing Agency - Use the drop-down menu to select the Issuing Agency.
7. **Customer Information:** If the customer has not previously purchased drugs with PSE, then enter their customer information in the required fields that include:

Table 1: Customer Information

* Last Name	City
* Date of Birth	State/Providence
* Address	* Postal Code
Note: * indicates a required field.	

2. Describe Product(s) Section

See Figure 15 on page 12 for the following New Transaction entry fields:

IMPORTANT: If your pharmacy has a hand scanner then scan the product's barcode to populate the Describe Product(s) section.

Note: If your pharmacy does not have a hand scanner then enter the product information as shown in Steps 9 through 13.

8. **Import Button**: Once you scan the PSE product, then click **Import** to populate the product fields.The Import button only appears if a hand scanner has been configured.
9. Product PSE content and PSE totals:
   - **Grams/Box** shows the total grams of PSE for each box.
   - **Total PSE** multiplies the grams of PSE per box times the number of boxes.
   - **Total Amount** shows the summary of grams for all PSE items for this transaction.

   Note: Clicking the Remove icon, removes the selection from the transaction.
10. *** # of Boxes:** Enter the number of boxes being purchased.

    Note: As you enter the number of boxes, should the total grams of PSE exceed **any** limitations, a red warning message appears above the Gather Personal Information section and the transaction is halted until a legal amount is entered or, if your state allows purchase overrides, the transaction is manually overridden.
11. *** Product:** Begin typing the first letters of the product name or the first few numbers from the UPC and a pick list of PSE products matching your entry appears. Select a product from the list.

    Note: During the initial site configuration, Appriss provides a list of the most commonly purchased products containing PSE. If the site administrator chooses to accept the list then its products are used to populate the site's PSE product list. The pharmacy configures additional PSE products from the Admin tab's Product List option.
12. **Add Additional Product:** If more than one type or brand is purchased, click on the **Add Additional Product** icon. This adds an additional product selection process to this transaction.
13. **Manually Entered Product Information:** If the drug being purchased does not appear in the Product menu, click on the **Manually Entered Product Information** box. Enter the required information manually including:
    - Product Name
    - Quantity of Packages
    - Total Grams PSE

    Note: See *Transactions Tab* on page 12 for specific instructions.

3. Other Details Section

See Figure 15 on page 12 for the following New Transaction entry fields:

14. **Delayed Entry:** If the transaction is entered into the Retail Portal system any time after the purchase was made, click on the **Delayed Entry** checkbox and enter the appropriate transaction date (Figure 16). The Transaction Date can not be in the future.

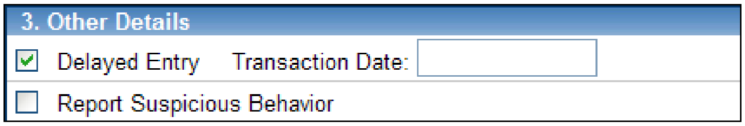


Figure 16: Delayed Entry Transaction

15. **Report Suspicious Behavior:** If the customer attempts to purchase more than the legal limit or shows suspicious behavior, click on the **Report Suspicious Behavior** checkbox (Figure 17).

    Note: Use the **Reason:** drop-down list to select the suspicious behavior type. In the **Detail:** entry box, enter a detailed description of the suspicious behavior.

    Not all states use this feature, so it may not appear.

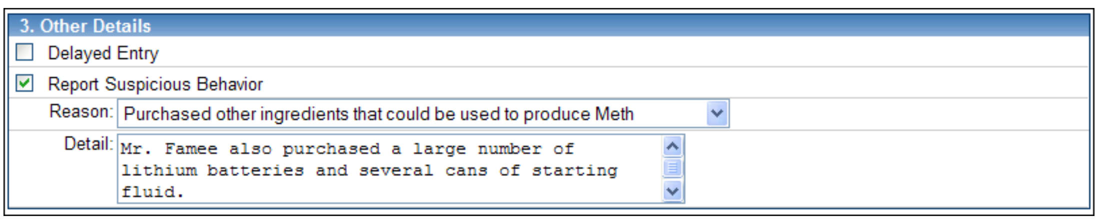


Figure 17: Report Suspicious Behavior

16. **Submit:** Once all required information is entered, click **Submit,** to begin the purchase confirmation process.

Submitting the Transaction

Once all required information is entered you must submit the transaction.

To submit the transaction:

1. Click **Submit.** The Confirm Transaction screen appears (Figure 18).
2. If the information is incorrect, click **Edit** and make any changes.
3. If want to abandon the transaction, click **No** to return to the blank Create New Transaction page. All information is lost and the transaction is not recorded.

4. Click **Yes** to add the transaction to the Retail Portal database.

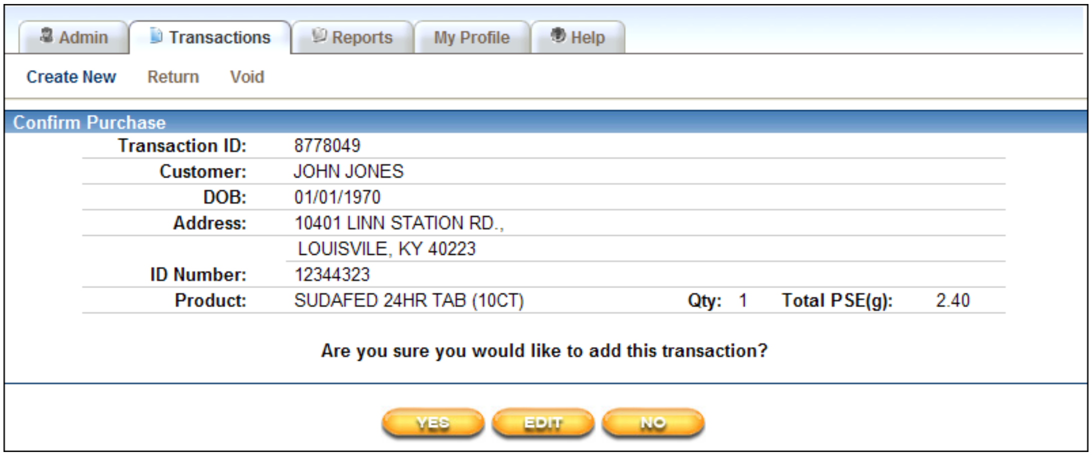


Figure 18: Confirm Transaction

The next screen to appear depends on whether or not your pharmacy has a hand scanning device to scan signature confirmation slips for CMEA compliance. If your pharmacy does not have a scanning device then see *Pharmacies Without Scanning Devices* **on page 18** for more information.

Pharmacies With Scanning Devices

If your pharmacy has a hand scanner then a screen similar to Figure 19 appears when you click the **Yes** button in the screen shown in Figure 18.

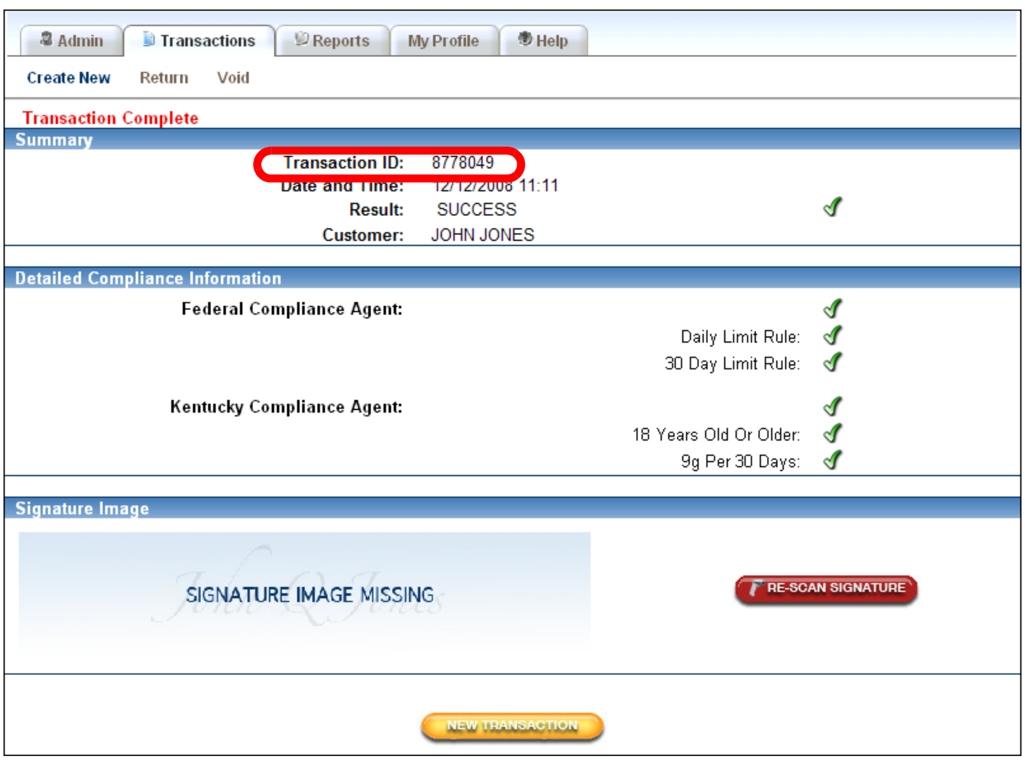
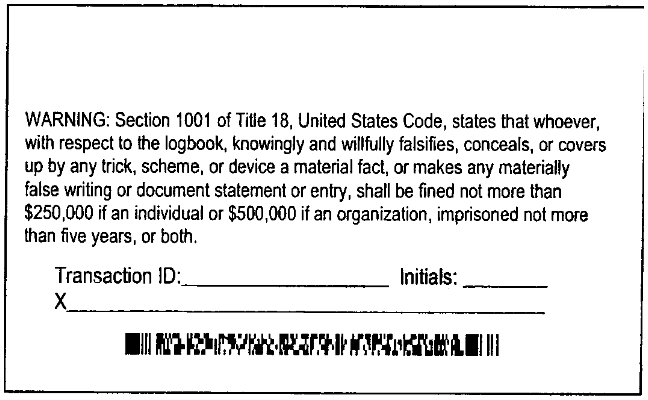


Figure 19: Transaction Summary

1. Have the customer sign the Transaction Signature Slip (Figure 20).


WARNING: Section 1001 of Title 18, United States Code, states that whoever, with respect to the logbook, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device a material fact, or makes any materially false writing or document statement or entry, shall be fined not more than $250,000 if an individual or $500,000 if an organization, imprisoned not more than five years, or both.

Transaction ID:__________________ Initials: ________

X____

Figure 20: Transaction Signature Slip

2. Write the Transaction ID number from the Transaction Summary (Figure 19) on the Transaction Signature Slip.
3. Write your initials on the Transaction Signature Slip.
4. Scan the bar code at the bottom of the Transaction Signature Slip.

   Note: You will hear a confirmation beep when the scanner has recognized the bar code.

When the scan completes its upload, the **Signature Scan Detected** screen appears (Figure 21). This image is saved to the Appriss Data Network™ database.

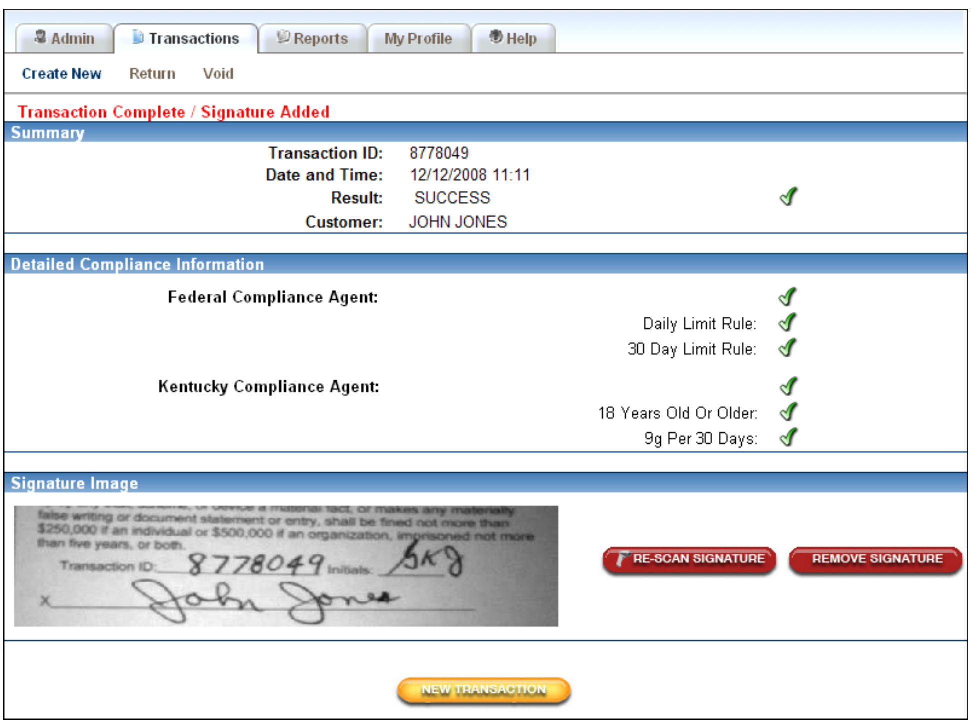


Figure 21: Signature Scan Submission Screen

5. If the signature is legible click **New Transaction** to go to your next sale.

6. If the signature scan is not legible then click **Re-scan Signature** and rescan the slip**.**

Note: The rescanned signature overwrites the previous scan slip.

