
Retail Portal

User's Guide



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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).

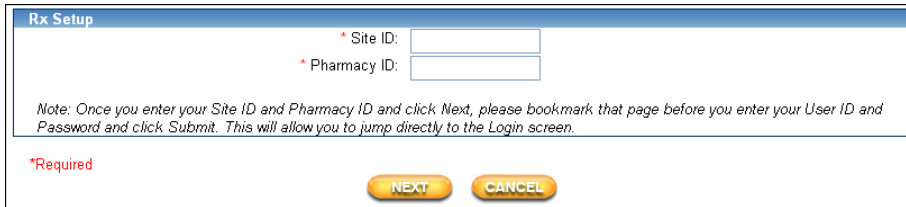


Figure 1: Retail Portal Setup Screen

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).

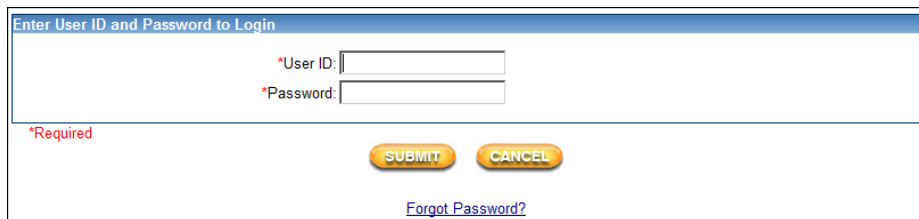


Figure 2: Retail Portal Login Screen

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.

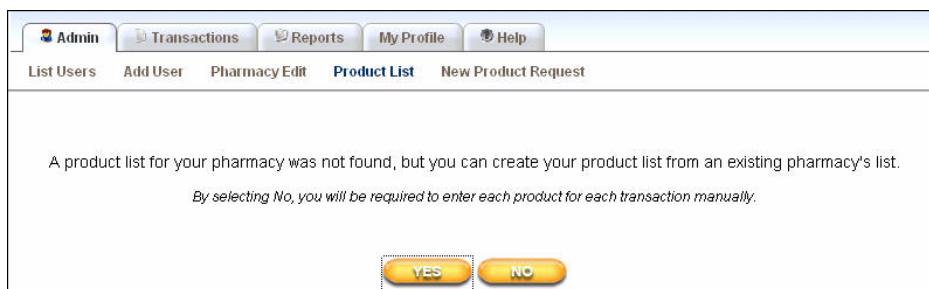
Your Pharmacy Does Not Have Its Own Product List

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.



The screenshot shows a web application interface with a top navigation bar containing 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below this is a sub-navigation bar with 'List Users', 'Add User', 'Pharmacy Edit', 'Product List' (highlighted), and 'New Product Request'. The main content area displays a message: 'A product list for your pharmacy was not found, but you can create your product list from an existing pharmacy's list. By selecting No, you will be required to enter each product for each transaction manually.' At the bottom of the message are two yellow buttons labeled 'YES' and 'NO'.

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).



The screenshot shows the same web application interface as Figure 3. The main content area contains instructions: 'Select from one of the pharmacy product list(s) below and click NEXT. You will be allowed to modify this list in the next step, if necessary. Select CANCEL to begin entering transactions. All transaction product(s) must be entered manually. Select Product List to create your pharmacy product list, starting from an empty list.' Below the text is a table with the following data:

Select	Pharmacy ID	Pharmacy Name	Address	# Products
☐	AR1WALM010	Wal-Mart Store #45	1815 E Highland Drive, ADDRSS, Jonesboro, AR 72401	2
☐	AR1WALM020	Wal-Mart Pharmacy	512 Industrial Dr, Trumann, AR 72472	46
☐	AR1WALM014	Wal-Mart store #68	800 Hwy 64, Wynne, AR 72396	46

At the bottom of the table are two yellow buttons labeled 'NEXT' and 'CANCEL'.

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.

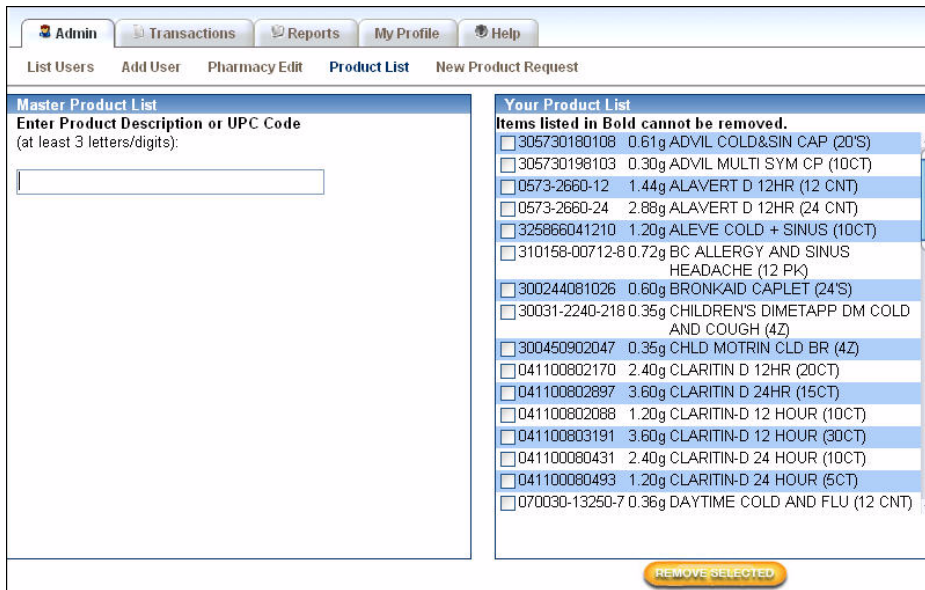


Figure 5: Product List - Adding and Removing Products

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.

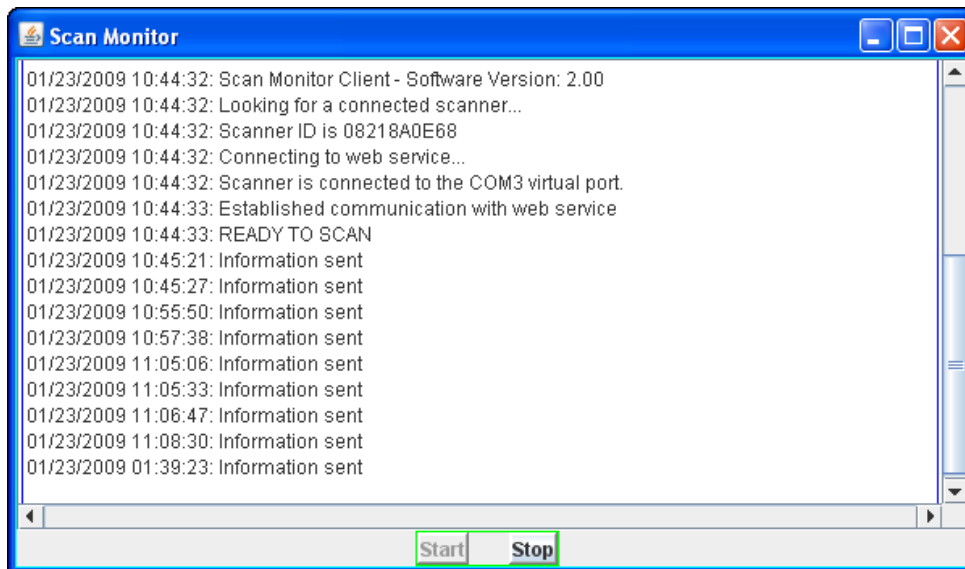


Figure 6: Scan Monitor Screen

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.

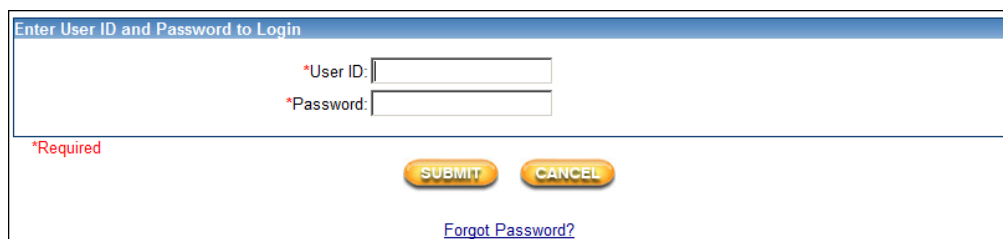
The image shows a login form titled "Enter User ID and Password to Login". It contains two input fields: "*User ID:" and "*Password:". Below the password field is a red asterisk and the word "Required". At the bottom of the form are two buttons: "SUBMIT" and "CANCEL". Below the buttons is a link that says "Forgot 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.

