PMP Web Center
User Guide
Version 4.1

OptimumTechnology

Copyright Statement

Introduction

Table of Contents

Web Center Basics

Chapter 1: Understanding the Web Center

Overview

Introduction

The Web Center is a software system for sharing information on suspected persons and for receiving and responding to requests for information on prescriptions to patients. Pharmacists, practitioners and law enforcement officers are the primary users of the site. The users can request patient or practitioner prescription reports from the administrator to support their investigations and also issue alerts to other users on suspected prescription abusers.

The Web Center facilitates the following functions:

- File and track a request for a patient prescription report online
- File and track a request for practitioner prescription report online
- Respond to the prescription report requests and track the responses online
- Post an alert on a suspected person to all portal users of a specific region
- Distribute an alert on a suspected person to specific types of users within specific regions by email or fax
- View such alerts and respond to the alerts online
- Distribute notifications to specific types of users in specific regions by email or fax

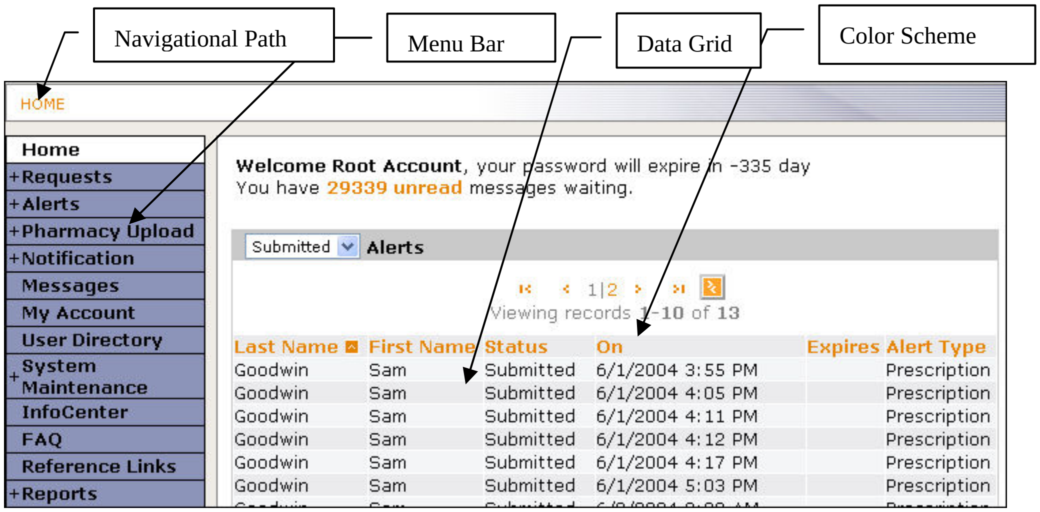
Contents

This chapter contains the following topics:

Conventions and Navigational Features

Introduction

This section describes the Web Center's conventions and how to use the navigational features.



Color Scheme

Navigational and action links, buttons, and icons are represented by a color you specify as part of customizations.

Menu Bar

Displays the main sections. Administrators assign privileges, which grant you access rights to certain sections of the portal. Menu items with a plus sign (+) contain subordinate menu items. Click the plus sign to open the menu item's drop-down menu. When you open a drop-down menu, the plus sign becomes a minus sign (-). Click the minus sign to close the drop-down menu.

Navigational Path

Links that are located below the heading. A double colon (::) separates each area to reflect the hierarchy of where you are in the portal. To navigate to a particular section, click the name of the section in the navigational path.

Data Grid

Used throughout the portal to provide a list of items, such as names, agencies, jobs, etc. You can select an item from the Data Grid to view and modify its information.