The electronic signature is saved with the purchase information and now appears in the reports for that day (Figure 22).

7. If the scanner is not working properly, then click **Remove Signature** checkbox to complete the transaction without the signature scan. The purchase information is saved and now appears in the reports for that day.

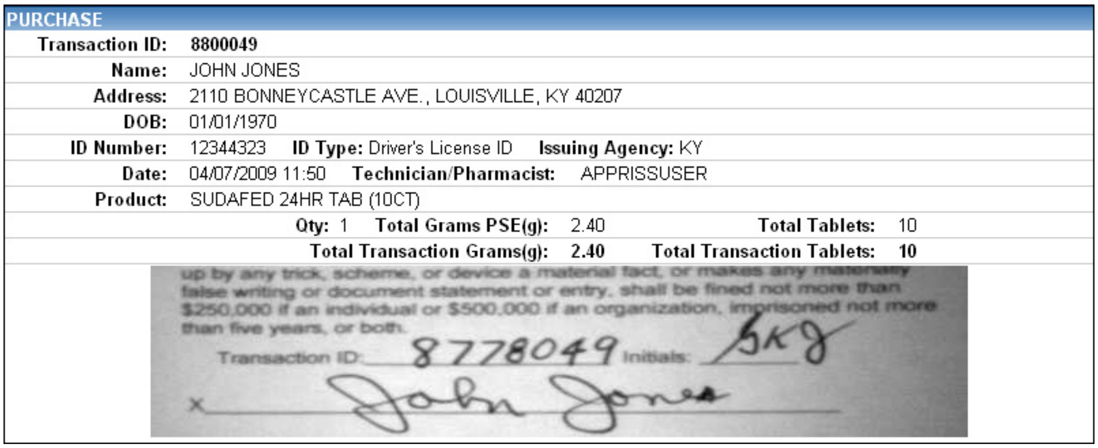


Figure 22: Compliance Detail (With Signature) Report Screen

Pharmacies Without Scanning Devices

If your pharmacy does not have a scanning device, then a screen similar to Figure 23 appears when you click the **Yes** button in the screen shown in Figure 18 on page 16.

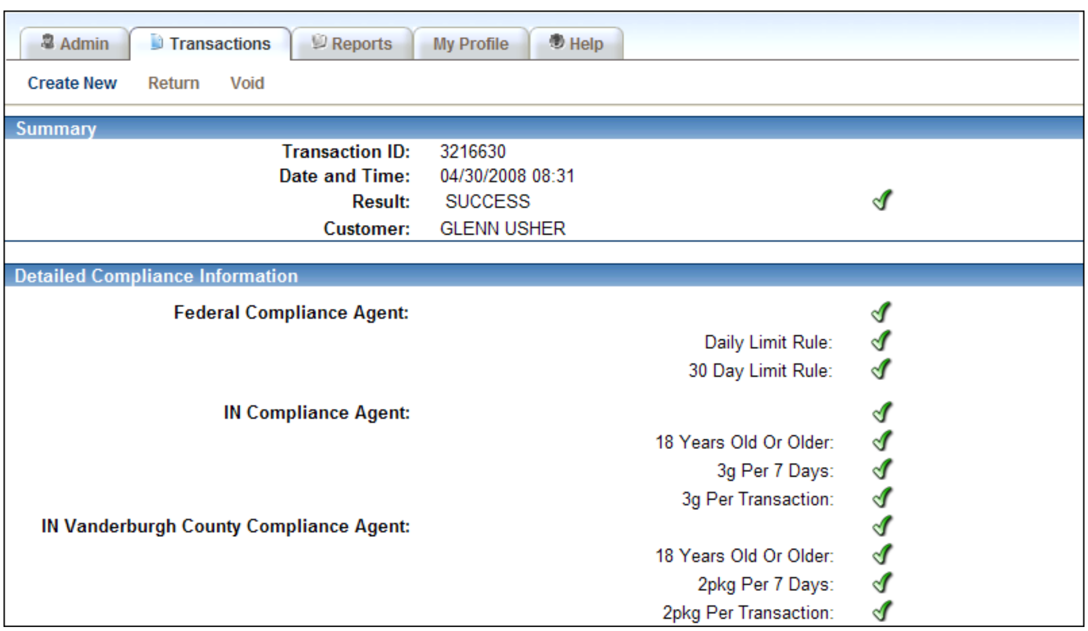


Figure 23: Transaction Summary

Note: The Compliance Information section only appears if state regulations prevent any sale of PSE if the customer has any exceedances, based on Federal/State limits. If your state does not require pharmacies to do the policing part, then the Detailed Compliance Information section will not appear.

Blocked Transactions

In situations where a transaction is not allowed initially, there are four ways to proceed:

1. Change the purchase, if possible, to meet all purchase requirements. (Fewer boxes, lower dosage, etc.)
2. Deny the transaction.
3. Deny the transaction and, if a support process is in place, provide the customer with the transaction number and the support contact information.

   Note: Some pharmacies have a support phone number or web site to explain to the customer why their transaction was denied. See *Support for Blocked Transactions* on page 20 for more information.

   Depending on the particular setup for each state using the Retail Portal, the support number provided to the customer when he or she is denied will vary

4. Override the transaction. See *Overriding a Transaction* on page 21 for more information.

Note: The red check marks shown in Figure 24 show that the purchase was allowed, but it failed compliance in the noted areas. The Result was a Purchase Override - (purchase was allowed, but compliance failures were detected).

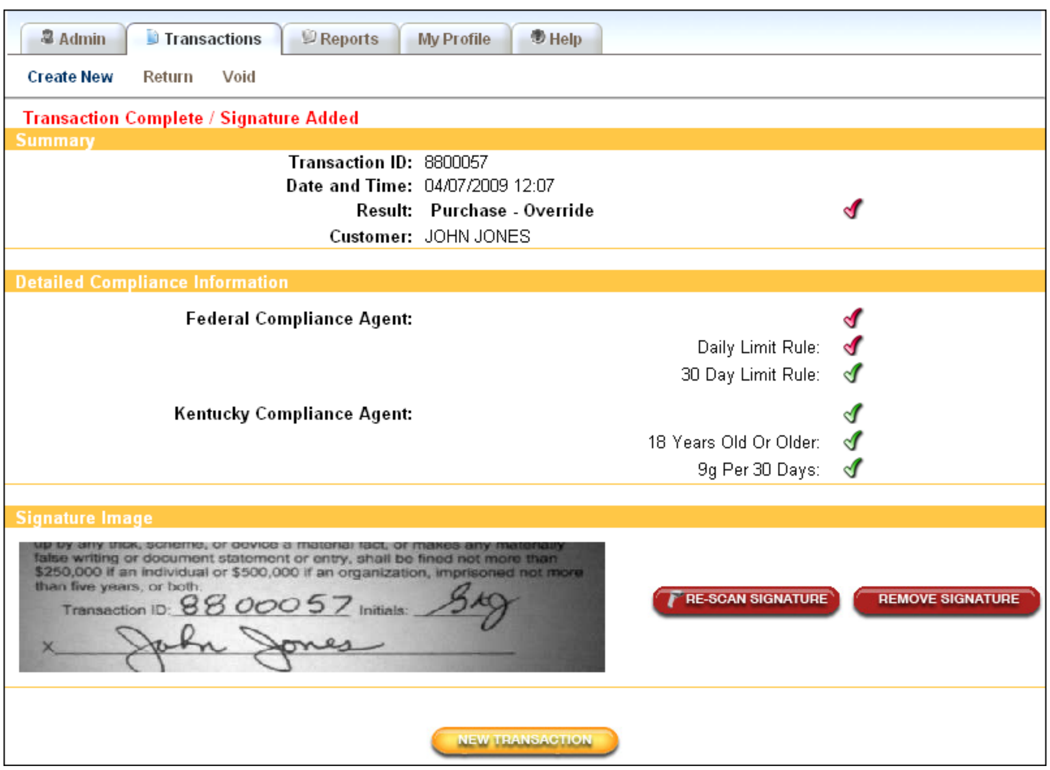


Figure 24: Blocked Transaction Overridden

Support for Blocked Transactions

For states or agencies that provide support for blocked transactions, an icon appears after the Transaction ID number (Figure 25). Clicking on this icon opens a screen that provides your state's or agency's support information (Figure 26).

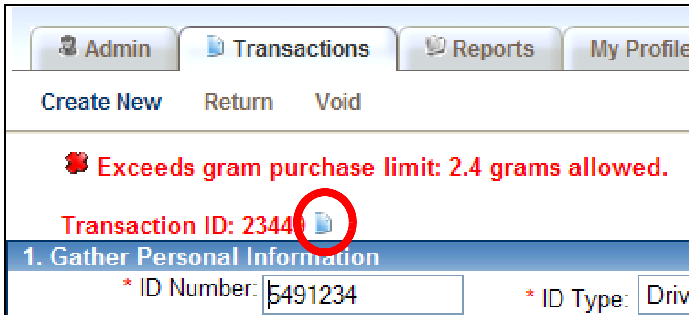
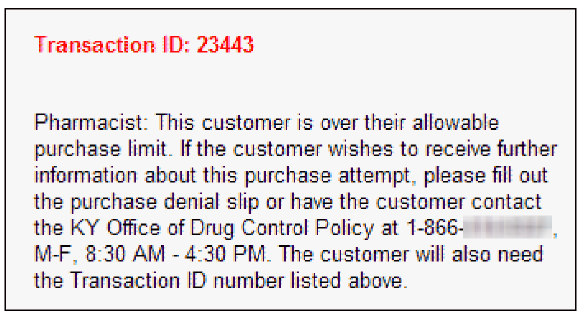


Figure 25: Blocked Transaction

Figure 26 shows an example of a blocked transaction slip which provides the customer a means to find out additional information concerning the blocked transaction.



Transaction ID: 23443

Pharmacist: This customer is over their allowable purchase limit. If the customer wishes to receive further information about this purchase attempt, please fill out the purchase denial slip or have the customer contact the KY Office of Drug Control Policy at 1-866-[illegible], M-F, 8:30 AM - 4:30 PM. The customer will also need the Transaction ID number listed above.

Figure 26: Example State Support Information

Overriding a Transaction

There may be times when, for safety reasons, a transaction that exceeds the customer's purchase limits needs to be overridden. The only reason a purchase should ever be overridden if for the safety of the pharmacy staff.

Note: Overridden transactions still appear in the reports.

To override a transaction:

1. If you submit a transaction and a transaction warning appears (Figure 27) and you feel there is a situation that requires an override, click **Override** and Figure 28 appears.