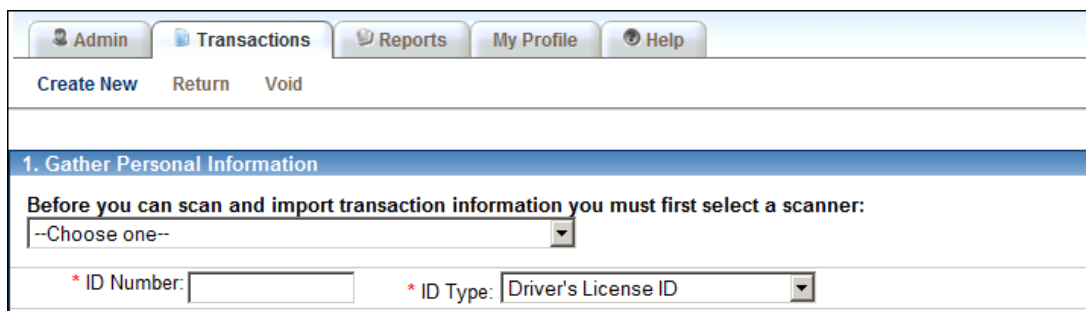
The image shows a screenshot of the "Transactions" page in the Retail Portal. At the top, there are navigation tabs: "Admin", "Transactions", "Reports", "My Profile", and "Help". Below the tabs are buttons: "Create New", "Return", and "Void". The main section is titled "1. Gather Personal Information". Below this title, there is a message: "Before you can scan and import transaction information you must first select a scanner:". Below the message is a drop-down menu with the text "--Choose one--". Below the drop-down menu are two input fields: "* ID Number:" and "* ID Type:". The "ID Type" field has a drop-down menu with the text "Driver's License ID".

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.

Forgot Password Request	
Enter User ID and Email	
*User ID:	
*Email:	
*Required	
Submit	

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.***

Password Reset Request
You will receive an email containing an authorization key that will allow you to reset your MethCheck password. Click on the link and follow the instructions outlined on the web page. For further assistance, please contact AOC at 1-866-APPRISS or aocd@appriss.com.

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

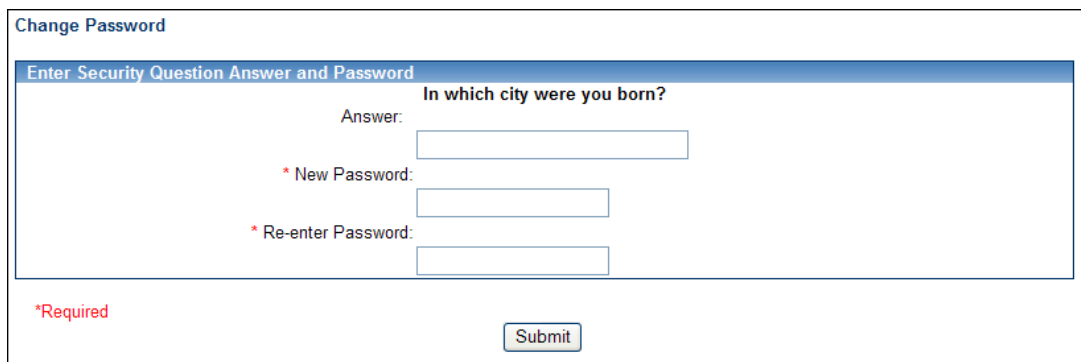
4. Answer the security question.

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: **Passwr8!**

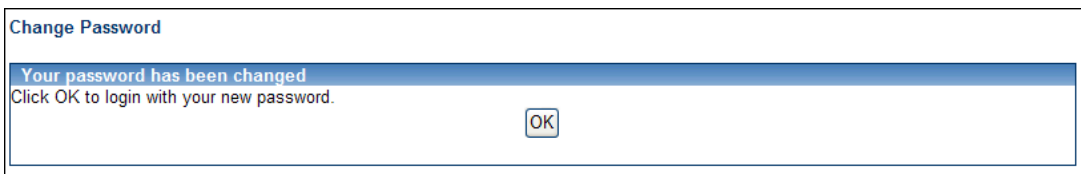
6. Click **Submit** and Figure 14 appears.



The screenshot shows a web form titled "Change Password". Below the title is a blue header bar with the text "Enter Security Question Answer and Password". The form contains three input fields: "Answer:" with the question "In which city were you born?", "* New Password:", and "* Re-enter Password:". A red asterisk indicates required fields. At the bottom right is a "Submit" button. A red asterisk and the word "Required" are at the bottom left.

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.



The screenshot shows a confirmation message box titled "Change Password". It contains the text "Your password has been changed" and "Click OK to login with your new password." Below the text is an "OK" button.

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 [Assigning the Scanner Color for Each Retail Portal Terminal](#) for more information.

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

The screenshot shows the 'New Transactions' form with the following numbered callouts:

- 1: Admin tab
- 2: Transactions tab
- 3: Reports tab
- 4: My Profile tab
- 5: Help tab
- 6: Scanner Color: BLUE | appriess | APPRISSUSER | LOGOUT
- 7: Create New, Return, Void buttons
- 8: Gather Personal Information section
- 9: Scan customer ID and then click IMPORT button
- 10: ID Number, ID Type, ID Issuing Agency, ID Expiration Date, First Name, Middle Initial, Last Name, Suffix, Date of Birth, Address 1, Address 2, City, State/Province, Postal Code fields
- 11: Find button
- 12: Describe Product(s) section
- 13: Scan Products and then click IMPORT button
- 14: Product, # of Boxes, Grams/Box, Total PSE, Remove columns
- 15: Add Additional Product button
- 16: Manually Enter Product Information checkbox

* Product	* # of Boxes	Grams/Box	Total PSE	Remove
	1 (1.99)	0.00 g	0.00 g	
Total Amount:			0.00 g	

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/Province
* 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, Apriss 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:

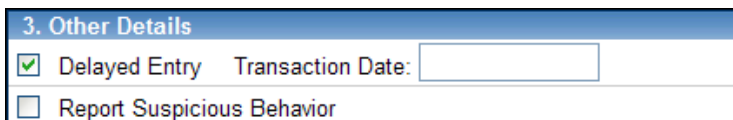
- Product Name
- Quantity of Packages
- Total Grams PSE

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.



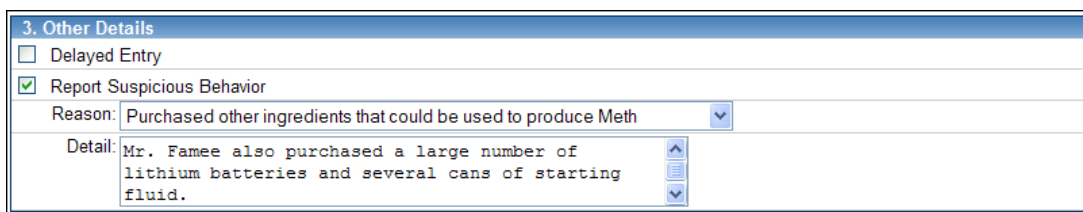
The screenshot shows a form titled "3. Other Details". It contains two rows. The first row has a checked checkbox labeled "Delayed Entry" followed by the text "Transaction Date:" and an empty input field. The second row has an unchecked checkbox labeled "Report Suspicious Behavior".

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.



The screenshot shows a form titled "3. Other Details". It contains two rows. The first row has an unchecked checkbox labeled "Delayed Entry". The second row has a checked checkbox labeled "Report Suspicious Behavior". Below this, there is a "Reason:" label followed by a drop-down menu showing "Purchased other ingredients that could be used to produce Meth". Below that is a "Detail:" label followed by a text area containing the text "Mr. Famee also purchased a large number of lithium batteries and several cans of starting fluid.".

Figure 17: Report Suspicious Behavior

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

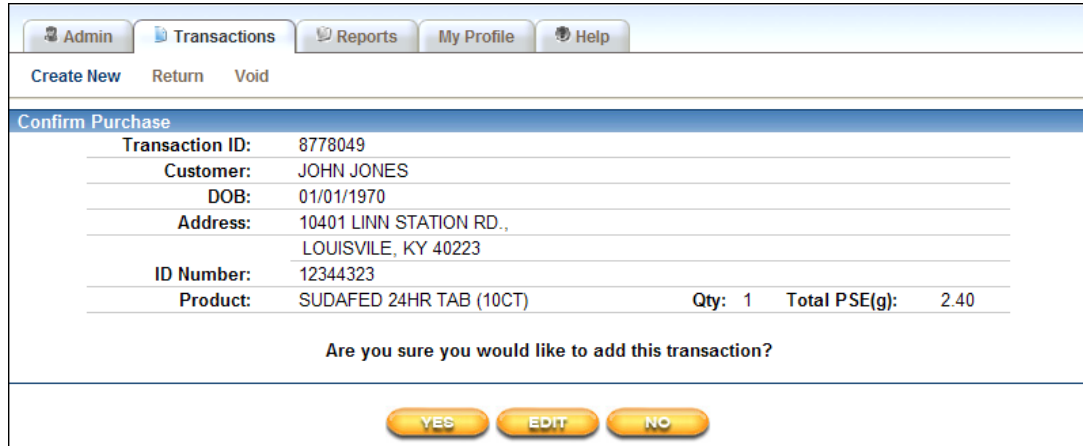
Submitting the Transaction

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.