Continued on next page

Conventions and Navigational Features, Continued

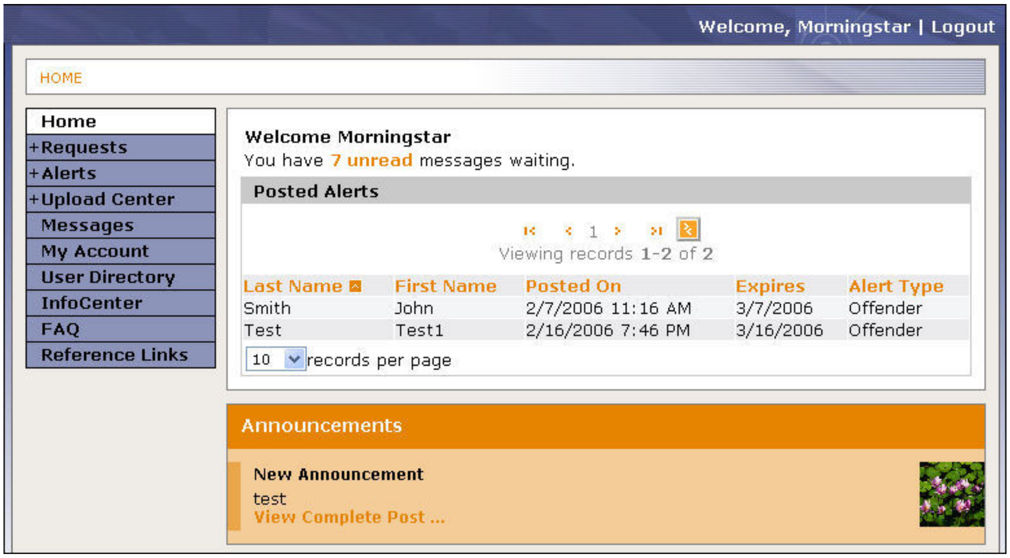
Navigational Features

Icon	Features	Description
	Display next page	Displays the next page of items.
	Display last page	Displays the last page of items in the database.
	Display previous page	Displays the previous pages recently visited.
	Display first page	Displays the first page in the database.
	Refresh Data Grid	Refreshes the list of items on the Data Grid that the user is viewing.
	Delete	Permanently deletes an item from the Data Grid.
10	Records per page	Selects the number of items to be displayed on a page. For example, if 10 is selected from the record per page drop-down menu, then ten items appear on each page displayed in the Data Grid.
	Sort by column heading (users can click a column heading in the Data Grid)	Sorts the items in a column alphabetically and numerically. The up arrow icon displays items alphabetically from A-Z and numerically in ascending order. The down arrow icon displays items that are sorted alphabetically from Z-A and numerically in descending order.

The Home Page

Introduction

The Home Page shows posted alerts, news headlines, announcements and memos that apply to the logged-in user.



Unread Requests Message

The Unread Requests message, displayed below the Welcome message, is a direct link to your View Requests page that lists the requests for information you've received as well as submitted.

Accessing Unread Requests from the Home Page

To view your Unread Requests, click the number of unread "requests waiting" that is displayed in color. Your Requests page then appears, with the drop-down menu that controls the type of Requests displayed set to "Unread".

Continued on next page

The Home Page, Continued

Alerts

Alerts are notices of identified persons under investigation for pharmaceutical abuse who may attempt to obtain drugs at your location. Posting copies of these notices warns your employees of the existence of these persons and aids in the related criminal investigations. All known descriptive information about the person is posted in the alert. You may or may not be able to see alert information on your Home Page, depending on the security profile assigned to you by the Administrator or whether any alerts have been posted. Alerts can also be on prescriptions received by pharmacies where the entire information on the prescription is sent out as an alert.

Viewing Listed Alerts

All alerts that you can view appear in the Data Grid on the Home Page. If you click an individual item on the list, the Alert Detail is displayed.

News Headlines

News Headlines hold web links to various articles that may be of interest.

Selecting News Items

In order to read the news items listed on the Home Page, click the View Complete Post link displayed in color at the bottom of the summary. The News Post Details screen appears, with the text of the news item shown in the Body section of the screen.

Memos and Announce-ments

Memos and Announcements hold reminders or miscellaneous information that has been distributed to users of the Web Center by the Administrator.

Accessing Memos

Memos appear on the Home Page exactly as News Items do. Click the **View Complete Post** link displayed in color to navigate directly to the News Post Details screen containing the Memo information.

Accessing Announce-ments

Announcements appear on the Home Page exactly as News Items do. Click the **View Complete Post** link displayed in color to navigate directly to the News Post Details screen containing the Announcement information.

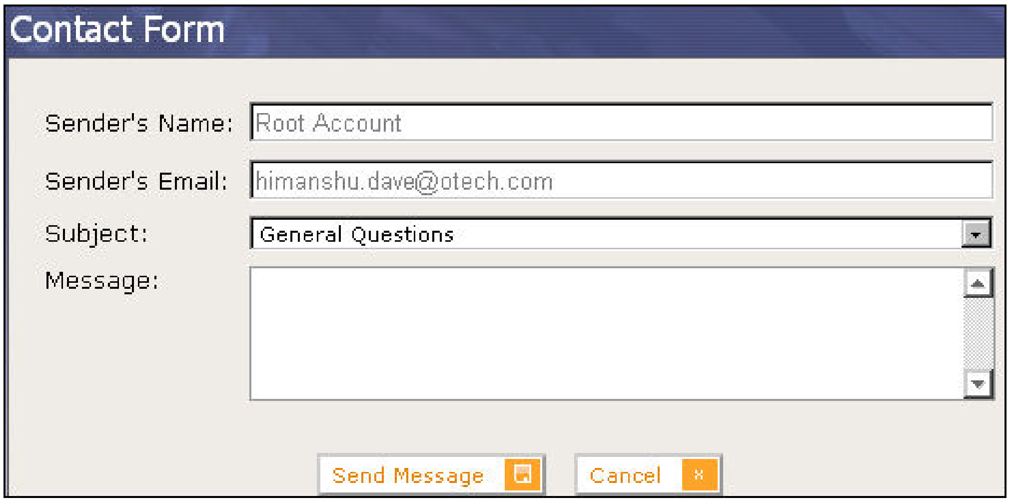
Continued on next page

The Home Page, Continued

Contact Us

Click the **Contact Us** link from any page within the application to contact an administrator.

Result: The Contact Form appears.



From the **Subject** drop-down menu, select an appropriate subject line. Enter your message and then click the **Send Message** button.