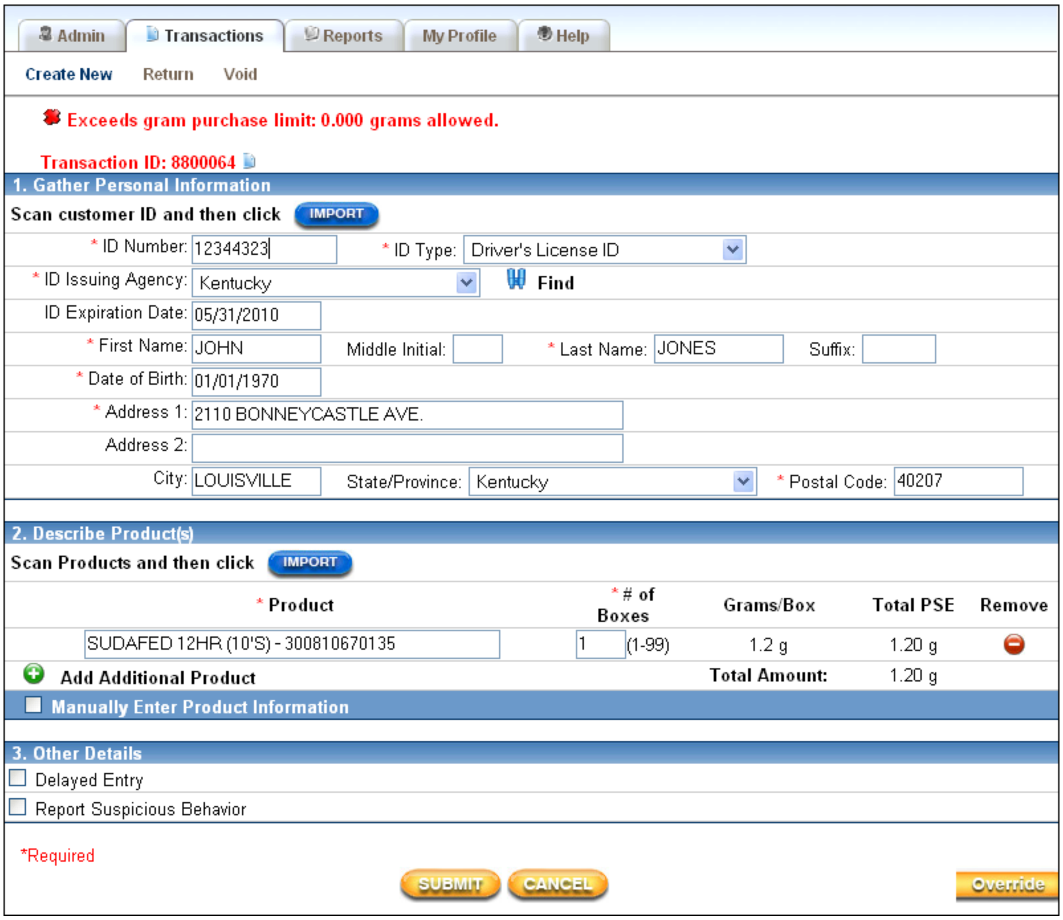


Figure 27: Transaction Warning Before Override Button Is Clicked

2. Click **Yes** and the Transaction Override Confirmation screen appears (Figure 29).

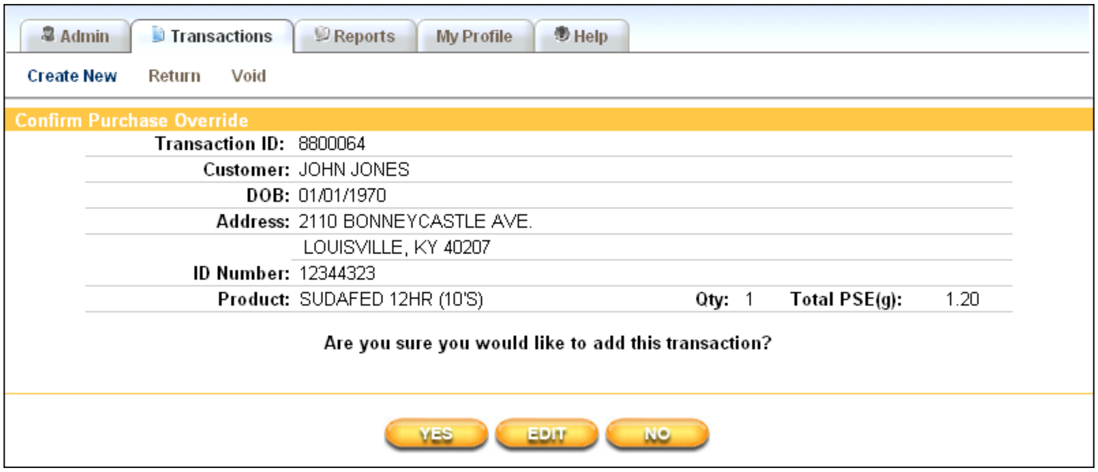


Figure 28: Confirm Purchase Override

Note: If the scanner is not working your transaction is complete.

3. Scan the signature slip and click **Re-scan Signature** and Figure 30 appears.

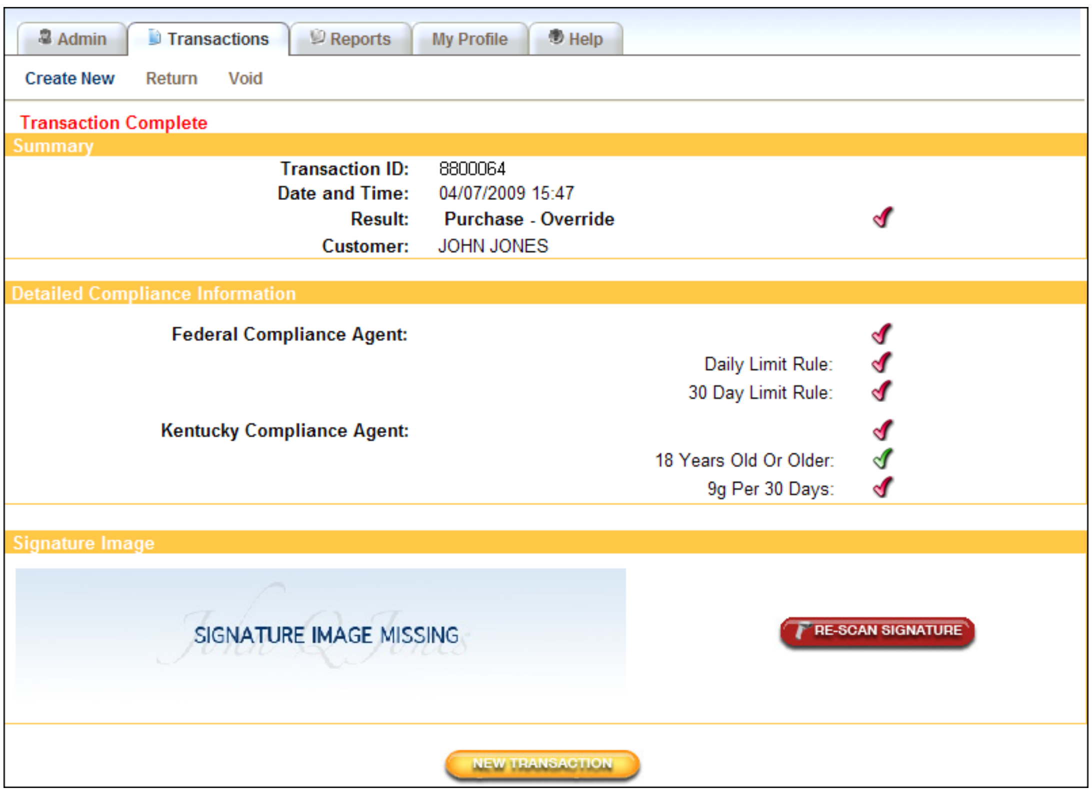


Figure 29: Transaction Complete Screen

Note: This completes the transaction.

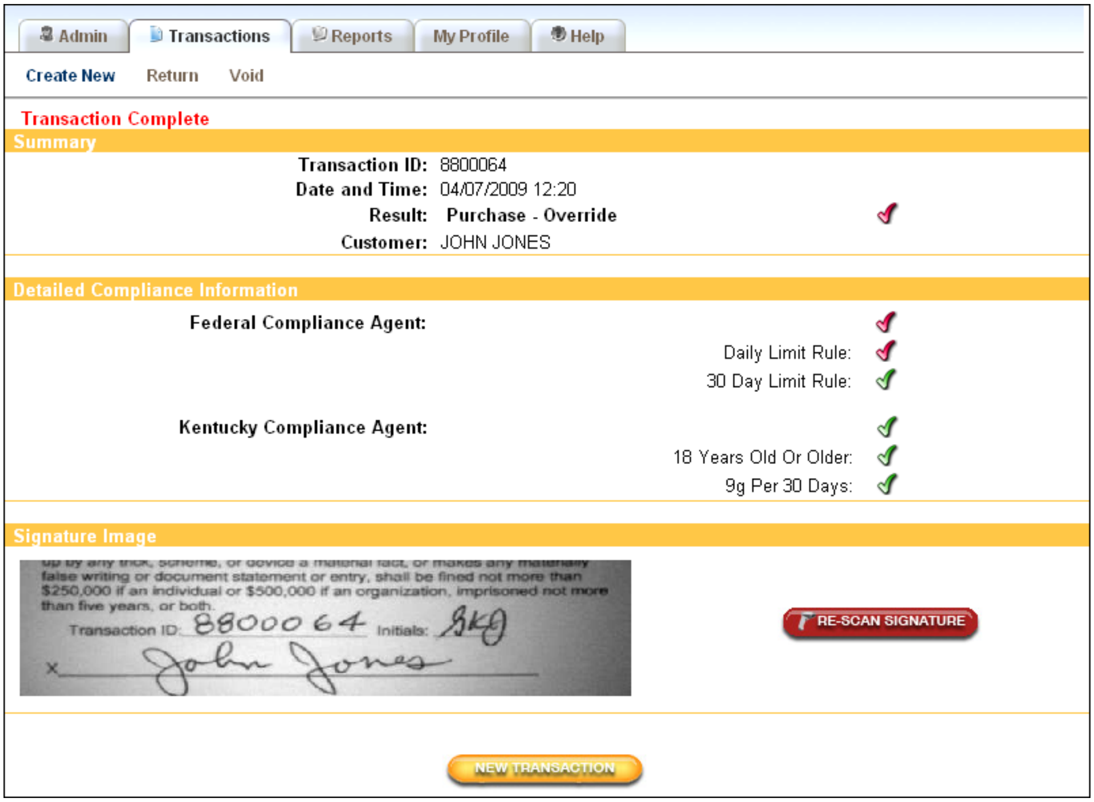
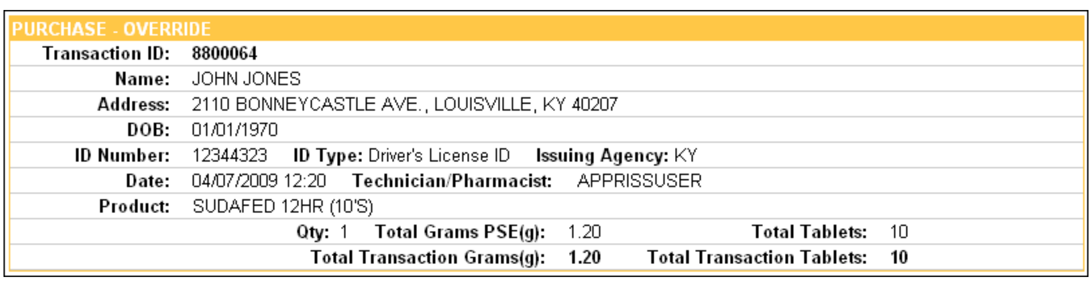


Figure 30: Transaction Results

Note: Figure 31 shows the resulting transaction as it would look in a transaction report.



PURCHASE - OVERRIDE					
Transaction ID:	**8800064**				
Name:	JOHN JONES				
Address:	2110 BONNEYCASTLE AVE., LOUISVILLE, KY 40207				
DOB:	01/01/1970				
ID Number:	12344323 **ID Type:** Driver's License ID **Issuing Agency:** KY				
Date:	04/07/2009 12:20 **Technician/Pharmacist:** APPRISSUSER				
Product:	SUDAFED 12HR (10'S)				
	Qty: 1	**Total Grams PSE(g):**	1.20	**Total Tablets:**	10
		Total Transaction Grams(g):	**1.20**	**Total Transaction Tablets:**	**10**

Figure 31: Transaction Override As It Appears In A Transaction Detail Report

.

Returns

Typically, the Return function is used when the Transaction Number is unavailable or the purchaser is returning only a portion of a previous purchase.