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



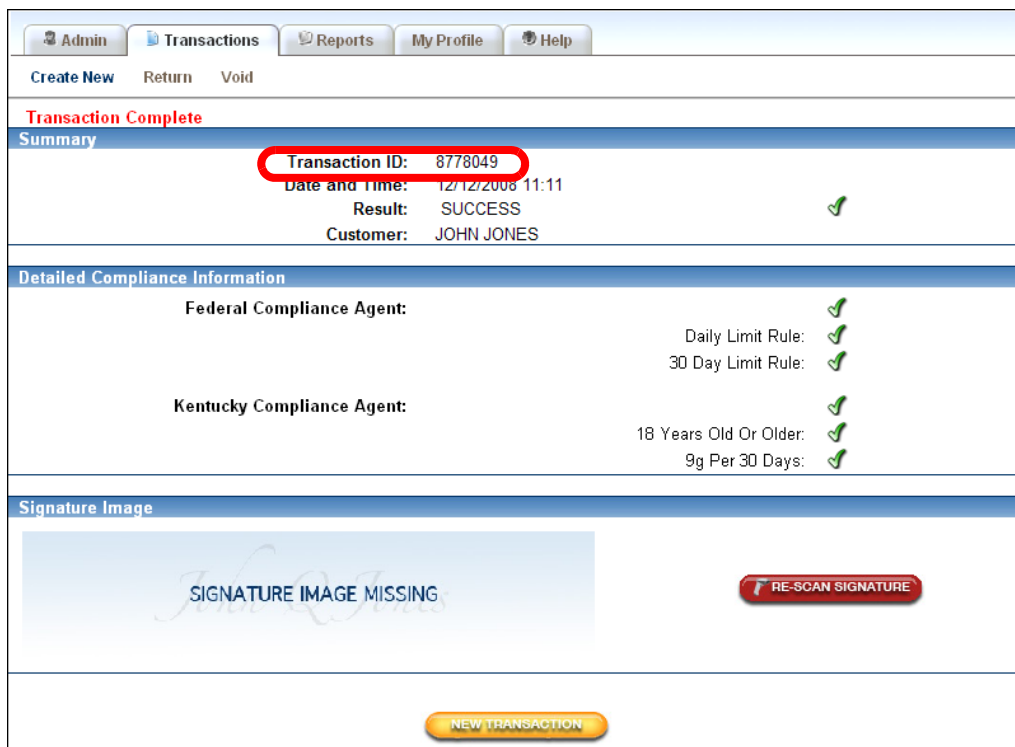
The screenshot shows a web application interface with a top navigation bar containing 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below the navigation bar are links for 'Create New', 'Return', and 'Void'. The main section is titled 'Confirm Purchase' and contains a form with the following fields: Transaction ID (8778049), Customer (JOHN JONES), DOB (01/01/1970), Address (10401 LINN STATION RD., LOUISVILLE, KY 40223), ID Number (12344323), Product (SUDAFED 24HR TAB (10CT)), Qty (1), and Total PSE(g) (2.40). Below the form is a confirmation question: 'Are you sure you would like to add this transaction?'. At the bottom are three buttons: 'YES', 'EDIT', and 'NO'.

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

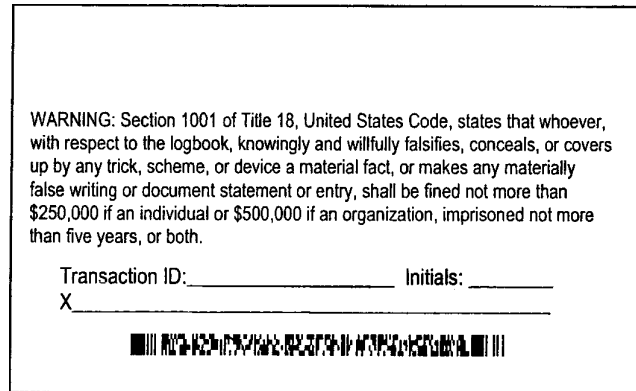
If your pharmacy has a hand scanner then a screen similar to Figure 19 appears when you click the **Yes** button in the screen shown in Figure 18.



The screenshot shows a web application interface with a top navigation bar containing 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below the navigation bar are links for 'Create New', 'Return', and 'Void'. The main section is titled 'Transaction Complete' and contains a 'Summary' section with the following fields: Transaction ID (8778049), Date and Time (12/12/2008 11:11), Result (SUCCESS), and Customer (JOHN JONES). Below the summary is a 'Detailed Compliance Information' section with the following fields: Federal Compliance Agent, Daily Limit Rule, 30 Day Limit Rule, Kentucky Compliance Agent, 18 Years Old Or Older, and 9g Per 30 Days. Below the compliance information is a 'Signature Image' section with a placeholder for a signature image and a 'RE-SCAN SIGNATURE' button. At the bottom is a 'NEW TRANSACTION' button.

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 _____

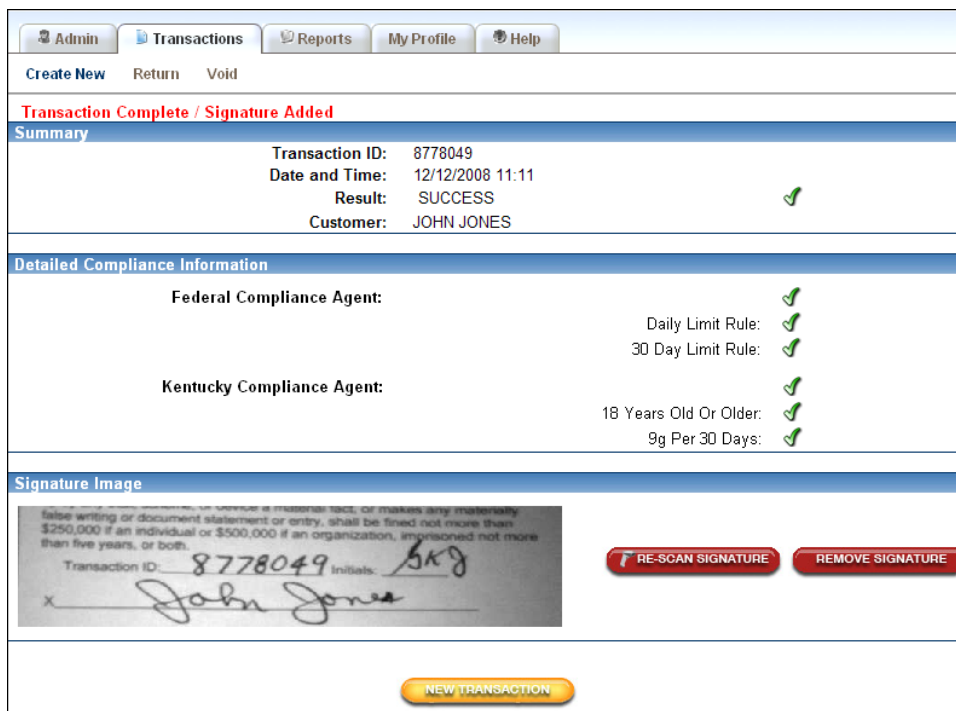
Barcode

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.



Admin Transactions Reports My Profile Help

Create New Return Void

Transaction Complete / Signature Added

Summary

Transaction ID:	8778049
Date and Time:	12/12/2008 11:11
Result:	SUCCESS ✓
Customer:	JOHN JONES

Detailed Compliance Information

Federal Compliance Agent:	Daily Limit Rule: ✓ 30 Day Limit Rule: ✓
Kentucky Compliance Agent:	18 Years Old Or Older: ✓ 9g Per 30 Days: ✓

Signature Image

Transaction ID: 8778049 Initials: Jxg
X John Jones

RE-SCAN SIGNATURE REMOVE SIGNATURE

NEW TRANSACTION

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.

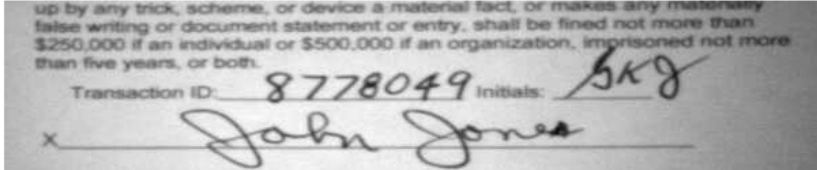
PURCHASE			
Transaction ID:	8800049		
Name:	JOHN JONES		
Address:	2110 BONNEYCASTLE AVE., LOUISVILLE, KY 40207		
DOB:	01/01/1970		
ID Number:	12344323	ID Type:	Driver's License ID
		Issuing Agency:	KY
Date:	04/07/2009 11:50	Technician/Pharmacist:	APPRISSUSER
Product:	SUDAFED 24HR TAB (10CT)		
Qty:	1	Total Grams PSE(g):	2.40
		Total Tablets:	10
		Total Transaction Grams(g):	2.40
		Total Transaction Tablets:	10
			

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.