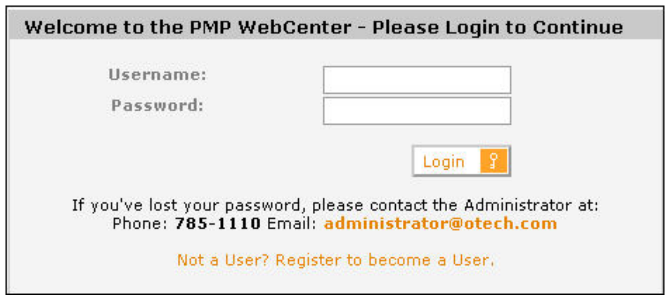
Registering to Become a User

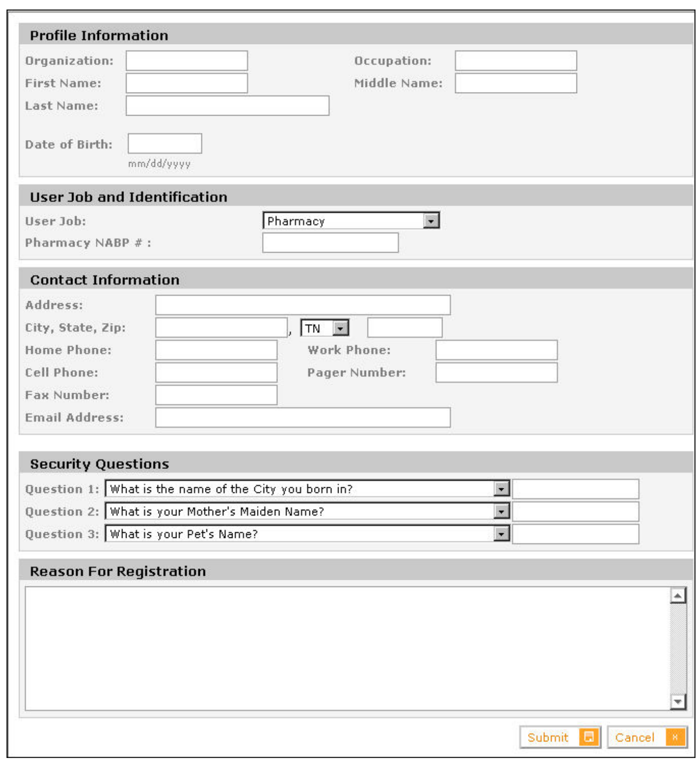
Introduction

Prior to having access to the Web Center, a user must first register to become a user. This registration is then sent to the administrator for approval or denial.

Procedure

Follow the steps in the table below to register to become a user.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Not a User? Register to become a User link.


Result: The User Registration page appears.

</td></tr>
</table>

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Registering to Become a User, Continued

Procedure (continued)

Step	Action
2	In the **Profile** section, enter the appropriate information. **Note**: The **Last Name** field is required.
3	In the **User Job and Identification** section, from the **User Job** drop-down menu, select your User Job title. **Notes**: • The User Job field is required. • Selecting certain job title prompts the identifier field to appear. If the job title that you select prompts identifier fields to appear, these fields are required. Example: Selecting Law Enforcement as a job title would prompt the **Badge Number** field to appear.
4	In the **Contact Information** section, enter the appropriate contact information.
5	In the **Security Questions** section, select a question from each of the drop-down menus and provide the answer in the corresponding fields. **Note**: All three fields are required.
6	In the **Reason for Registration** section, enter the reason for this registration.
7	Click the **Submit** button.

End User Functions

Chapter 2: Requests

Overview

Introduction

Requests are a key feature of the Web Center. The Requests option gives you the ability to obtain utilization information on patients or prescription information on practitioners from the Administrator, depending on your access rights. To maintain data security, Web Center users are not granted direct access to the data they need; instead, you initiate a Request to the Administrator, who runs the appropriate report on the data that is maintained and returns the results to you.

PMP Information Exchange

The PMP Information Exchange (PMIX) is an interface that works in conjunction with your local PMP. The PMIX interface is not visible to the PMP user. The interface extends the local PMP systems capability by making out-of-state prescription data available to the local PMP system.

The end user will have the option to select participating states when submitting a request. The participating states are predetermined by your administrator.

Note: Not all PMP users have PMIX functionality. If you have any questions, please contact your administrator.

Continued on next page

Overview, Continued

Contents

This chapter contains the following topics:

Understanding Supervisor User/Delegate User Relationships

Introduction

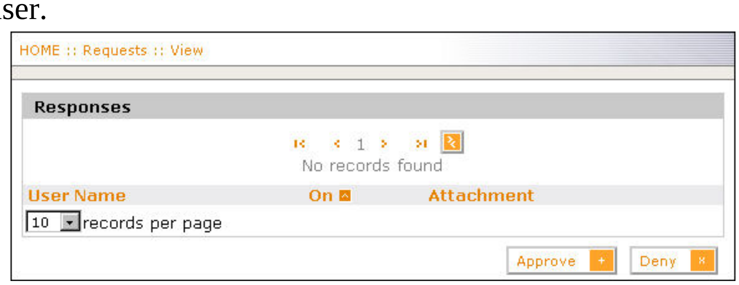
PMP supports different levels of authority and allows for a reporting structure. This reporting structure is created when the user account is created. The reporting structure allows for an individual to be designated as a supervisor user and have delegate users assigned to them.

This structure determines how requests that are submitted by delegate users are routed through the system and whether a request requires a supervisor's approval or not.

The supervisor/delegate relationship supports three different types of users:

- Supervisor user: A user who supervisors one or more delegate users. A supervisor user is responsible for their delegate user's actions. Requests submitted by a supervisor user follow the normal request flow. Requests sent by a supervisor user's delegates can be viewed on the Request View page under the Requests Sent by Delegates section. **Note**: Use the drop-down menu to select a particular delegate user or use the default value of **All** to see requests from all of your delegate users.
- Independent user: A user who is not a supervisor user or a delegate user and does not require supervision. Requests submitted by an independent user follow the normal request flow.
- Delegate user: A user who reports to one or more supervisors and may or may not require supervision.
  - A request that is submitted by a delegate user is seen by their assigned supervisor user.
  - A request that is submitted by a delegate user who requires supervision must be either approved or denied by a supervisor user
  - A request that is submitted by a delegate user who does not require supervision is seen by the supervisor user but is not approved or denied by the supervisor user.