To initiate a return transaction:

1. From the Transactions tab, click **Return.** The Return Transaction screen appears (Figure 32).
2. Enter all information, just as you would in a purchase transaction.
3. Click **Submit** to credit the purchaser for the returned PSE content.

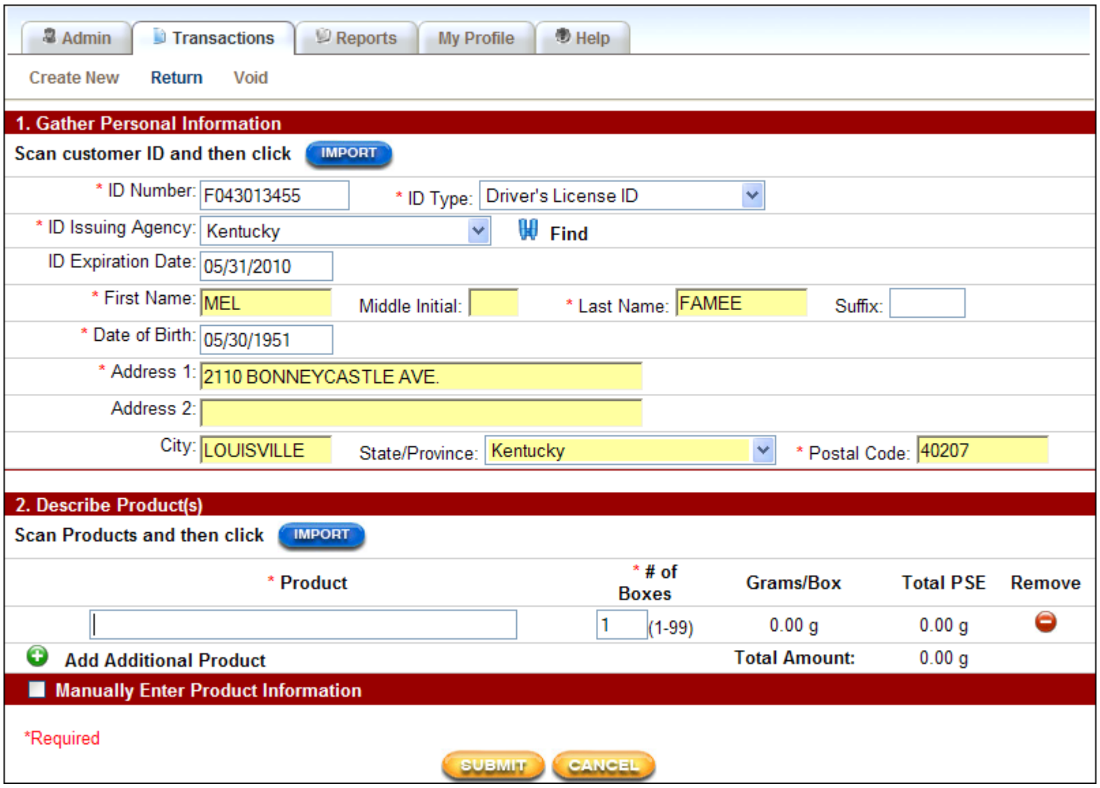


Figure 32: Return Transaction

Voiding A Transaction

Note: Only Pharmacy Managers or higher user roles can void transactions.

To void a transaction:

1. Click **Void** in the Transaction tab header. The **Enter Transaction ID Number** screen appears (Figure 33).
2. Enter the transaction number, click **Submit**. The **Confirm Void of Transaction** screen appears with the purchaser's information and product information (Figure 34).

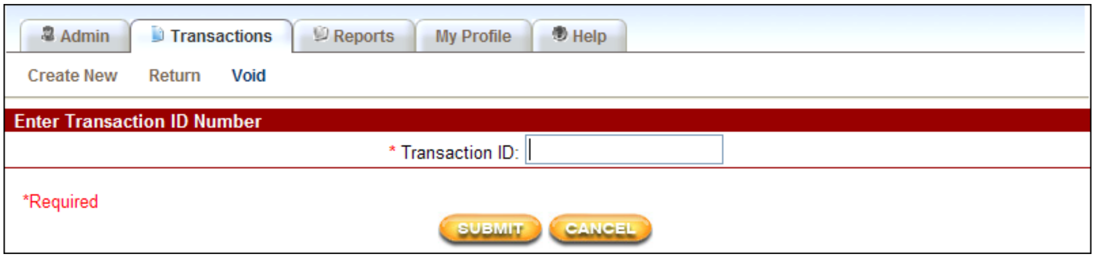


Figure 33: Void - Enter Transaction Number

Note: Some pharmacy roles require a supervisor override to void a transaction. If this is the case, a screen appears and requests a user name and password for the Pharmacy Manager authorized to void a transaction.

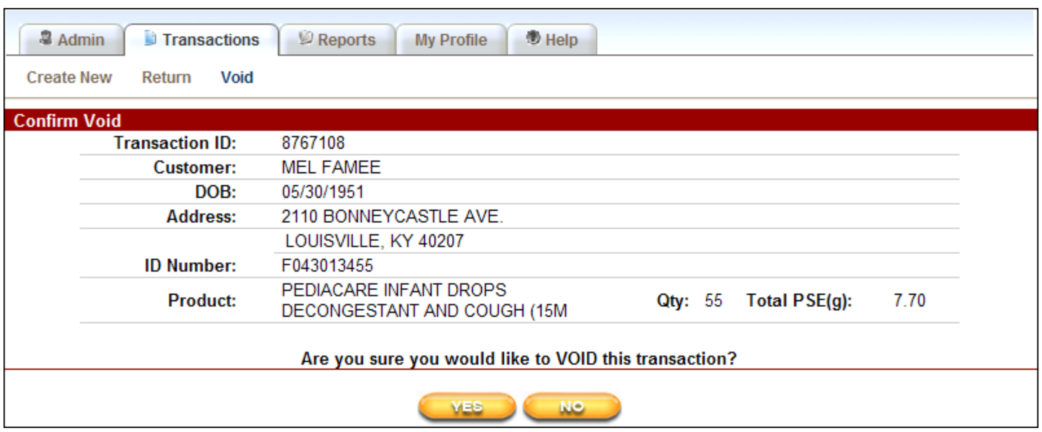


Figure 34: Void Confirmation

3. Click **Yes** to confirm the void. The **Transaction Voided** screen appears (Figure 35).

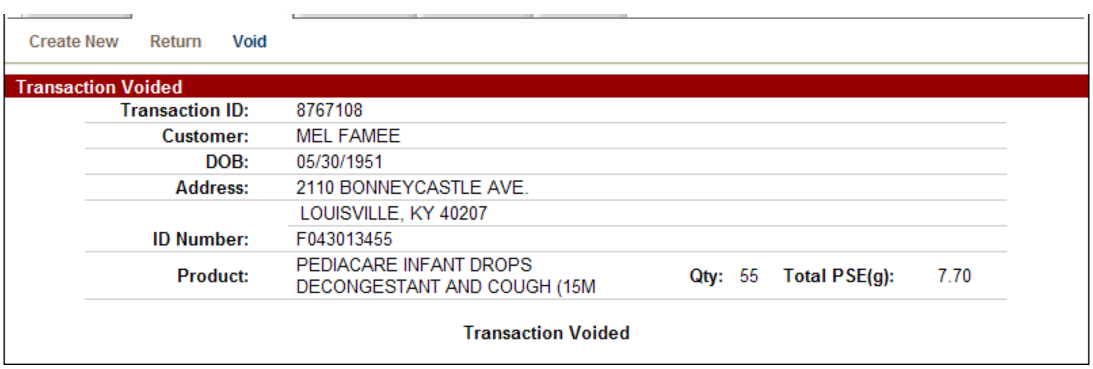


Figure 35: Transaction Voided

Reports Tab

There are three types of reports available:

- Transaction Summary Report
- Transaction Detail Report
    - Transactions
    - Voids
    - Returns
- Compliance Detail (with signature) Report

Transaction Summary Report

Transaction Summary reports provide a list of transactions, based on a date range you enter.

To initiate a Transaction Report:

1. From the Reports tab, use the Report drop-down menu to select **Transaction Summary.**
2. Use the drop-down calendar menus to select the report's From Date and To Date.

   Note: Click the **Specify Time** checkbox to add a time factor to the search criteria.
3. Click **Submit.** The Transaction Summary Report appears (Figure 37 on page 27).

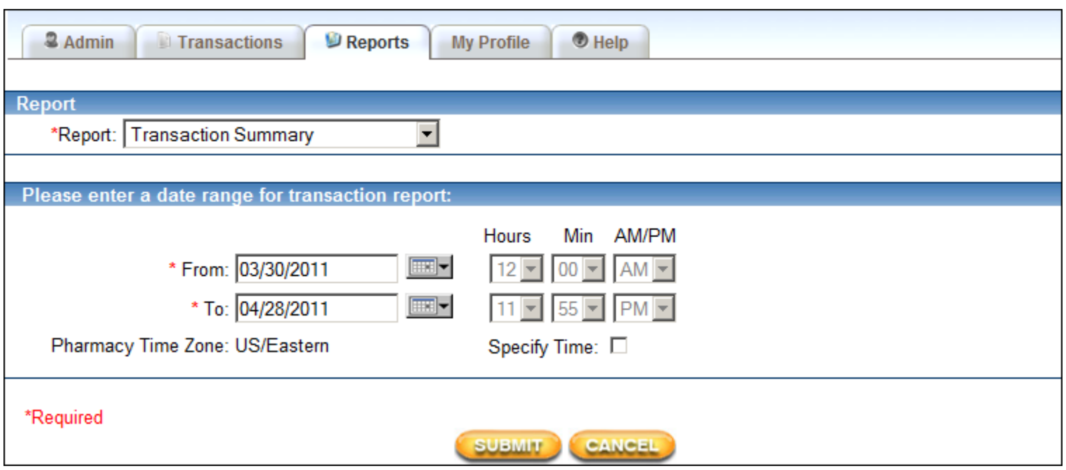


Figure 36: Transaction Summary Report Entry Screen

Figure 37: Transaction Summary Report

Transaction Detail Report

Transaction Detail reports provide a list of transactions with additional details, based on a date range you enter.

To initiate a Transaction Detail Report:

1. From the Reports tab, use the Report drop-down menu to select **Transaction Detail.**
2. Use the drop-down menus to select the report's From Date and To Date.

   Note: Click the Specify Time checkbox to add a time to the search criteria.
3. Click **Submit.** The Transaction Detail Report appears (Figure 38 on page 28).