Admin		Transactions		Reports		My Profile		Help	
Create New	Return	Void							
Summary									
Transaction ID:	3216630								
Date and Time:	04/30/2008 08:31								
Result:	SUCCESS 								
Customer:	GLENN USHER								
Detailed Compliance Information									
Federal Compliance Agent:									
	Daily Limit Rule:								
	30 Day Limit Rule:								
IN Compliance Agent:									
	18 Years Old Or Older:								
	3g Per 7 Days:								
	3g Per Transaction:								
IN Vanderburgh County Compliance Agent:									
	18 Years Old Or Older:								
	2pkg Per 7 Days:								
	2pkg Per Transaction:								

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).

The screenshot displays the 'Transactions' section of the Retail Portal. At the top, there are navigation tabs: Admin, Transactions, Reports, My Profile, and Help. Below these are links for 'Create New', 'Return', and 'Void'. A red banner indicates 'Transaction Complete / Signature Added'. The 'Summary' section shows Transaction ID: 8800057, Date and Time: 04/07/2009 12:07, Result: Purchase - Override (marked with a red checkmark), and Customer: JOHN JONES. The 'Detailed Compliance Information' section lists Federal and Kentucky Compliance Agents, each with a 'Daily Limit Rule' and '30 Day Limit Rule' (both marked with red checkmarks). Below this, the 'Signature Image' section shows a scanned signature of John Jones with Transaction ID: 8800057 and Initials: Jg. To the right of the signature image are buttons for 'RE-SCAN SIGNATURE' and 'REMOVE SIGNATURE'. At the bottom center is a 'NEW TRANSACTION' button.

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).

Admin Transactions Reports My Profile

Create New Return Void

Exceeds gram purchase limit: 2.4 grams allowed.

Transaction ID: 23443

1. Gather Personal Information

* ID Number: 5491234 * ID Type: Driv

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- [redacted], 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 is 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.

Admin **Transactions** **Reports** **My Profile** **Help**

Create New Return Void

Exceeds gram purchase limit: 0.000 grams allowed.

Transaction ID: 8800064

1. Gather Personal Information

Scan customer ID and then click **IMPORT**

* ID Number: 12344323 * ID Type: Driver's License ID

* ID Issuing Agency: Kentucky **Find**

ID Expiration Date: 05/31/2010

* First Name: JOHN Middle Initial: * Last Name: JONES Suffix:

* Date of Birth: 01/01/1970

* Address 1: 2110 BONNEYCASTLE AVE.

Address 2:

City: LOUISVILLE State/Province: Kentucky * Postal Code: 40207

2. Describe Product(s)

Scan Products and then click **IMPORT**

* Product	* # of Boxes	Grams/Box	Total PSE	Remove
SUDAFED 12HR (10'S) - 300810670135	1 (1-99)	1.2 g	1.20 g	
Total Amount:			1.20 g	

3. Other Details

☐ Delayed Entry

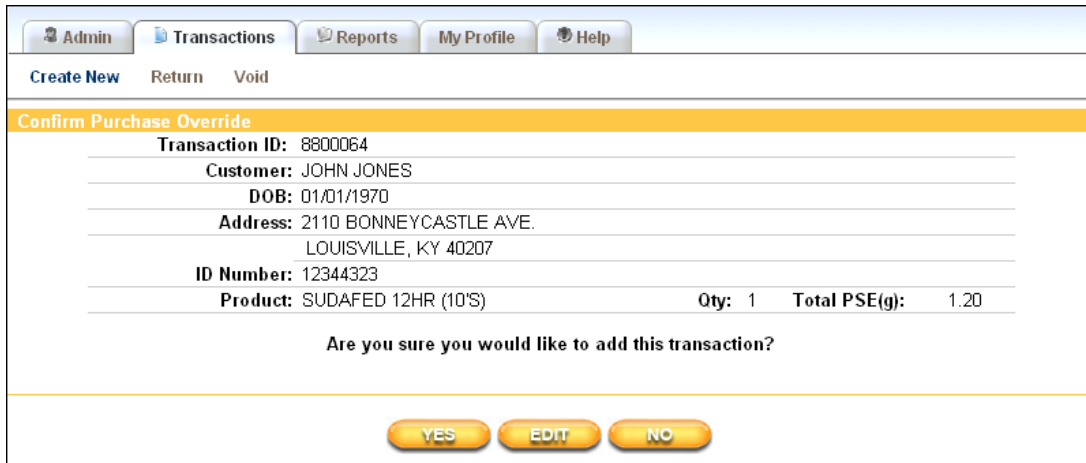
☐ Report Suspicious Behavior

*Required

SUBMIT **CANCEL** **Override**

Figure 27: Transaction Warning Before Override Button Is Clicked

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



The screenshot shows the 'Confirm Purchase Override' screen. At the top, there is a navigation bar with 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below this is a sub-header with 'Create New', 'Return', and 'Void'. The main content area has a yellow header 'Confirm Purchase Override'. Below the header, transaction details are listed: Transaction ID: 8800064, Customer: JOHN JONES, DOB: 01/01/1970, Address: 2110 BONNEYCASTLE AVE. LOUISVILLE, KY 40207, ID Number: 12344323, Product: SUDAFED 12HR (10'S), Qty: 1, Total PSE(g): 1.20. A confirmation question 'Are you sure you would like to add this transaction?' is displayed. At the bottom, there are three buttons: 'YES', 'EDIT', and 'NO'.

Transaction ID:	8800064
Customer:	JOHN JONES
DOB:	01/01/1970
Address:	2110 BONNEYCASTLE AVE. LOUISVILLE, KY 40207
ID Number:	12344323
Product:	SUDAFED 12HR (10'S)
Qty:	1
Total PSE(g):	1.20

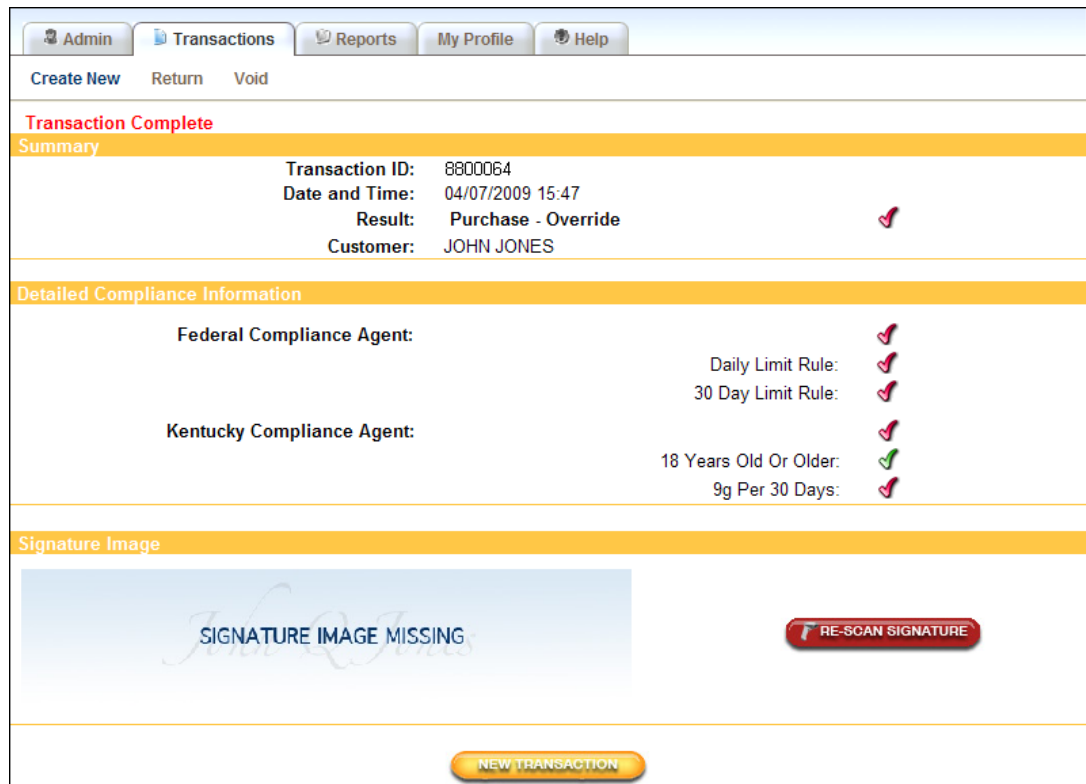
Are you sure you would like to add this transaction?

YES EDIT NO

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.



The screenshot shows the 'Transaction Complete' screen. At the top, there is a navigation bar with 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below this is a sub-header with 'Create New', 'Return', and 'Void'. The main content area has a yellow header 'Transaction Complete'. Below the header, there is a 'Summary' section with transaction details: Transaction ID: 8800064, Date and Time: 04/07/2009 15:47, Result: Purchase - Override, Customer: JOHN JONES. Below the summary is a 'Detailed Compliance Information' section with fields for Federal Compliance Agent, Kentucky Compliance Agent, Daily Limit Rule, 30 Day Limit Rule, 18 Years Old Or Older, and 9g Per 30 Days, each with a red checkmark. Below the compliance information is a 'Signature Image' section with a placeholder for a signature image and a 'RE-SCAN SIGNATURE' button. At the bottom, there is a 'NEW TRANSACTION' button.