The following image is an example of a portion of the Requests View page. The **Approve** and **Deny** button appear if the request has been submitted by a delegate user.



Submitted Request Statuses

Introduction

The status of a submitted request changes throughout the fulfillment process. The status of a request is dependent on the following factors:

- Where it is in the fulfillment process.
- If it met the threshold values.
- If it requires supervisory attention.

During the fulfillment process a request can have any of the following statuses:

- **Unread**: The request has not been read.
- **Pending**: The request is pending.
- **Expired**: The request is expired.
- **Ready**: The request has been fulfilled and is ready.
- **Delayed/Under Review**: The request is waiting for manual processing; the request exceeded the threshold values.
- **Auto Fulfilled**: The request has been automatically fulfilled; it met the threshold values and did not require supervisory review.
- **Supervisory Review**: The request has been submitted by a delegate user and is waiting for a supervisory review.
- **Supervisor Denied**: The request has been submitted by a delegate user and has been denied by a supervisor.
- **Responded**: The request has been submitted; the administrator has responded, but not fulfilled the request. The administrator may require more information on the request.
- **Revoked**: The request has been fulfilled but the Patient Rx History Report has been revoked by the administrator.
- **All**: View all of the requests.
- **Partially Fulfilled**: This status is only for PMIX enabled users. The request has been fulfilled by some, but not all, of the states.

Viewing Requests

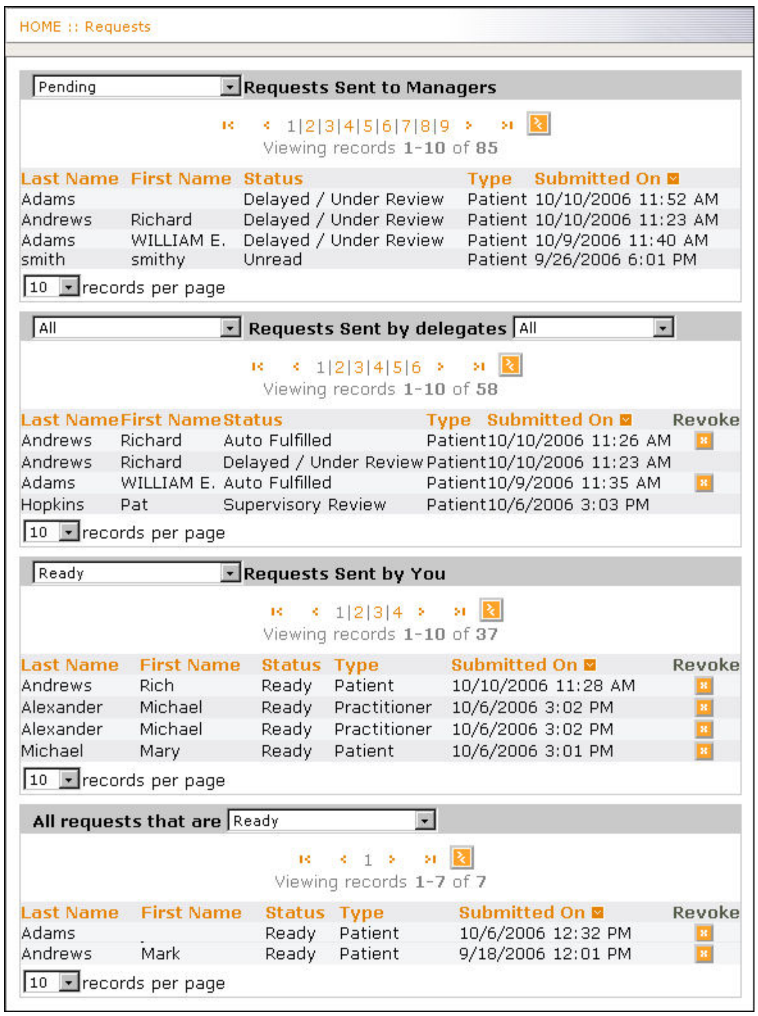
Introduction

View Requests shows you the status of all requests that you have initiated or received.

Procedure

Follow the steps in the table below to view requests.

Step	Action
1	From the main menu, click **Requests**.
2	Click **View**. **Result**: The Requests page appears.



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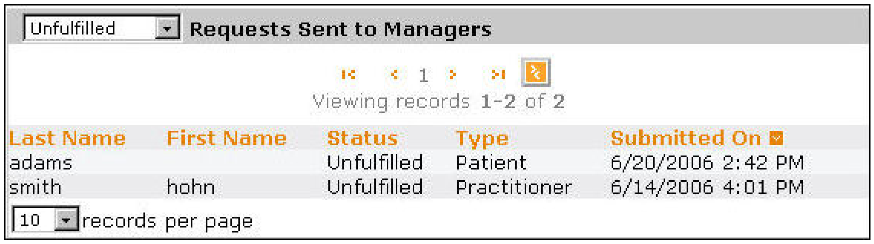
Viewing Requests, Continued

Procedure (continued)

Step	Action
3	From the drop-down menu, select the type of request that you want to view. **Result**: All requests that correspond to the type that was selected appear in the grid.  **Note**: Click any of the column headers to sort the rows in the grid by the data in the column. An up or down arrow appears to show the order in the primary sort column.