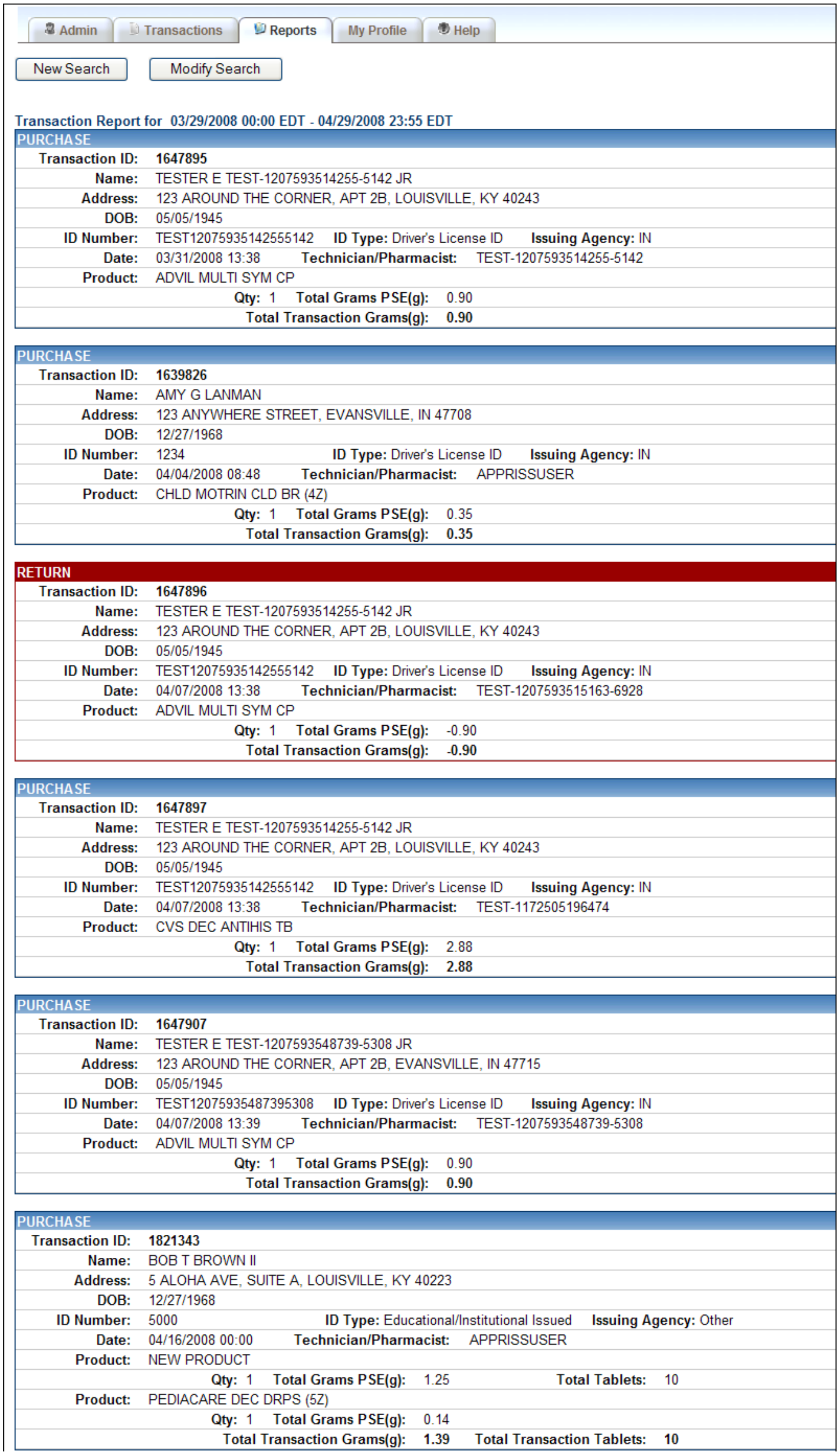


Figure 38: Transaction Detail Report

Compliance Detail Reports

Compliance Detail Reports prove a list of successful transactions, signature slips for scanned transactions, voided transactions, and purchase overrides for the date range you enter.

To initiate a Compliance Detail Report:

1. From the Reports tab, use the Report drop-down menu to select **Compliance Detail (with signature)**.
2. Use the Date Range drop-down menus to select the report's From Date and To Date.

   Note: Click the Specify Time checkbox to add a time to the search criteria.

3. Click **Submit.** The Compliance Detail Report appears (Figure 39).

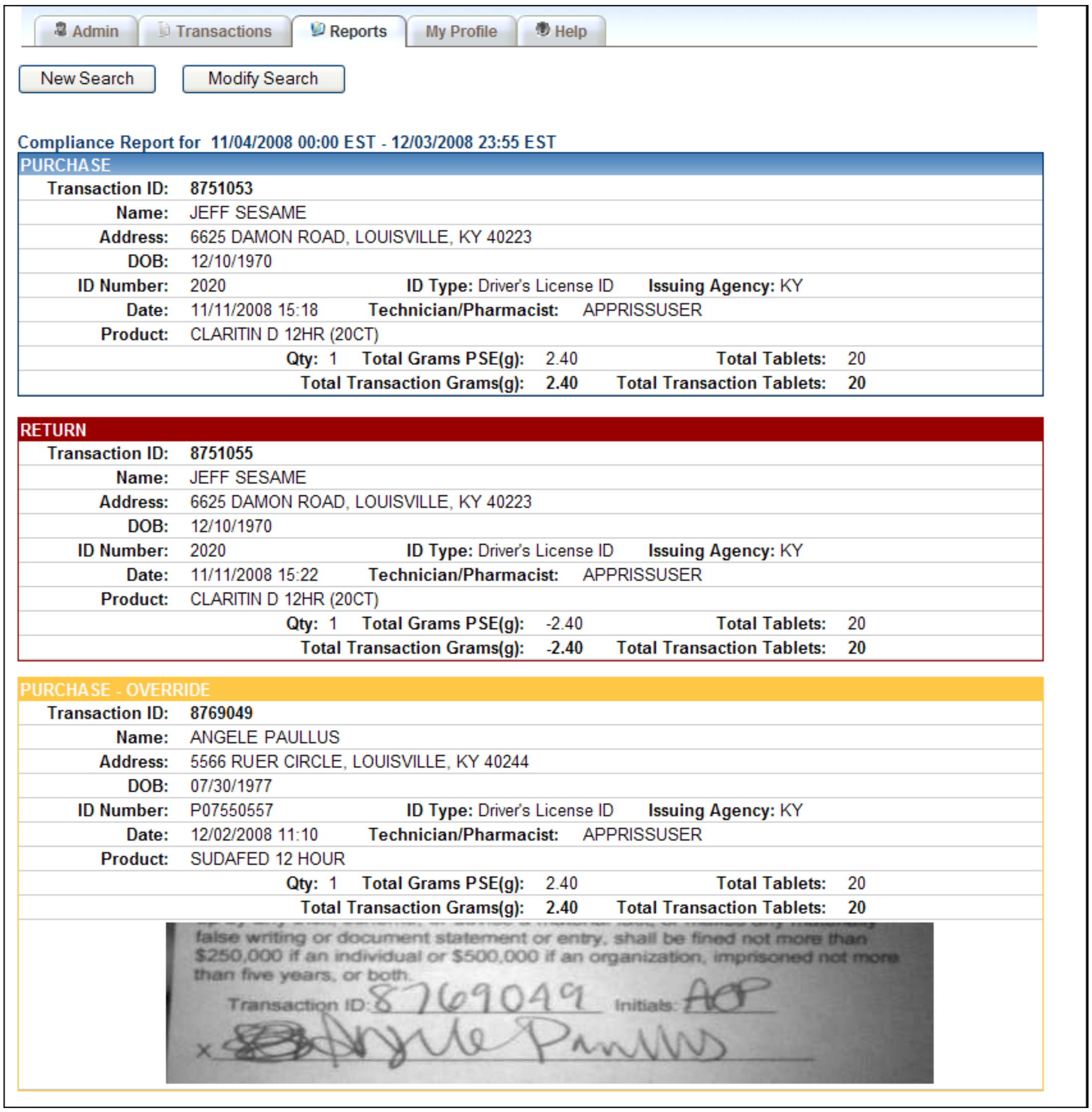


Figure 39: Compliance Detail Report

My Profile Tab

The My Profile tab allows you to change your name and contact information and, if your site supports this feature, change your password. A new security feature requires you to select a security question and provide an answer to that question.

My Profile

Figure 40 shows the My Profile screen where you can edit your personal information and enter your security question and answer.

To edit your profile information:

1. Make any changes to your profile information.
2. Select a security question.
3. Enter the answer to that question.
4. Click **Save** to accept the changes.

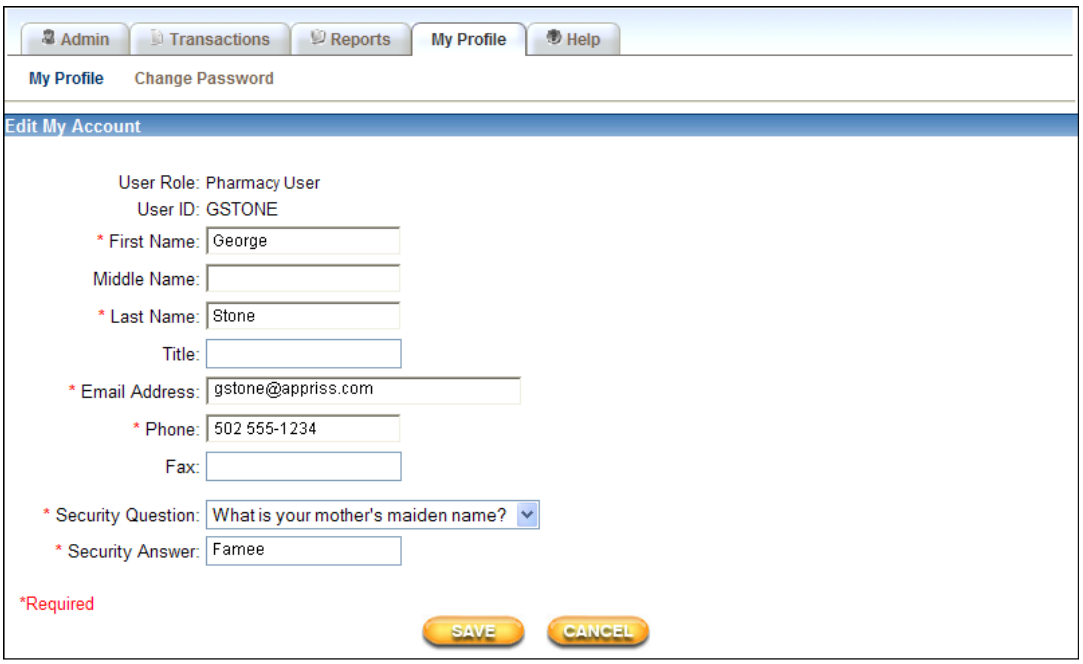


Figure 40: My Profile

Change Password

Not all sites have this option. If the **Change Password** option does not appear in the **My Profile** tab's screen as shown in Figure 41, then your site is not configured for this option. Contact your pharmacy administrator for help.

Note: The password must be at least 8 characters, including one upper case, lower case, numeral, and special character such as (!, @, $,%, &). Example: **Passwrd8!**.

The password can not be the same as the User ID.

The password can not be any of the last three passwords you have used for the Retail Portal.

To change your password:

1. From the My Profile tab, click **Change Password** and Figure 41 appears.
2. Enter your New Password.
3. Enter your New Password again.
4. Click **Submit** to save the new password.

Note: The next time you log in the new password is required.

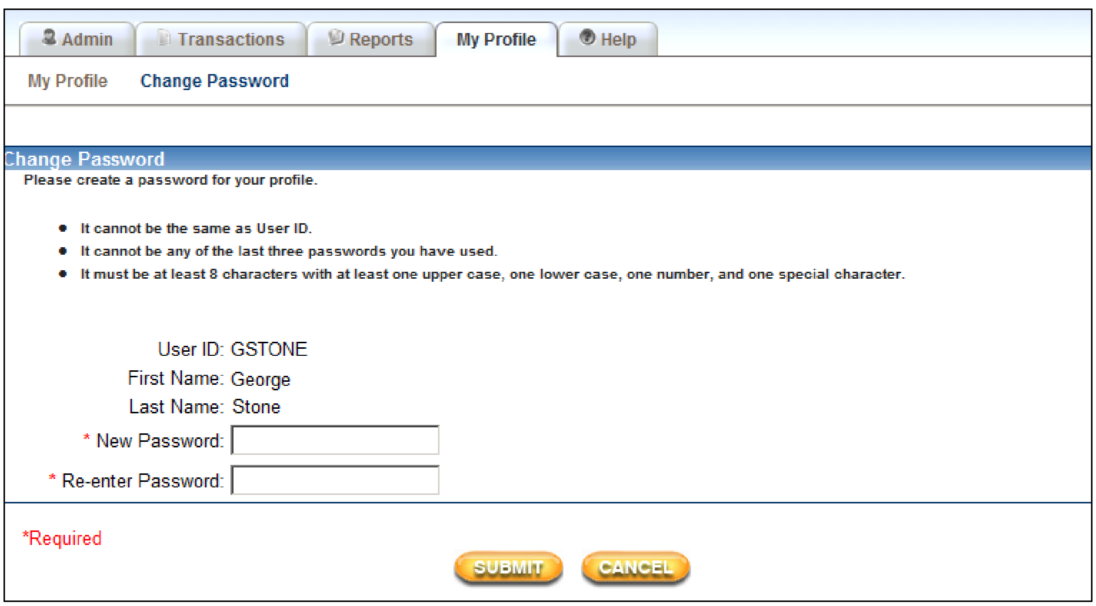


Figure 41: Change Password

Admin Tab

The Admin tab provides you with five screens that enable you to control system access, edit your site address and communication numbers, and rights for users at your site.