Transaction ID:	8800064
Date and Time:	04/07/2009 15:47
Result:	Purchase - Override
Customer:	JOHN JONES

Detailed Compliance Information

Federal Compliance Agent:	Daily Limit Rule:	✓
	30 Day Limit Rule:	✓
Kentucky Compliance Agent:	18 Years Old Or Older:	✓
	9g Per 30 Days:	✓

Signature Image

SIGNATURE IMAGE MISSING

RE-SCAN SIGNATURE

NEW TRANSACTION

Figure 29: Transaction Complete Screen

Note: This completes the transaction.

The screenshot shows the 'Transaction Complete' screen. At the top, there are tabs for Admin, Transactions, Reports, My Profile, and Help. Below the tabs are links for Create New, Return, and Void. The main content area is divided into three sections: Summary, Detailed Compliance Information, and Signature Image. The Summary section shows Transaction ID: 8800064, Date and Time: 04/07/2009 12:20, Result: Purchase - Override (with a red checkmark), and Customer: JOHN JONES. The Detailed Compliance Information section shows Federal Compliance Agent and Kentucky Compliance Agent, both with Daily Limit Rule and 30 Day Limit Rule (all with green checkmarks). The Signature Image section shows a signature of John Jones with Transaction ID: 8800064 and Initials: JKG. A 'RE-SCAN SIGNATURE' button is next to the signature. At the bottom, there is a 'NEW TRANSACTION' button.

Summary	
Transaction ID:	8800064
Date and Time:	04/07/2009 12:20
Result:	Purchase - Override ✓
Customer:	JOHN JONES

Detailed Compliance Information	
Federal Compliance Agent:	Daily Limit Rule: ✓ 30 Day Limit Rule: ✓
Kentucky Compliance Agent:	18 Years Old Or Older: ✓ 9g Per 30 Days: ✓

Signature Image

Transaction ID: 8800064 Initials: JKG

RE-SCAN SIGNATURE

NEW 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:	APPRISUSER
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.

1. Gather Personal Information

Scan customer ID and then click **IMPORT**

* ID Number: F043013455 * ID Type: Driver's License ID

* ID Issuing Agency: Kentucky **Find**

ID Expiration Date: 05/31/2010

* First Name: MEL Middle Initial: * Last Name: FAMEE Suffix:

* Date of Birth: 05/30/1951

* Address 1: 2110 BONNEYCASTLE AVE.

Address 2:

City: LOUISVILLE State/Province: Kentucky * Postal Code: 40207

2. Describe Product(s)

Scan Products and then click **IMPORT**

* Product	* # of Boxes	Grams/Box	Total PSE	Remove
	1 (1-99)	0.00 g	0.00 g	
Total Amount:			0.00 g	

Manually Enter Product Information

*Required

SUBMIT CANCEL

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).

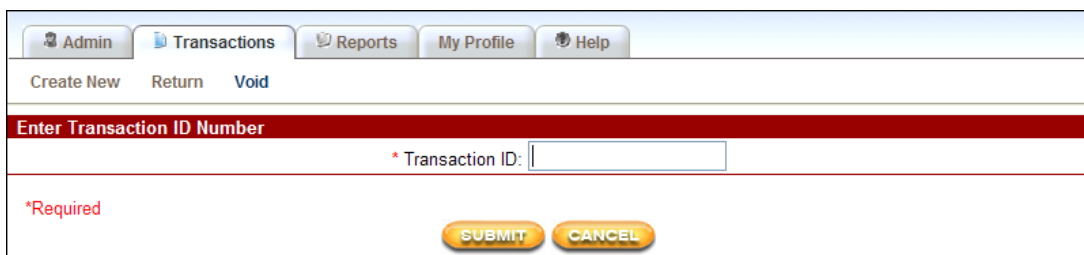


Figure 33: Void - Enter Transaction Number

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.

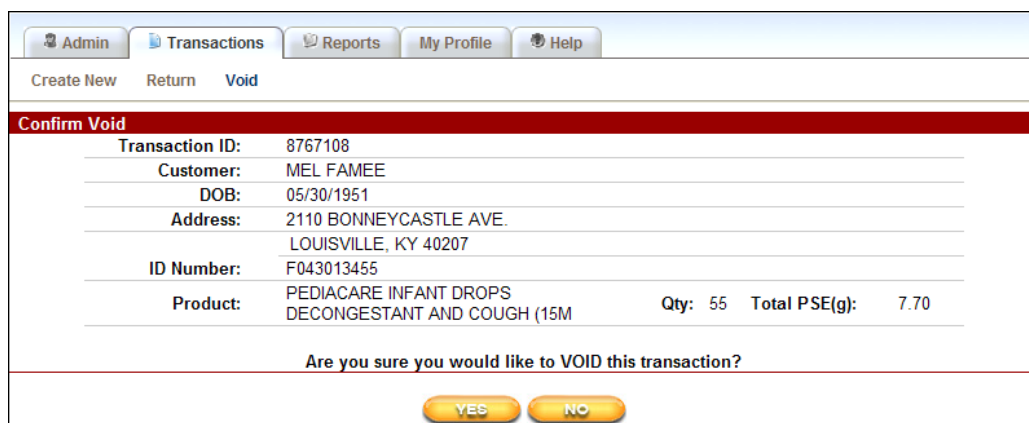


Figure 34: Void Confirmation

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

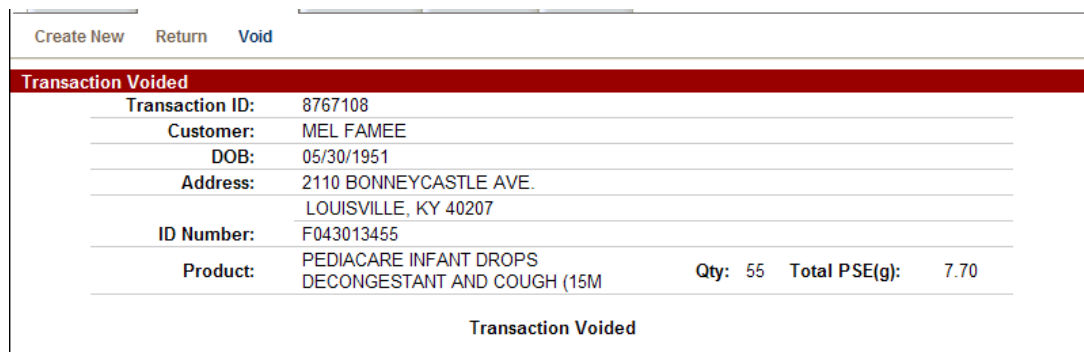


Figure 35: Transaction Voided

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).

Admin Transactions Reports My Profile Help

Report

*Report: Transaction Summary

Please enter a date range for transaction report:

* From: 03/30/2011 Hours: 12 Min: 00 AM/PM: AM

* To: 04/28/2011 Hours: 11 Min: 55 AM/PM: PM

Pharmacy Time Zone: US/Eastern Specify Time: ☐

*Required

SUBMIT CANCEL

Figure 36: Transaction Summary Report Entry Screen

Admin Transactions Reports My Profile Help		
New Search Modify Search		
Transaction Summary Report for 03/29/2008 00:00 EDT - 04/29/2008 23:55 EDT		
Type: PURCHASE	Trans. ID: 1647895	Date: 03/31/2008 13:38
Name: TESTER E TEST-1207593514255-5142 JR	DOB: 05/05/1945	
Address: 123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243		
Qty: 1	Grams: 0.90	
Type: PURCHASE	Trans. ID: 1639826	Date: 04/04/2008 08:48
Name: AMY G LANMAN	DOB: 12/27/1968	
Address: 123 ANYWHERE STREET, EVANSVILLE, IN 47708		
Qty: 1	Grams: 0.35	
Type: RETURN	Trans. ID: 1647896	Date: 04/07/2008 13:38
Name: TESTER E TEST-1207593514255-5142 JR	DOB: 05/05/1945	
Address: 123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243		
Qty: 1	Grams: -0.90	
Type: PURCHASE	Trans. ID: 1647897	Date: 04/07/2008 13:38
Name: TESTER E TEST-1207593514255-5142 JR	DOB: 05/05/1945	
Address: 123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243		
Qty: 1	Grams: 2.88	
Type: PURCHASE	Trans. ID: 1647907	Date: 04/07/2008 13:39
Name: TESTER E TEST-1207593548739-5308 JR	DOB: 05/05/1945	
Address: 123 AROUND THE CORNER, APT 2B, EVANSVILLE, IN 47715		
Qty: 1	Grams: 0.90	
Type: PURCHASE	Trans. ID: 1821343	Date: 04/16/2008 00:00
Name: BOB T BROWN II	DOB: 12/27/1968	
Address: 5 ALOHA AVE, SUITE A, LOUISVILLE, KY 40223		
Qty: 2	Grams: 1.39	
Type: PURCHASE	Trans. ID: 1692627	Date: 04/16/2008 14:25
Name: TESTER E TEST-1208373956339-4259 JR	DOB: 05/05/1945	
Address: 123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243		
Qty: 2	Grams: 2.88	
Type: PURCHASE	Trans. ID: 1822508	Date: 04/18/2008 13:32
Name: ANDREW PARDY	DOB: 04/16/1970	
Address: 1012 ST. PETE LANE, FORT WAYNE, IN 46863		
Qty: 1	Grams: 1.20	

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).