Requests Page Descriptions

Requests Page Descriptions

Field/Button	Description
Requests Sent to Managers	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Pending • Expired • Delayed/Under Review • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or practitioner.
Submitted On	Indicates the day and time that the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Continued on next page

Requests Page Descriptions, Continued

Requests Page Descriptions (continued)

Field/Button	Description
Requests Sent By Delegates (This section only appears for a supervisor user with delegates.) **Note**: Use the drop-down menu to select a particular delegate user or use the default value of **All** to see requests from all of your delegate users.	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Pending • Expired • Auto Fulfilled • Supervisory Review • Supervisor Denied • Delayed/Under Review • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or practitioner.
Submitted On	Indicates the day and time that the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

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Requests Page Descriptions, Continued

Requests Page Descriptions (continued)

Field/Button	Description
Requests Sent By You	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Expired • Ready • Responded • Revoked • All • Partially Fulfilled (PMIX)
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or practitioner.
Submitted On	Indicates the day and time that the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Continued on next page

Requests Page Descriptions, Continued

Requests Page Descriptions (continued)

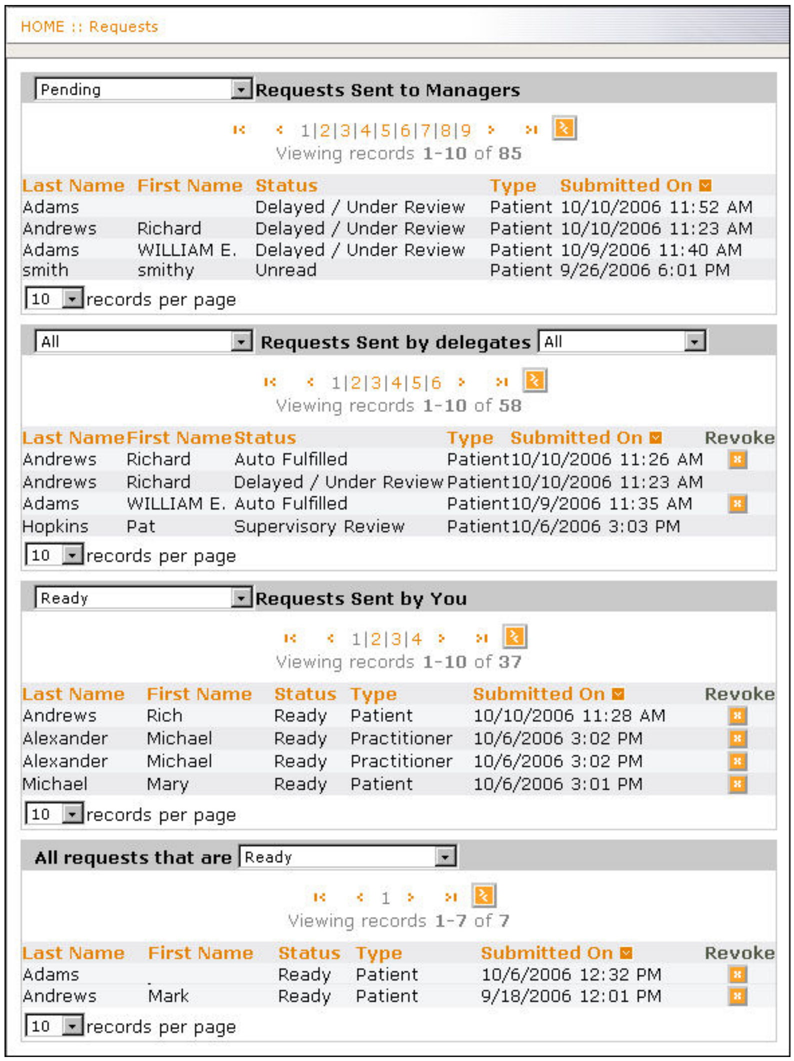
Field/Button	Description
All Requests that are	
Drop-down Menu	The drop-down menu allows you to view requests by status type. The status types include: • Unread • Expired • Ready • Delayed/Under Review • Auto Fulfilled • Supervisory Review • Supervisor Denied • Responded • Revoked • All • Partially Fulfilled
Last Name	The last name of the patient for whom a request has been generated.
First Name	The first name of the patient for whom a request has been generated.
Status	Indicates the status of the request.
Type	Indicates whether the request is for a patient or practitioner.
Submitted On	Indicates the day and time that the request was submitted.
Request Type (PMIX)	PMIX In: Indicates that a request is from another state. PMIX Out: Indicates that a request is being sent to another state.

Viewing Request Details

Procedure

Follow the steps in the table below to view request details.

Step	Action
1	From the main menu, click **Requests**.
2	Click **View**. **Result**: The Requests page appears.