User Roles

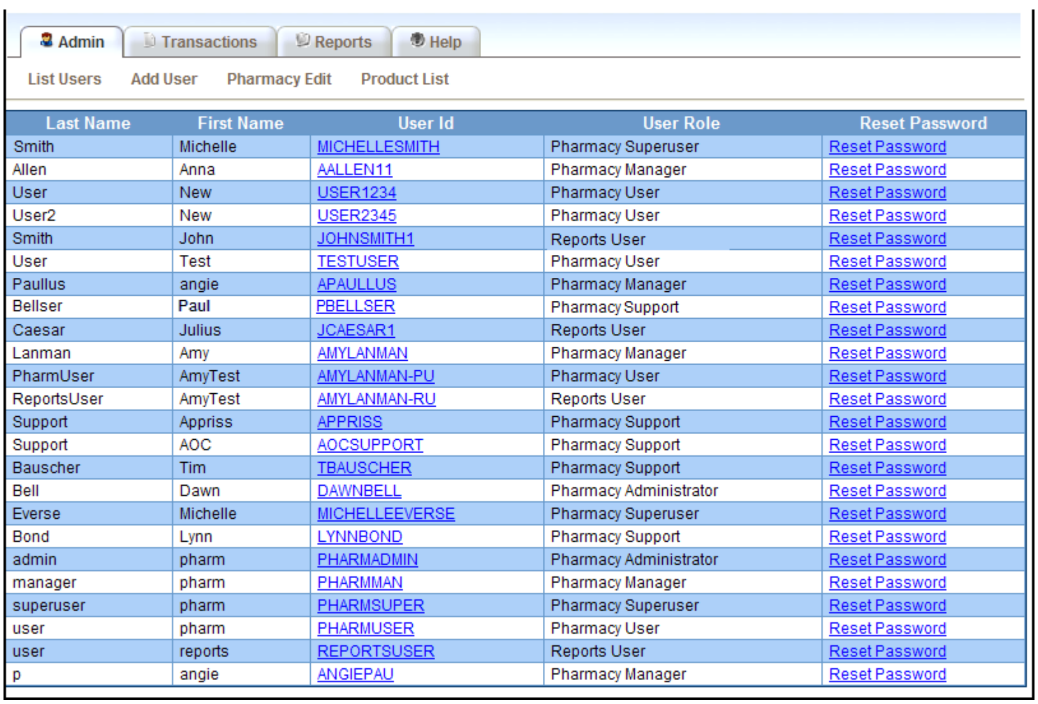
User Roles provide a means to control access to the Retail Portal features. Table 2 shows a list of user roles and their associated privileges.

Table 2: User Role Privileges

User Role	Privileges
Pharmacy Super User	• Able to get into all pharmacies in one site (site level admin) and do all functions. • Able to see users of site level super user and all other users in that pharmacy.
Pharmacy Admin	• Able to get into one pharmacy and do all functions in one pharmacy.
Pharmacy Manager	• All Pharmacy User privileges and can void transactions.
Pharmacy User	• Purchase tab - Needs Pharmacy Admin or Pharmacy Manager to login to void transactions. • Report tab • Help tab
Reporting	• Report tab - Only able to access Transaction Reports and Compliance Reports
Pharmacy Floater	• All Pharmacy User privileges at multiple pharmacies and can void transactions. **Note:** This role is only available at some "chain" pharmacies and possibly some smaller independent pharmacies.

List Users

The List Users screen lists all user names, user IDs, and roles. You can edit user information by clicking on a User ID in the list and you can also change a user's password by clicking on Reset Password in that user's row.



Last Name	First Name	User Id	User Role	Reset Password
Smith	Michelle	MICHELLESMITH	Pharmacy Superuser	Reset Password
Allen	Anna	AALLEN11	Pharmacy Manager	Reset Password
User	New	USER1234	Pharmacy User	Reset Password
User2	New	USER2345	Pharmacy User	Reset Password
Smith	John	JOHNSMITH1	Reports User	Reset Password
User	Test	TESTUSER	Pharmacy User	Reset Password
Paullus	angie	APAULLUS	Pharmacy Manager	Reset Password
Bellser	Paul	PBELLSER	Pharmacy Support	Reset Password
Caesar	Julius	JCAESAR1	Reports User	Reset Password
Lanman	Amy	AMYLANMAN	Pharmacy Manager	Reset Password
PharmUser	AmyTest	AMYLANMAN-PU	Pharmacy User	Reset Password
ReportsUser	AmyTest	AMYLANMAN-RU	Reports User	Reset Password
Support	Appriss	APPRISS	Pharmacy Support	Reset Password
Support	AOC	AOCSUPPORT	Pharmacy Support	Reset Password
Bauscher	Tim	TBAUSCHER	Pharmacy Support	Reset Password
Bell	Dawn	DAWNBELL	Pharmacy Administrator	Reset Password
Everse	Michelle	MICHELLEEVERSE	Pharmacy Superuser	Reset Password
Bond	Lynn	LYNNBOND	Pharmacy Support	Reset Password
admin	pharm	PHARMADMIN	Pharmacy Administrator	Reset Password
manager	pharm	PHARMMAN	Pharmacy Manager	Reset Password
superuser	pharm	PHARMSUPER	Pharmacy Superuser	Reset Password
user	pharm	PHARMUSER	Pharmacy User	Reset Password
user	reports	REPORTSUSER	Reports User	Reset Password
p	angie	ANGIEPAU	Pharmacy Manager	Reset Password

Figure 42: List Users

Editing User Information

Use this feature to change a user's Name or User Role.

To edit user information:

1. From the User ID column of the List Users page (Figure 42), click on a **User ID** and the Edit User screen appears (Figure 43).

Figure 43: Edit User Screen

2. Edit the user information as required, click **Save** to save the changes.
3. Click **Delete** to delete the user, then click **OK** to confirm the deletion.

Resetting a Password

The following steps show how an Administrator would reset a password. Step 1 through Step 3 describe the steps the administrator takes to reset a user's password. Step 4 through Step 8 show the steps the user must take to complete the process.

Note: If the **Forgot Password** option is enabled for your site then the user can reset their own password. See *Forgot Password* on page 10 for more information.

To reset a password:

1. From the Admin tab List Users page, locate the user whose password you want to reset.
2. Click **Reset Password** in that user's row and the Change Password screen appears (Figure 44).
3. Click **Submit** to reset the user's password to the user's current User ID in all upper case.

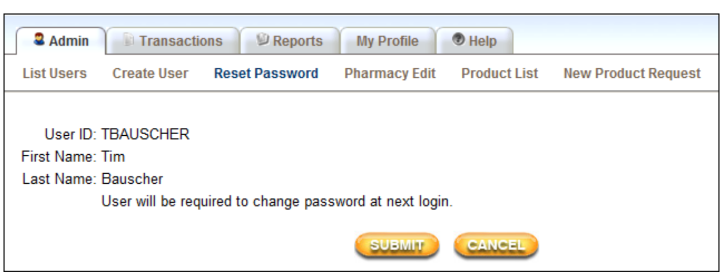


Figure 44: Reset Password

Note: When you click Submit in Step 3 above a message appears at the top of the List Users screen (Figure 45).

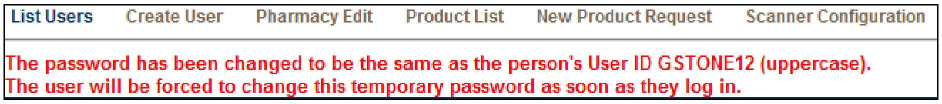


Figure 45: Reset Password

User Steps

4. The next time the user attempts to log in after the reset, they will be required to enter their **User ID,** in all upper case, as the **User ID** and as the **Password** (Figure 47).

For example, User ID GSTONE12 just had his password reset.The first time he logs in (Figure 46) he must enter:

User ID: **GSTONE12**

Password: **GSTONE12**

5. Click **Submit** and Figure 47 appears.

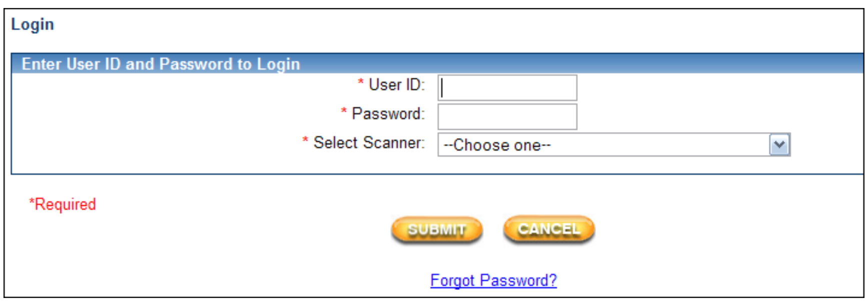


Figure 46: Login Screen

6. The user decides on a new password and enters that password.

Note: The password must be at least 8 characters, including one upper case, lower case, numeral, and special character such as (!, @, $,%, &). Example: **Passwrd8!**.

The password can not be the same as the User ID.

The password can not be any of the last three Retail Portal passwords you have used.

7. Enter the same new password again.
8. Click **Submit** to save the new password.

Note: The next time the user logs in they will use their User ID and new password.

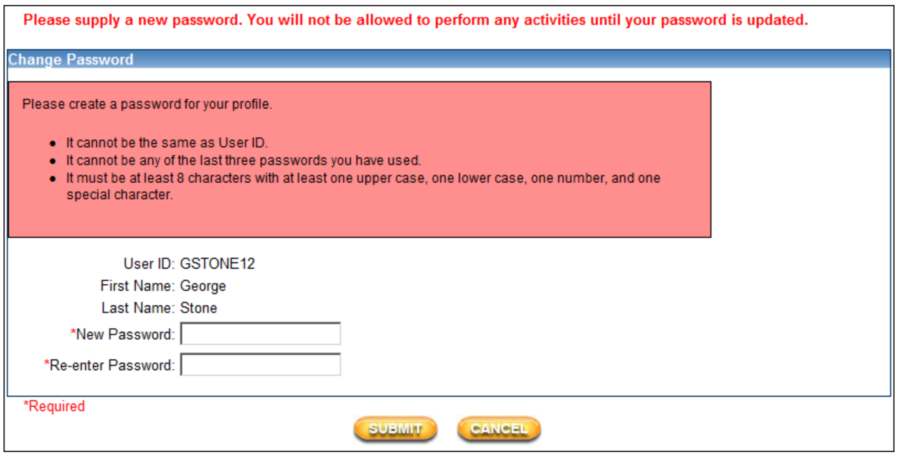


Figure 47: First Login After Reset of Password

Creating a User

To create a new user to the system:

1. From the Admin tab, click **Create User**. The Create User screen appears (Figure 48).
2. Enter the new user's information into the appropriate fields.

Note: The User ID and Password both must be at least 8 characters.

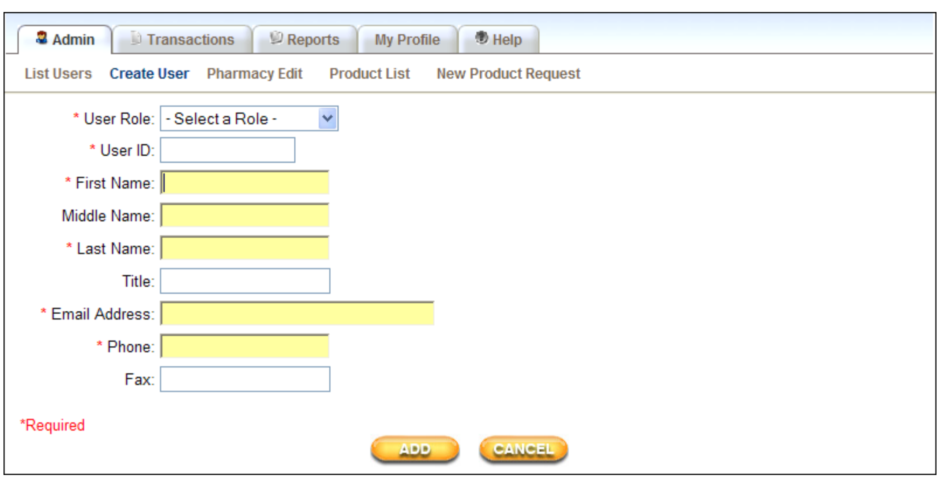


Figure 48: Add User

3. From the User Role drop-down menu, select a User Role (Figure 49).

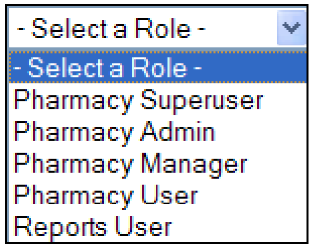


Figure 49: User Role Selection

Note: Only pharmacy administrators should be assigned the Pharmacy Admin role. All other user roles should be set lower than Pharmacy Admin. Roles shown in Figure 49 are in hierarchal order.