Admin	Transactions	Reports	My Profile	Help
-------	--------------	---------	------------	------

Transaction Report for 03/29/2008 00:00 EDT - 04/29/2008 23:55 EDT

PURCHASE				
Transaction ID:	1647895			
Name:	TESTER E TEST-1207593514255-5142 JR			
Address:	123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243			
DOB:	05/05/1945			
ID Number:	TEST12075935142555142	ID Type:	Driver's License ID	Issuing Agency: IN
Date:	03/31/2008 13:38	Technician/Pharmacist:	TEST-1207593514255-5142	
Product:	ADVIL MULTI SYM CP			
Qty:	1	Total Grams PSE(g):	0.90	
		Total Transaction Grams(g):	0.90	

PURCHASE				
Transaction ID:	1639826			
Name:	AMY G LANMAN			
Address:	123 ANYWHERE STREET, EVANSVILLE, IN 47708			
DOB:	12/27/1968			
ID Number:	1234	ID Type:	Driver's License ID	Issuing Agency: IN
Date:	04/04/2008 08:48	Technician/Pharmacist:	APPRISUSER	
Product:	CHLD MOTRIN CLD BR (4Z)			
Qty:	1	Total Grams PSE(g):	0.35	
		Total Transaction Grams(g):	0.35	

RETURN				
Transaction ID:	1647896			
Name:	TESTER E TEST-1207593514255-5142 JR			
Address:	123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243			
DOB:	05/05/1945			
ID Number:	TEST12075935142555142	ID Type:	Driver's License ID	Issuing Agency: IN
Date:	04/07/2008 13:38	Technician/Pharmacist:	TEST-1207593515163-6928	
Product:	ADVIL MULTI SYM CP			
Qty:	1	Total Grams PSE(g):	-0.90	
		Total Transaction Grams(g):	-0.90	

PURCHASE				
Transaction ID:	1647897			
Name:	TESTER E TEST-1207593514255-5142 JR			
Address:	123 AROUND THE CORNER, APT 2B, LOUISVILLE, KY 40243			
DOB:	05/05/1945			
ID Number:	TEST12075935142555142	ID Type:	Driver's License ID	Issuing Agency: IN
Date:	04/07/2008 13:38	Technician/Pharmacist:	TEST-1172505196474	
Product:	CVS DEC ANTIHIS TB			
Qty:	1	Total Grams PSE(g):	2.88	
		Total Transaction Grams(g):	2.88	

PURCHASE				
Transaction ID:	1647907			
Name:	TESTER E TEST-1207593548739-5308 JR			
Address:	123 AROUND THE CORNER, APT 2B, EVANSVILLE, IN 47715			
DOB:	05/05/1945			
ID Number:	TEST12075935487395308	ID Type:	Driver's License ID	Issuing Agency: IN
Date:	04/07/2008 13:39	Technician/Pharmacist:	TEST-1207593548739-5308	
Product:	ADVIL MULTI SYM CP			
Qty:	1	Total Grams PSE(g):	0.90	
		Total Transaction Grams(g):	0.90	

PURCHASE				
Transaction ID:	1821343			
Name:	BOB T BROWN II			
Address:	5 ALOHA AVE, SUITE A, LOUISVILLE, KY 40223			
DOB:	12/27/1968			
ID Number:	5000	ID Type:	Educational/Institutional Issued	Issuing Agency: Other
Date:	04/16/2008 00:00	Technician/Pharmacist:	APPRISUSER	
Product:	NEW PRODUCT			
Qty:	1	Total Grams PSE(g):	1.25	Total Tablets:
Product:	PEDIACARE DEC DRPS (5Z)			
Qty:	1	Total Grams PSE(g):	0.14	
		Total Transaction Grams(g):	1.39	Total Transaction Tablets:
				10

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).

Admin Transactions Reports My Profile Help

New Search Modify Search

Compliance Report for 11/04/2008 00:00 EST - 12/03/2008 23:55 EST

PURCHASE

Transaction ID:	8751053				
Name:	JEFF SESAME				
Address:	6625 DAMON ROAD, LOUISVILLE, KY 40223				
DOB:	12/10/1970				
ID Number:	2020	ID Type:	Driver's License ID	Issuing Agency:	KY
Date:	11/11/2008 15:18	Technician/Pharmacist:	APPRISSUSER		
Product:	CLARITIN D 12HR (20CT)				
Qty:	1	Total Grams PSE(g):	2.40	Total Tablets:	20
		Total Transaction Grams(g):	2.40	Total Transaction Tablets:	20

RETURN

Transaction ID:	8751055				
Name:	JEFF SESAME				
Address:	6625 DAMON ROAD, LOUISVILLE, KY 40223				
DOB:	12/10/1970				
ID Number:	2020	ID Type:	Driver's License ID	Issuing Agency:	KY
Date:	11/11/2008 15:22	Technician/Pharmacist:	APPRISSUSER		
Product:	CLARITIN D 12HR (20CT)				
Qty:	1	Total Grams PSE(g):	-2.40	Total Tablets:	20
		Total Transaction Grams(g):	-2.40	Total Transaction Tablets:	20

PURCHASE - OVERRIDE

Transaction ID:	8769049				
Name:	ANGELE PAULLUS				
Address:	5566 RUER CIRCLE, LOUISVILLE, KY 40244				
DOB:	07/30/1977				
ID Number:	P07550557	ID Type:	Driver's License ID	Issuing Agency:	KY
Date:	12/02/2008 11:10	Technician/Pharmacist:	APPRISSUSER		
Product:	SUDAFED 12 HOUR				
Qty:	1	Total Grams PSE(g):	2.40	Total Tablets:	20
		Total Transaction Grams(g):	2.40	Total Transaction Tablets:	20

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: 8769049 Initials: AOP

x [Signature] [Signature]

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.

Admin Transactions Reports **My Profile** Help

My Profile Change Password

Edit My Account

User Role: Pharmacy User
User ID: GSTONE

* First Name:

Middle Name:

* Last Name:

Title:

* Email Address:

* Phone:

Fax:

* Security Question:

* Security Answer:

*Required

SAVE **CANCEL**

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: **Passwr8!**.

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.

The screenshot shows a web interface with a navigation bar at the top containing 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below the navigation bar, there are tabs for 'My Profile' and 'Change Password'. The 'Change Password' tab is active, displaying a form titled 'Change Password' with the instruction 'Please create a password for your profile.' Below this, there are three bullet points: 'It cannot be the same as User ID.', 'It cannot be any of the last three passwords you have used.', and 'It must be at least 8 characters with at least one upper case, one lower case, one number, and one special character.' The form also displays user information: 'User ID: GSTONE', 'First Name: George', and 'Last Name: Stone'. There are two password input fields: '* New Password:' and '* Re-enter Password:'. At the bottom of the form, there is a red asterisk followed by the word 'Required' and two buttons: 'SUBMIT' and 'CANCEL'.

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.

Admin Transactions Reports Help				
List Users Add User Pharmacy Edit Product List				
Last Name	First Name	User Id	User Role	Reset Password
Smith	Michelle	MICHELLESMITH	Pharmacy Superuser	Reset Password
Allen	Anna	ALLEN11	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	APAUULLUS	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

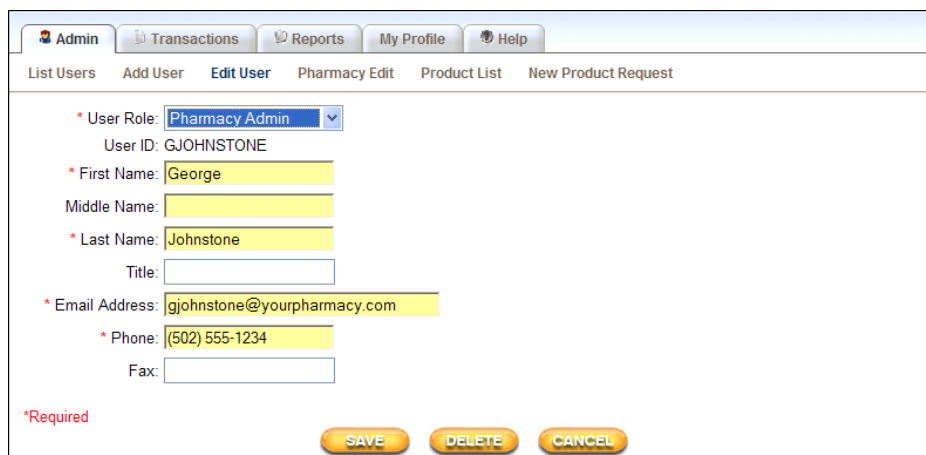
Figure 42: List Users

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).