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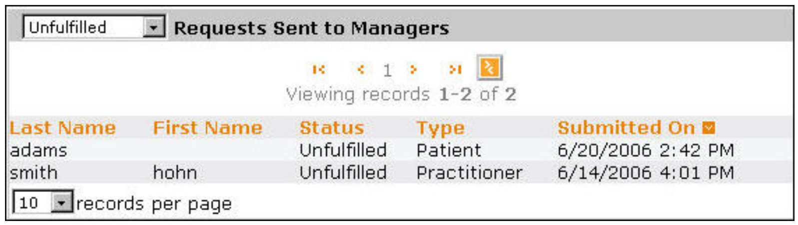
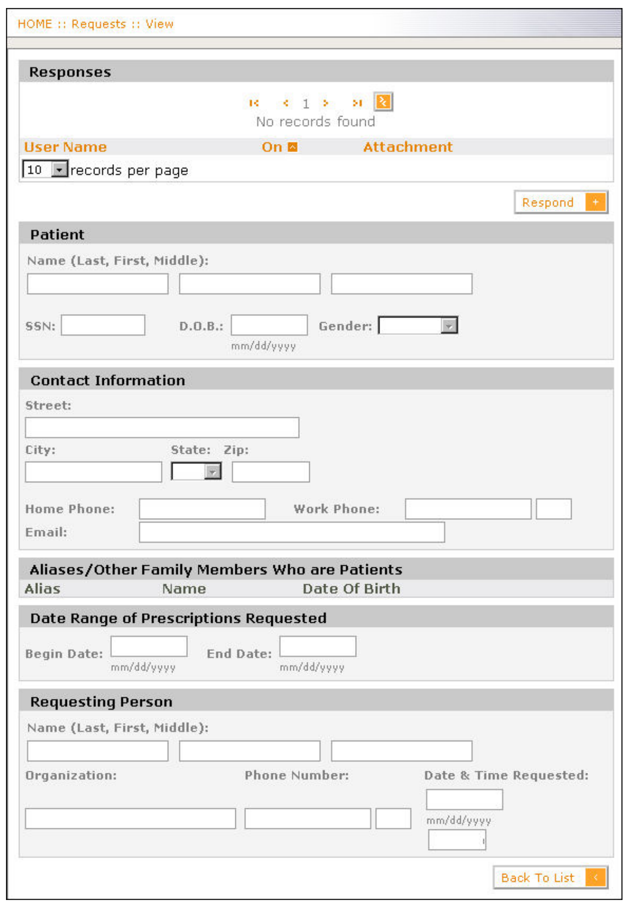
Viewing Request Details, Continued

Procedure (continued)

Procedure

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
From the drop-down menu, select the type of request that you want to view.
Result: All requests that correspond to the type that was selected appear in the grid.


</td></tr>
<tr><td>4</td><td>
Click the request row to view the details of the request.
Result: The View page appears.


</td></tr>
</table>

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Viewing Request Details, Continued

Responding to a Request

You can respond to a request you received (fulfilled or not) by clicking the **Respond** button. This action initiates the display of the **Response** field. Enter the text of your response and click **Save** to send it to the other party, such as an Administrator. If you decide not to send the response, click **Cancel** to return to the text of the request.

View Request Detail Page Descriptions

View Requests Detail Page Descriptions

Field/Button	Description
Responses (only appears if a response has been submitted)	
User Name	Name of the person who composed the response.
On	Date of the response.
Attachment	Any file attached to the response. This usually contains the request results.
Delete button	If you click this button, you can delete any response sent directly to you.
Current Response	The text of the current response selected from the Response data grid.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or the practitioner's name.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

View Request Detail Page Descriptions, Continued

View Requests Detail Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Name	The name of another family member who may have received similar prescriptions for whom the requestor wants information.
Date of Birth	The birth date of this family member.
Date Range of Prescriptions Requested	
Begin Date	The beginning date for the range of prescriptions requested from the Administrator.
End Date	The end date for the range of prescriptions requested from the Administrator.
Requesting Person Detail	
Name	The name of the person who requested the information.
Organization	The organization, if any, with which the requester is associated.
Phone Number	The telephone number where the requesting person can be reached.
Date/Time Reported	The date and time the request was initiated.

Requests Sent by You Section

Field/Button	Description
Requests Sent Type	Select the type of Requests Sent that you want to see using this drop-down menu.
Data Grid Column Headings	
Last Name	Last name of the subject of the request (patient or practitioner).
First Name	First name of the subject of the request (patient or practitioner).
Status	The status of the request.
Type	The type of request.
Submitted On	The date and time the request was submitted.

View Sent Request Detail Page Descriptions

View Sent Requests Detail Page Descriptions

Field/Button	Description
Responses (only appears if a response has been submitted)	
User Name	Name of the person who composed the response.
On	Date of the response.
Attachment	Any file attached to the response. This usually contains the request results.
Delete button	If you click this button, you can delete any response sent directly to you.
Current Response	The text of the current response selected from the Response data grid.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or the practitioner's name.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The first line of the street address or name of the person receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

View Sent Request Detail Page Descriptions, Continued

View Sent Requests Detail Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Name	The name of the family member of the patient whose prescriptions you are additionally requesting.
Date of Birth	The birth date of this family member.
Date Range of Prescriptions Requested	
Begin Date	Enter the beginning date for the range of prescriptions you are requesting from the database.
End Date	Enter the end date for the range of prescriptions you are requesting from the database.
Reporting Person Detail	
Name	The name of the person who reported the patient or practitioner.
Organization	The organization, if any, with which this person is associated.
Phone Number	The telephone number where the reporting person can be reached.
Date/Time Reported	The date and time the report was initiated.
Responses	
User Name	The name of the user or Administrator who composed the response.
On	The date and time of the response.
Attachment	The name of any attached file to the response. Click to download the file to your PC.
Current Response	
Response Text	The text of the displayed response.