4. Click **Add** to add the new user and return to the Admin tab List Users page.

The user account you just created is now in the list of users and a confirmation of the creation appears (Figure 50).

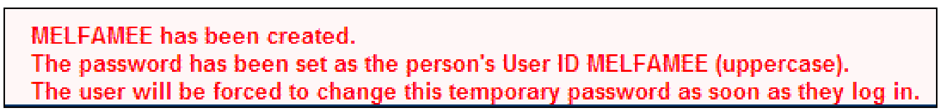


Figure 50: New User Creation Confirmation Message

The first time the user logs in they will be required to:

1. Enter their User ID in all upper case as their User ID.
2. Enter their User ID in all upper case as their Password (Figure 51).

   Note: This is the same process as a Password Reset.

3. Click **Submit** and the Change Password screen appears (Figure 52).

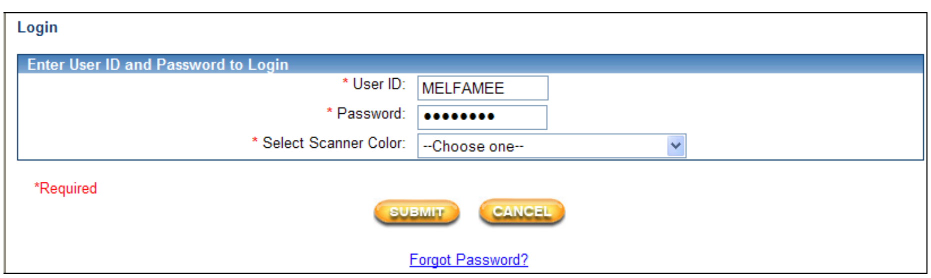


Figure 51: User's First Login

4. Enter a new password, then re-enter the same password.

   Note: The password must be at least 8 characters, including one upper case, lower case, numeral, and special character such as (!, @, $,%, &). Example: **Passwrd8!**.

   The password can not be the same as the User ID.

5. Click **Save** and the user's new password is saved and the user is then logged in to the Retail Portal program.

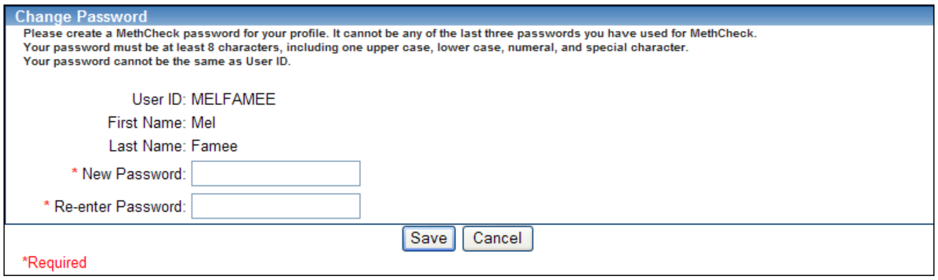


Figure 52: User Must Change First Password

Pharmacy Edit

Use this page to enter or change the pharmacy address, phone, fax, or Email information.

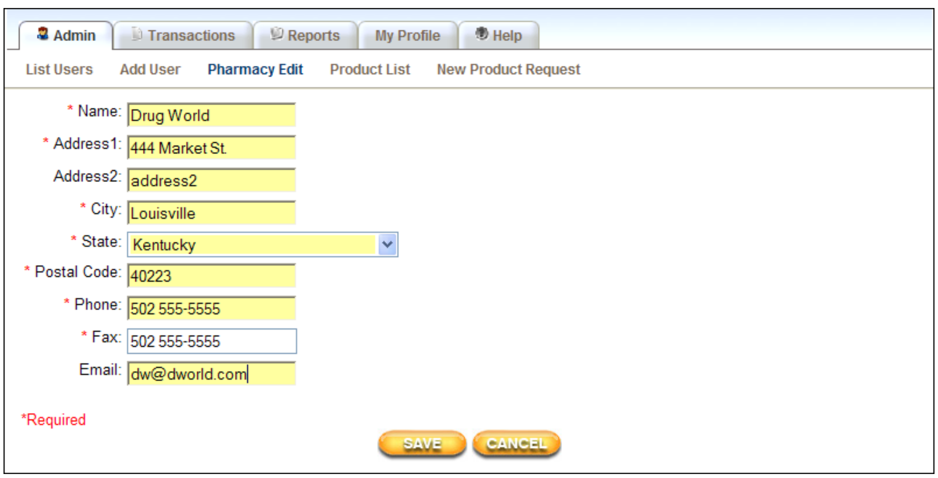


Figure 53: Pharmacy Edit

Product List

Use this page to add PSE products to or delete PSE products from Your Product List. The Master Product List is a comprehensive list of PSE products and is maintained by Appriss.

Note: You can not delete products from the Master Product List.

Note: Product list management and configuration is limited to national brand products and "chain" identifiable products.

Adding Products to Your Product List

As your pharmacy adds new PSE products to its inventory, these products need to be added to **Your Product List**.

Note: Pharmacy chain products are displayed in bold in **Your Product List**. These products in bold do not have a checkbox so you cannot remove them from the list.

Clicking the **Printable Report** link in the Your Product List header creates a PDF file of your products that you can save and print.

To add products to the **Your Product List**:

1. From the Admin tab click **Product List**. The Product List screen appears (Figure 54 on page 38).

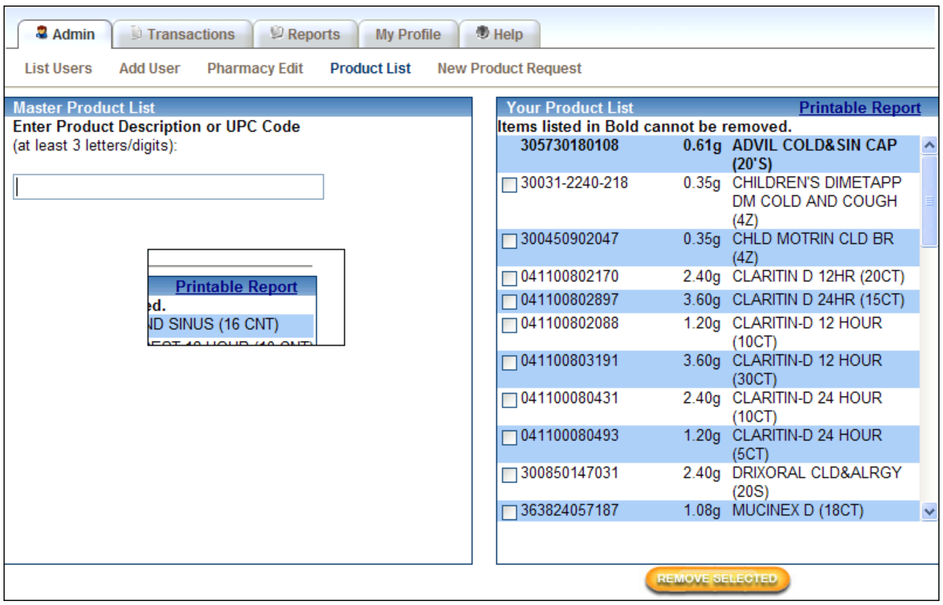


Figure 54: Search for Products to Add to Your Product List

2. Enter at least three characters of a product description or UPC code in the text box.

   Note: If a product name or UPC code that matches your search entry and is not currently in **Your Product List** is found in the **Master Product List**, then these products are listed below your text entry (Figure 55).

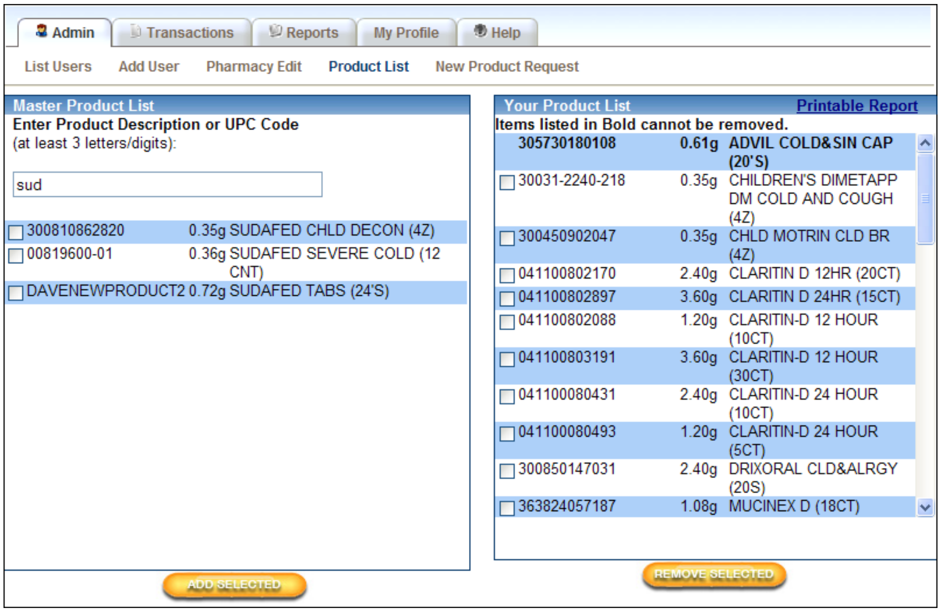


Figure 55: Search for Products to Add to Your Product List

3. Click the checkbox of the product(s) in the **Master Product List** you want to add to **Your Product List**, then click **Add Selected**. The products are added to **Your Product List** and removed from the **Master Product List.**

Removing Products From My Product List

As your pharmacy drops a PSE product from its inventory, these products need to be removed from the Retail Portal product list.

To remove PSE products from the Product List:

1. From the Admin Tab, click Product List.
2. Check the checkboxes next to the products you want to remove from **Your Product List** (Figure 55 on page 39).
3. Click **Remove Selected** and the products are removed from **Your Product List** and added back to the **Master Product List**.

Note: Should your pharmacy decide to carry an inventory of these products again, simply add them back to **Your Product List**.

New Product Request

As new products that contain PSE become available you can request that they be added to the Retail Portal Master Product list. Once you submit a request, you will receive a reply E-mail within 5 days.

To enter a new product request:

1. From the Admin tab, click **New Product Request** and the **New Product Request** screen appears (Figure 56).
2. Enter the 12 digit **Product UPC** number exactly as it is on the product.
3. Enter the **NDC** (National Drug Code) number.
4. Enter a **Product Description**.
5. Use the drop-down menu to select the **Product Type**.
6. Enter the **Pill Count** (number of pills in a box).
7. Enter the **Total PSE** (PSE per pill x number of pills in a box).

Note: Total PSE allowed is 3.600 grams.

8. Enter any notes concerning the product.

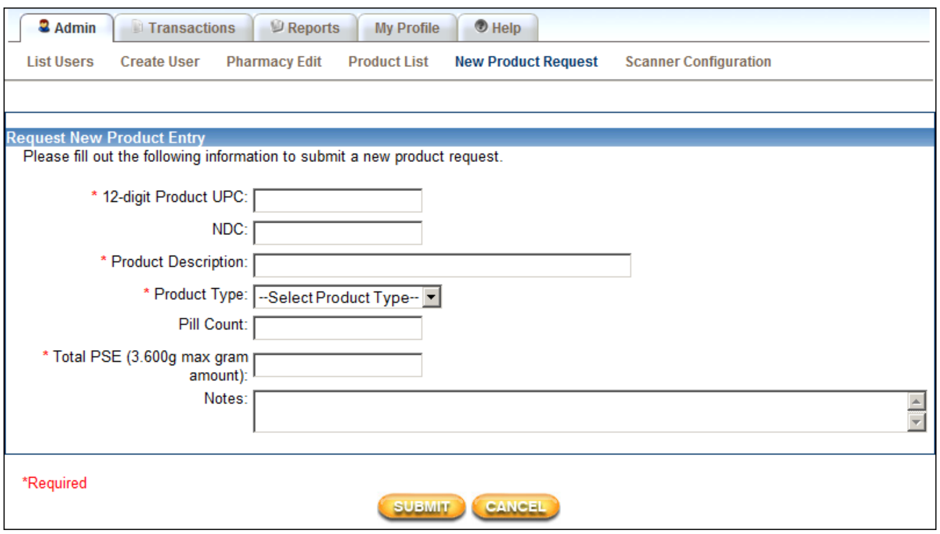


Figure 56: New Product Request

9. Click **Submit** and the New Product Request is saved and a confirmation screen appears (Figure 57).

Figure 57: New Product Request

Scanner Configuration

The scanner configuration page allows you to add, delete, or edit scanners for your system.