The screenshot shows the 'Edit User' screen within the 'Admin' tab. The navigation bar includes 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below the navigation bar, there are links: 'List Users', 'Add User', 'Edit User' (highlighted), 'Pharmacy Edit', 'Product List', and 'New Product Request'. The form contains the following fields:

- * User Role: Pharmacy Admin (dropdown menu)
- User ID: GJOHNSTONE
- * First Name: George
- Middle Name: (empty)
- * Last Name: Johnstone
- Title: (empty)
- * Email Address: gjohnstone@yourpharmacy.com
- * Phone: (502) 555-1234
- Fax: (empty)

A red asterisk indicates required fields. At the bottom, there are three buttons: 'SAVE', 'DELETE', and 'CANCEL'. A red text label '*Required' is located at the bottom left of the form area.

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.

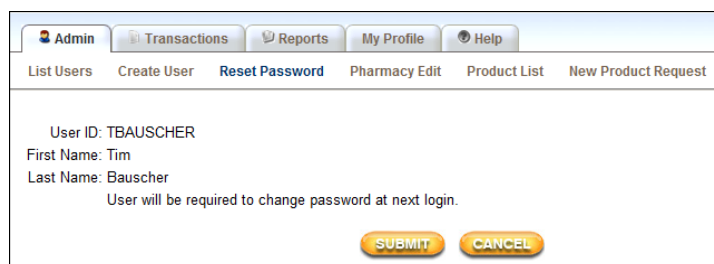
Resetting a Password

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.



The screenshot shows the 'Reset Password' screen within the 'Admin' tab. The navigation bar includes 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. Below the navigation bar, there are links: 'List Users', 'Create User', 'Reset Password' (highlighted), 'Pharmacy Edit', 'Product List', and 'New Product Request'. The form displays the following information:

- User ID: TBAUSCHER
- First Name: Tim
- Last Name: Bauscher

Below the user information, it states: 'User will be required to change password at next login.' At the bottom, there are two buttons: 'SUBMIT' and 'CANCEL'.

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).

List Users	Create User	Pharmacy Edit	Product List	New Product Request	Scanner Configuration
The password has been changed to be the same as the person's User ID GSTONE12 (uppercase). The user will be forced to change this temporary password as soon as they log in.					

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.

Login

Enter User ID and Password to Login

* User ID:

* Password:

* Select Scanner: --Choose one-- 

*Required

SUBMIT

CANCEL

[Forgot Password?](#)

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: **Passwr8!**.

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.

Please supply a new password. You will not be allowed to perform any activities until your password is updated.

Change Password

Please create a password for your profile.

- It cannot be the same as User ID.
- It cannot be any of the last three passwords you have used.
- It must be at least 8 characters with at least one upper case, one lower case, one number, and one special character.

User ID: GSTONE12
First Name: George
Last Name: Stone

*New Password:
*Re-enter Password:

*Required

SUBMIT CANCEL

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.

Admin Transactions Reports My Profile Help

List Users **Create User** Pharmacy Edit Product List New Product Request

* User Role: - Select a Role -
* User ID:
* First Name:
Middle Name:
* Last Name:
Title:
* Email Address:
* Phone:
Fax:

*Required

ADD CANCEL

Figure 48: Add User

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

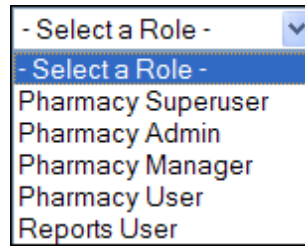


Figure 49: User Role Selection

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).

A screenshot of a login form titled "Login". The form has a header "Enter User ID and Password to Login". Below this, there are three fields: "User ID:" with the value "MELFAMEE", "Password:" with masked characters "••••••", and "Select Scanner Color:" with a dropdown menu showing "--Choose one--". Below the fields, there are two buttons: "SUBMIT" and "CANCEL". At the bottom, there is a link "Forgot Password?". A red asterisk and the word "Required" are shown to the left of the form fields.

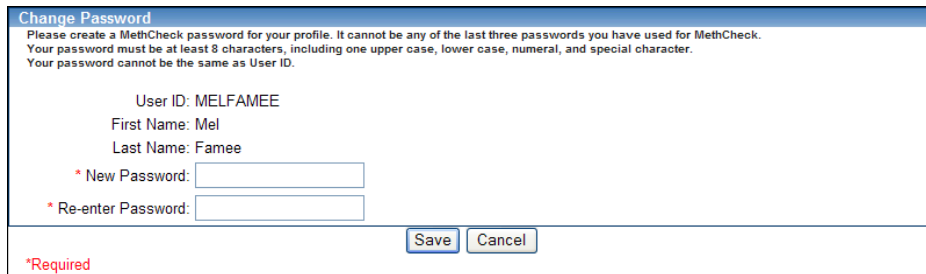
Figure 51: User's First Login

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: **Passwrđ8!**

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.

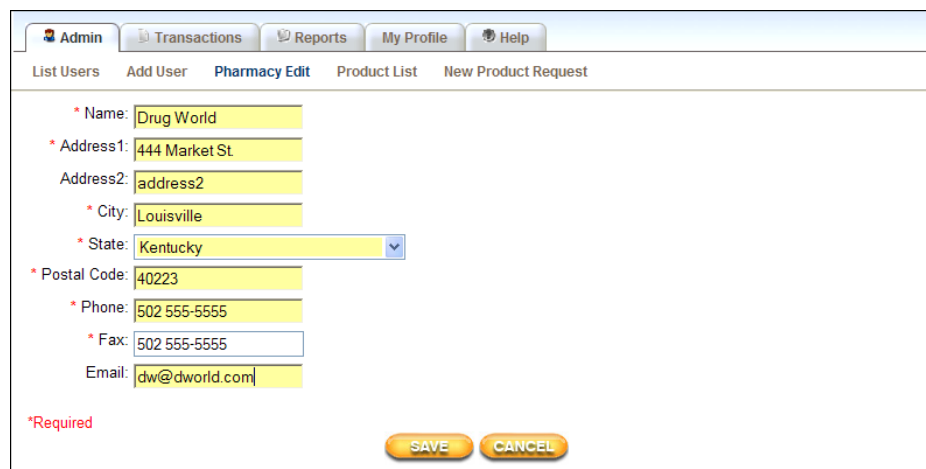


The 'Change Password' form is titled 'Change Password' in a blue header. Below the header, it contains instructions: 'Please create a MethCheck password for your profile. It cannot be any of the last three passwords you have used for MethCheck. Your password must be at least 8 characters, including one upper case, lower case, numeral, and special character. Your password cannot be the same as User ID.' The form displays user information: 'User ID: MELFAMEE', 'First Name: Mel', and 'Last Name: Famee'. There are two password input fields: '* New Password:' and '* Re-enter Password:'. At the bottom right are 'Save' and 'Cancel' buttons. A red '*Required' label is at the bottom left.

Figure 52: User Must Change First Password

Pharmacy Edit

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



The 'Pharmacy Edit' form is part of a larger application with tabs for 'Admin', 'Transactions', 'Reports', 'My Profile', and 'Help'. The 'Pharmacy Edit' tab is selected. Below the tabs are links: 'List Users', 'Add User', 'Pharmacy Edit', 'Product List', and 'New Product Request'. The form contains several input fields: '* Name:' (Drug World), '* Address1:' (444 Market St), 'Address2:' (address2), '* City:' (Louisville), '* State:' (Kentucky), '* Postal Code:' (40223), '* Phone:' (502 555-5555), '* Fax:' (502 555-5555), and 'Email:' (dw@dworld.com). At the bottom are 'SAVE' and 'CANCEL' buttons. A red '*Required' label is at the bottom left.

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).

The screenshot shows a web application interface for managing a product list. At the top, there are navigation tabs: Admin, Transactions, Reports, My Profile, and Help. Below these, a sub-navigation bar includes List Users, Add User, Pharmacy Edit, Product List (which is highlighted), and New Product Request. The main content area is divided into two panels. The left panel, titled 'Master Product List', contains a search box labeled 'Enter Product Description or UPC Code (at least 3 letters/digits):' and a 'Printable Report' button. The right panel, titled 'Your Product List', displays a table of products. The first row is bolded and has no checkbox, indicating it cannot be removed. Subsequent rows have checkboxes and are not bolded. A 'REMOVE SELECTED' button is located at the bottom right of the product list.

Your Product List		Printable Report
Items listed in Bold cannot be removed.		
305730180108	0.61g	ADVIL COLD&SIN CAP (20'S)
☐ 30031-2240-218	0.35g	CHILDREN'S DIMETAPP DM COLD AND COUGH (4Z)
☐ 300450902047	0.35g	CHLD MOTRIN CLD BR (4Z)
☐ 041100802170	2.40g	CLARITIN D 12HR (20CT)
☐ 041100802897	3.60g	CLARITIN D 24HR (15CT)
☐ 041100802088	1.20g	CLARITIN-D 12 HOUR (10CT)
☐ 041100803191	3.60g	CLARITIN-D 12 HOUR (30CT)
☐ 04110080431	2.40g	CLARITIN-D 24 HOUR (10CT)
☐ 04110080493	1.20g	CLARITIN-D 24 HOUR (5CT)
☐ 300850147031	2.40g	DRIXORAL CLD&ALRGY (20S)
☐ 363824057187	1.08g	MUCINEX D (18CT)

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

- 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).