Unsolicited Requests Received

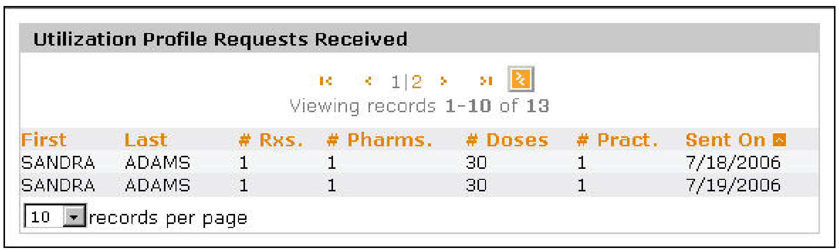
Introduction

Unsolicited Requests Received are sent to pharmacies and practitioners for a person that they have previously served. This unsolicited request informs the pharmacy or practitioner about prescription usage.

When a PMP administrator receives an unsolicited request, the system or the administrator fulfills the requests and then sends a cover letter and the patient utilization report to every practitioner and pharmacy on the report.

Procedure

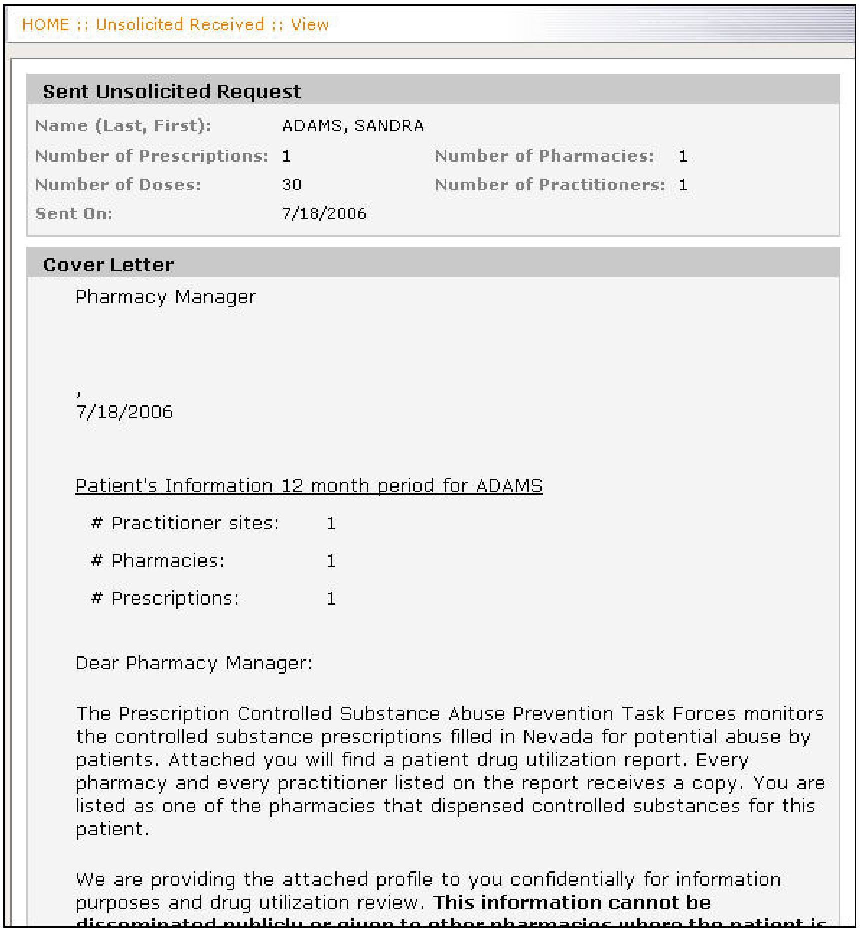
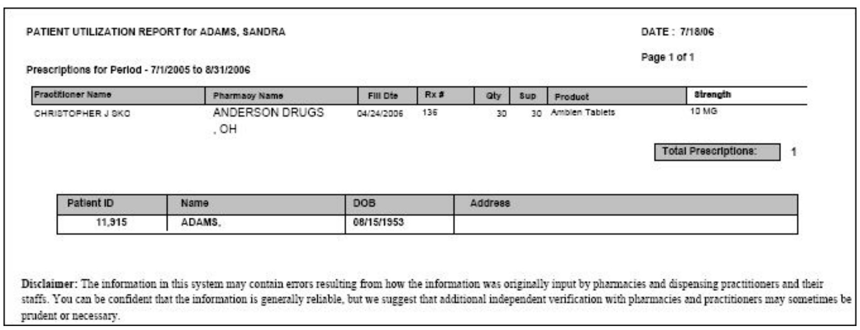
Follow the steps in the table below to view your unsolicited requests received.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Requests.</td></tr>
<tr><td>2</td><td>Click Unsolicited Received.
Result: The Unsolicited Requests Received page appears.

</td></tr>
</table>

Continued on next page

Unsolicited Requests Received, Continued

Procedure
(continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on a patient in the data grid to view the cover letter.

</td></tr>
<tr><td>4</td><td>Click the View Report button to view the Patient Utilization Report.