Clicking the scanner link opens the Honeywell scanner installation guide to provide you with scanner configuration information.

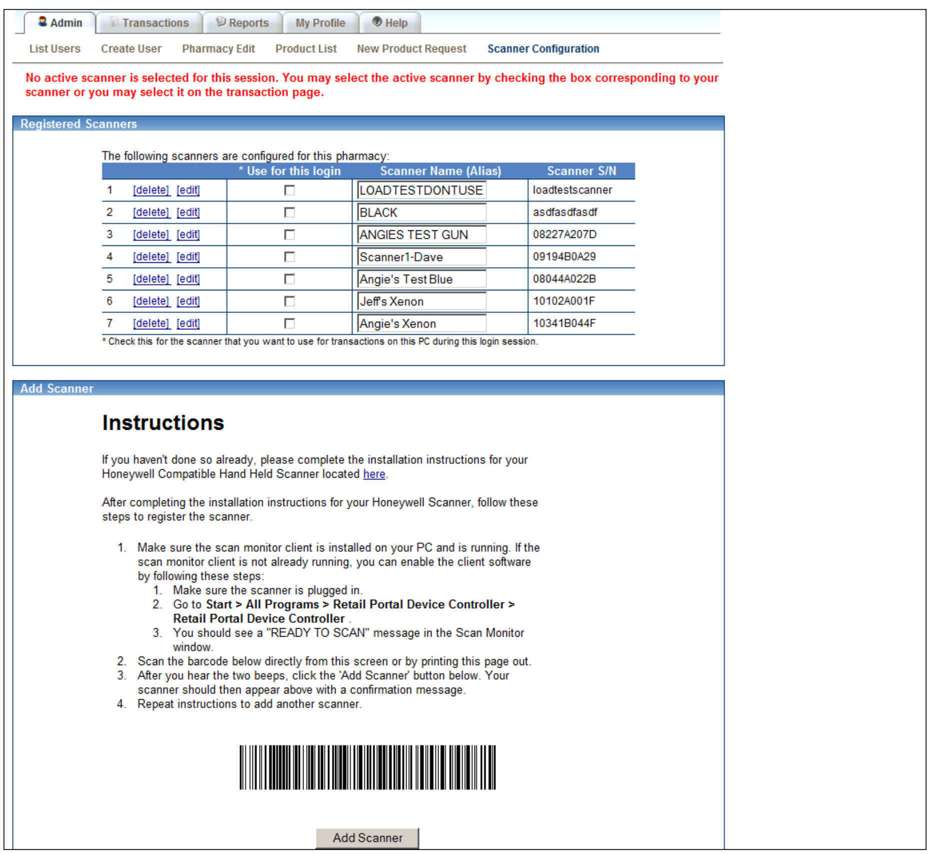


Figure 58: Scanner Configuration Page

Help Tab

The Help tab contains 6 selections:

- Overview
- Users Manual
- Manual Calculation
- Support
- Feedback
- Browser

Help - Overview

About MethCheck

MethCheck Rx captures transaction data electronically, through either a secure website or an interface with pharmacy point-of-sale systems. This eliminates the need for paper logs, speeding up the checkout experience for pharmacy customers.

Here's how it works

MethCheck Rx serves as the single point of contact for managing compliance, ensuring that pharmacies are submitting all required data to law enforcement. Where laws require reporting to centrally managed state repositories, MethCheck automates this reporting, reducing pharmacy reporting overhead.

If a user is inactive for 30 minutes, the session will timeout. The user must log back in to reaccess the system.

Help - Users Manual

Click the Users Manual icon to open a PDF version of this manual. You can save the PDF file to your PC and you can also print it. The Users Manual has a hyperlinked Table of Contents and Index. Click on any of these hyperlinks to jump to that subject.

Note: Print the manual in duplex (front/back) mode to preserve its flow.

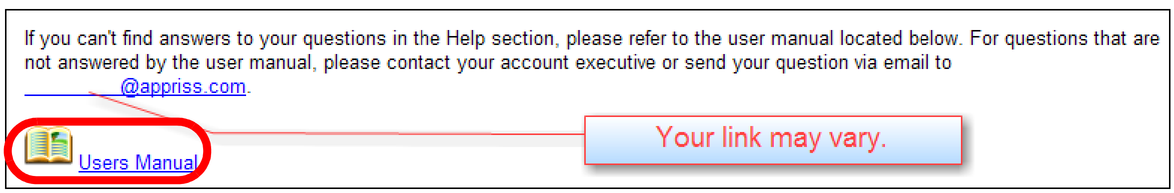


Figure 59: Users Manual

Help - Manual Calculation

Figure 60 shows the formula used to manually calculate total grams of PSE.

$$\frac{\text{\# of Tablets x PSE Content per Pill}}{1000} = \textbf{Total Grams PSE}$$

Figure 60: Calculating Total Grams

Figure 61 shows the same formula applied to boxes of PSE.

$$\frac{\text{1 box of 24 Tablets x 30 mg. PSE per Pill}}{1000} = \textbf{.72 Total Grams PSE}$$

$$\frac{\text{2 boxes of 24 Tablets x 30 mg. PSE per Pill}}{1000} = \textbf{1.44 Total Grams PSE}$$

$$\frac{\text{3 boxes of 24 Tablets x 30 mg. PSE per Pill}}{1000} = \textbf{2.16 Total Grams PSE}$$

Figure 61: Calculating Total Gram for Boxes

Help - Support

The Support page has a number of helpful documents such as:

- **Helpful Documents**

  Frequently Asked Questions

  Pharmacy Support Document

- **Training Documents**

  Retail Portal Job Aid

  Retail Portal Learning Guide

  Retail Portal Cut Sheet

- **Signature Slips**

  Retail Portal Signature Log - See Figure 62 for an example signature log sheet.

  Signature Pad - This is a page of signature slips to be used with scanner equipment to submit electronic signatures.

IMPORTANT: Do not scale down the Signature Pad page when you print it. Always print it out at full size. Altering the size of the printout may affect the success of scanning the slips.

- **Scanner Hardware**

  If you need to reinstall the scanner software for your hand scanner then click the link.

Help - Support - Signature Log Sheet

The Signature Log Sheet (Figure 62) is provided in the event your pharmacy does not use a scanner. Print the log sheet and use it to keep track of PSA transactions and signatures. See *Signature Slips* on page 43 to download a Signature Log sheet.

To save this page as a PDF file so you print it at a later date:

1. From the **Help - Support** tab, click the **Retail Portal Signature Log** and the page appears (Figure 62).
2. From the browser’s **File** menu, select **Save As** and select a folder in which to save the file.

3. Click **Save** and the PDF file is saved.

Transaction ID Number	Signature

WARNING: Section 1001 of Title 18, United States Code, states that whoever, with respect to the logbook, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device a material fact, or makes any materially false, fictitious, or fraudulent statement or representation, or makes or uses any false writing or document knowing the same to contain any materially false, fictitious, or fraudulent statement or entry, shall be fined not more than $250,000 if an individual or $500,000 if an organization, imprisoned not more than five years, or both.

Figure 62: Signature Log Sheet

Help - Feedback

The **Feedback** tab provides a means for questions and feedback.

If you have any questions about the Retail Portal, click on the Appriss Operations Center link (Figure 63) to send us an E-mail.

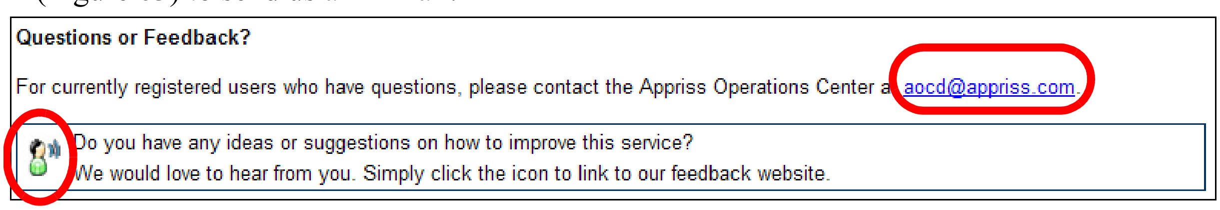


Figure 63: Contact - Questions or Feedback

Click the **Feedback** icon to open the Appriss Feedback screen (Figure 64).

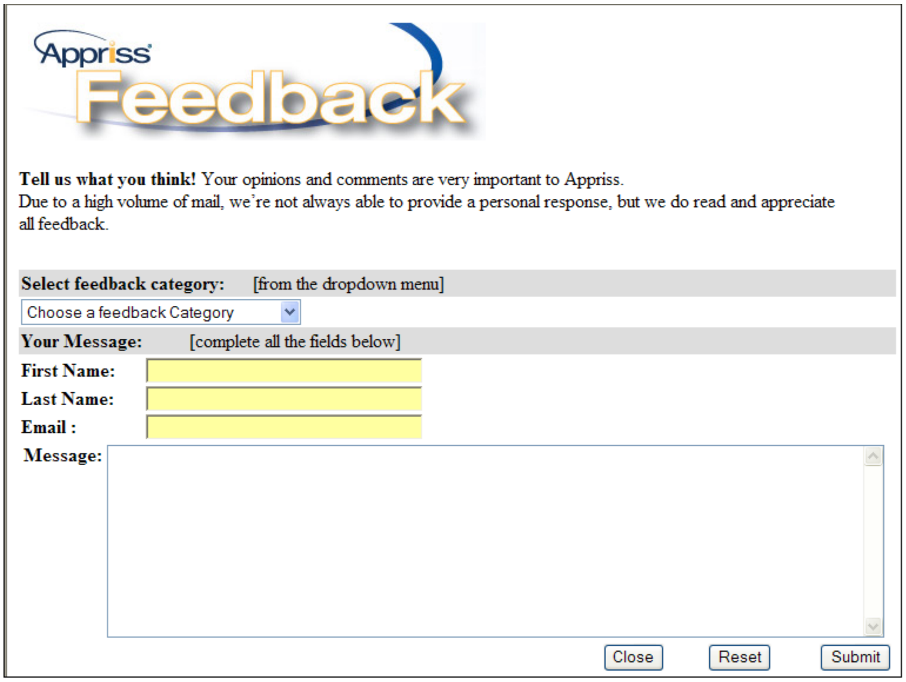


Figure 64: Appriss Feedback Screen

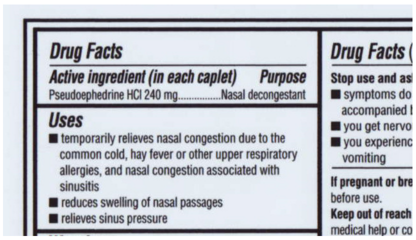
Help - Browser

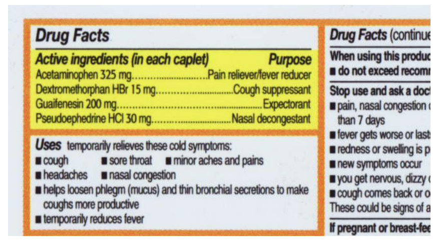
This site has been tested using Internet Explorer 7 or newer and FireFox 3 or newer. If you are using one of these browser versions and having problems with the display features, please contact us at aocd@appriss.com about your problem.

Help - Training

Clicking the **Appriss University - NPLEx Retail Portal Training** link opens a new browser window and shows a short video that walks you through the features and functionality of NPLEx.

Example PSE Products and Their PSE Content





(5 Pills X 240mg) / 1000 = 1.2 grams

(24 Pills X 30mg) / 1000 = .72 grams

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