The screenshot shows the 'Product List' tab in the Retail Portal. On the left, the 'Master Product List' section has a search box with 'sud' entered. Below the search box, three products are listed with checkboxes: 300810862820 (0.35g SUDAFED CHLD DECON (4Z)), 00819600-01 (0.36g SUDAFED SEVERE COLD (12 CNT)), and DAVENEWPRODUCT2 (0.72g SUDAFED TABS (24'S)). At the bottom of this section is an 'ADD SELECTED' button. On the right, the 'Your Product List' section shows a list of products with checkboxes. The first product, 305730180108 (0.61g ADVIL COLD&SIN CAP (20'S)), is bolded. Below it are several other products including CHILDREN'S DIMETAPP DM COLD AND COUGH (4Z), CHLD MOTRIN CLD BR (4Z), CLARITIN D 12HR (20CT), CLARITIN D 24HR (15CT), CLARITIN-D 12 HOUR (10CT), CLARITIN-D 12 HOUR (30CT), CLARITIN-D 24 HOUR (10CT), CLARITIN-D 24 HOUR (5CT), DRXORAL CLD&ALRGY (20S), and MUCINEX D (18CT). At the bottom of this section is a 'REMOVE SELECTED' button.

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

- 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:

- From the Admin Tab, click Product List.
- Check the checkboxes next to the products you want to remove from **Your Product List** (Figure 55 on page 39).
- 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.

The screenshot shows the 'New Product Request' form. At the top, there is a navigation bar with tabs: Admin, Transactions, Reports, My Profile, and Help. Below this is a sub-navigation bar with links: List Users, Create User, Pharmacy Edit, Product List, New Product Request (highlighted), and Scanner Configuration. The main form area is titled 'Request New Product Entry' and contains the instruction: 'Please fill out the following information to submit a new product request.' The form fields are: '12-digit Product UPC' (text input), 'NDC' (text input), 'Product Description' (text input), 'Product Type' (dropdown menu with '--Select Product Type--'), 'Pill Count' (text input), 'Total PSE (3.600g max gram amount)' (text input), and 'Notes' (text area). A red asterisk is placed next to the first five fields, indicating they are required. At the bottom left, there is a red label '*Required'. At the bottom right, there are two buttons: 'SUBMIT' and 'CANCEL'.

Figure 56: New Product Request

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

The screenshot shows the 'New Product Request' form in a web application. At the top, there are tabs for Admin, Transactions, Reports, My Profile, and Help. Below the tabs is a navigation bar with links: List Users, Add User, Pharmacy Edit, Product List, and New Product Request. The main content area displays a red message: 'Product request saved successfully.' Below this, there are several input fields with red asterisks indicating they are required: '12-digit Product UPC' (value: 1234-5678), 'NDC' (empty), 'Product Description' (value: Psuedoflex), 'Product Type' (dropdown menu showing 'Tablet'), 'Pill Count' (value: 24), 'Total PSE (g)' (value: 1.0), and 'Notes' (value: Only available from Canada.). At the bottom left, there is a red label '*Required'. At the bottom right, there are two buttons: 'SUBMIT' and 'CANCEL'.

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.

The screenshot shows the 'Scanner Configuration' page in a web application. At the top, there are tabs for Admin, Transactions, Reports, My Profile, and Help. Below the tabs is a navigation bar with links: List Users, Create User, Pharmacy Edit, Product List, New Product Request, and Scanner Configuration. The main content area has a red message: 'No active scanner is selected for this session. You may select the active scanner by checking the box corresponding to your scanner or you may select it on the transaction page.' Below this, there is a section titled 'Registered Scanners' with a table of scanners configured for the pharmacy. The table has columns: 'Scanner Name (Alias)' and 'Scanner S/N'. Below the table, there is a note: '* Check this for the scanner that you want to use for transactions on this PC during this login session.' Below the 'Registered Scanners' section, there is a section titled 'Add Scanner' with instructions for adding a new scanner. The instructions include: 'If you haven't done so already, please complete the installation instructions for your Honeywell Compatible Hand Held Scanner located [here](#).' and 'After completing the installation instructions for your Honeywell Scanner, follow these steps to register the scanner.' The steps are: 1. Make sure the scan monitor client is installed on your PC and is running. If the scan monitor client is not already running, you can enable the client software by following these steps: 1. Make sure the scanner is plugged in. 2. Go to Start > All Programs > Retail Portal Device Controller > Retail Portal Device Controller. 3. You should see a "READY TO SCAN" message in the Scan Monitor window. 2. Scan the barcode below directly from this screen or by printing this page out. 3. After you hear the two beeps, click the 'Add Scanner' button below. Your scanner should then appear above with a confirmation message. 4. Repeat instructions to add another scanner. Below the instructions is a barcode and an 'Add Scanner' button.

	* Use for this login	Scanner Name (Alias)	Scanner S/N
1	☐	LOADTESTDONTUSE	loadtestscanner
2	☐	BLACK	asdfasdfasdf
3	☐	ANGIES TEST GUN	08227A207D
4	☐	Scanner1-Dave	09194B0A29
5	☐	Angie's Test Blue	08044A022B
6	☐	Jeff's Xenon	10102A001F
7	☐	Angie's Xenon	10341B044F

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.

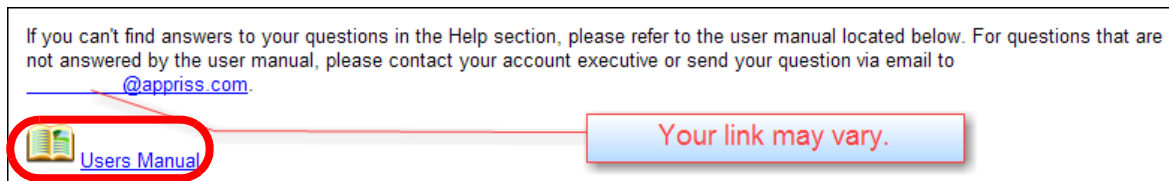


Figure 59: Users Manual

Help - Manual Calculation

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

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

Figure 60: Calculating Total Grams

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


$$\begin{array}{l} \frac{1 \text{ box of 24 Tablets} \times 30 \text{ mg. PSE per Pill}}{1000} = .72 \text{ Total Grams PSE} \\ \frac{2 \text{ boxes of 24 Tablets} \times 30 \text{ mg. PSE per Pill}}{1000} = 1.44 \text{ Total Grams PSE} \\ \frac{3 \text{ boxes of 24 Tablets} \times 30 \text{ mg. PSE per Pill}}{1000} = 2.16 \text{ Total Grams PSE} \end{array}$$

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.

[illegible]

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.

Questions or Feedback?

For currently registered users who have questions, please contact the Appriss Operations Center at aocd@appriss.com.

 Do you have any ideas or suggestions on how to improve this service?
We would love to hear from you. Simply click the icon to link to our feedback website.

Figure 63: Contact - Questions or Feedback

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

Appriss
Feedback

Tell us what you think! Your opinions and comments are very important to Appriss.
Due to a high volume of mail, we're not always able to provide a personal response, but we do read and appreciate all feedback.

Select feedback category: [from the dropdown menu]
Choose a feedback Category [v]

Your Message: [complete all the fields below]

First Name: [yellowed out]
Last Name: [yellowed out]
Email: [yellowed out]
Message: [text area]

Close Reset Submit

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



Drug Facts	
Active ingredient (in each caplet) Pseudoephedrine HCl 240 mg.	Purpose Nasal decongestant
Uses	
- temporarily relieves nasal congestion due to the common cold, hay fever or other upper respiratory allergies, and nasal congestion associated with sinusitis - reduces swelling of nasal passages - relieves sinus pressure	
Stop use and ask a doctor	
- symptoms do not improve after 7 days of use - you get nervous or dizzy - you experience vomiting	
If pregnant or breastfeeding, stop use and ask a doctor before use.	
Keep out of reach of children.	

$$(5 \text{ Pills} \times 240\text{mg}) / 1000 = 1.2 \text{ grams}$$

Drug Facts	
Active ingredients (in each caplet) Acetaminophen 325 mg. Dextromethorphan HBr 15 mg. Guaifenesin 200 mg. Pseudoephedrine HCl 30 mg.	Purpose Pain reliever/fever reducer Cough suppressant Expectorant Nasal decongestant
Uses	
- temporarily relieves these cold symptoms: - cough - headaches - helps loosen phlegm (mucus) and thin bronchial secretions to make coughs more productive - temporarily reduces fever - sore throat - minor aches and pains - nasal congestion	
Stop use and ask a doctor	
- when using this product, you do not exceed recommended dose - stop use and ask a doctor if: - symptoms persist for more than 7 days - fever gets worse or lasts more than 3 days - redness or swelling is present - new symptoms occur - you get nervous, dizzy, or lightheaded - cough comes back or does not improve	
If pregnant or breastfeeding, stop use and ask a doctor before use.	

$$(24 \text{ Pills} \times 30\text{mg}) / 1000 = .72 \text{ grams}$$

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