</td></tr>
</table>

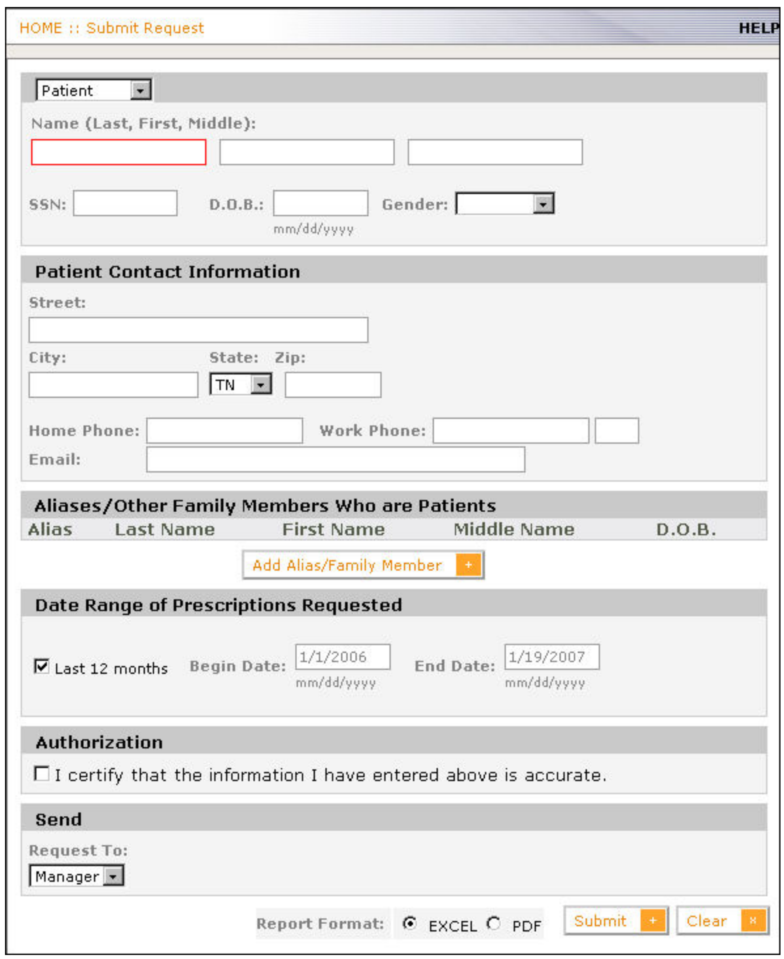
Submit Requests

Introduction

The Submit Requests option provides the ability to enter requests to the Administrator for patient or practitioner reports. These reports are actually queries against the database that generate a set of prescription data based on the name and/or aliases.

Procedure

Follow the steps in the table below to submit a request.

Step	Action
1	From the main menu, click **Requests**.
2	Click **Submit**. **Result**: The Submit Request page appears 

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Submit Requests, Continued

Procedure (continued)

Step	Action
3	From the drop-down menu, select the request type, Patient or Practitioner. **Note**: If Practitioner is not a value that is available, then you are not approved for practitioner inquires.
4	Complete as much identifying information as you can on the patient or practitioner. The more you include, the more accurately this person can be identified in the database.
5	Check the Authorization box at the end of the form. **Note**: The Request will not be submitted without authorization.
6	Click **Submit** to send the Request to the Administrator.
7	Click **Clear** to remove all data and start over.

Submit Request Details Page Descriptions

Submit Request Details Page Descriptions

Field/Button	Description
Request Type	In the heading, select the type of request you are submitting.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or practitioner's name that issued the prescriptions, in Last, First, Middle format.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

Submit Request Details Page Descriptions, Continued

Submit Request Details Page Descriptions (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Add Family Member button	Click this button to add a family member who has also received similar prescriptions.
Name	Enter the family member's name, in Last, First Middle format.
Date of Birth	Enter the birth date of this family member.
Date Range of Prescriptions Requested	
Last 12 Months	Check this box to auto-fill the date range with values reflecting a range that begins on the first of the 12th full month prior to the current date and ending today. **Example**: A date range completed on February 10, 2004, the auto-fill Begin Date is February 1, 2003 and the auto-fill End Date is February 10, 2004.
Begin Date	Enter the beginning date for the range of prescriptions.
End Date	Enter the end date for the range of prescriptions.
Authorization	
Authorization Check Box	Check this box to authorize the request. This is required to initiate the request; the Administrator will not process it without authorization.
Submit button	Click **Submit** to enter the request and send it to the Administrator.
Clear button	Click **Clear** to delete all input and begin again.
Send	
Request To	Drop-down menu that allows the user to specify that this is a request to multiple users.
Regions	Select the region.
All	Select this box if the request should be sent to all users in all the regions that were selected.
Users	Select all the users the request should be sent to (if All was not selected).

Submit Request/PMIX Enabled

Introduction

The PMP Information Exchange (PMIX) is an interface that works in conjunction with your local PMP. The PMIX interface is not visible to the PMP user. The interface extends the local PMP systems capability by making out-of-state prescription data available to the local PMP system.

The end user will have the option to select participating states when submitting a request. The participating states are predetermined by your administrator.

Note: Not all PMP users have PMIX functionality. If you have any questions, please contact your administrator.

The Submit Requests option provides the ability to enter requests to the Administrator for patient or practitioner reports. These reports are actually queries against the database that generate a set of prescription data based on the name and/or aliases. These requests can be sent to participating states that have been predetermined by your administrator.

Procedure

Follow the steps in the table below to submit a request.

Step	Action
1	From the main menu, click **+Requests**.

Continued on next page

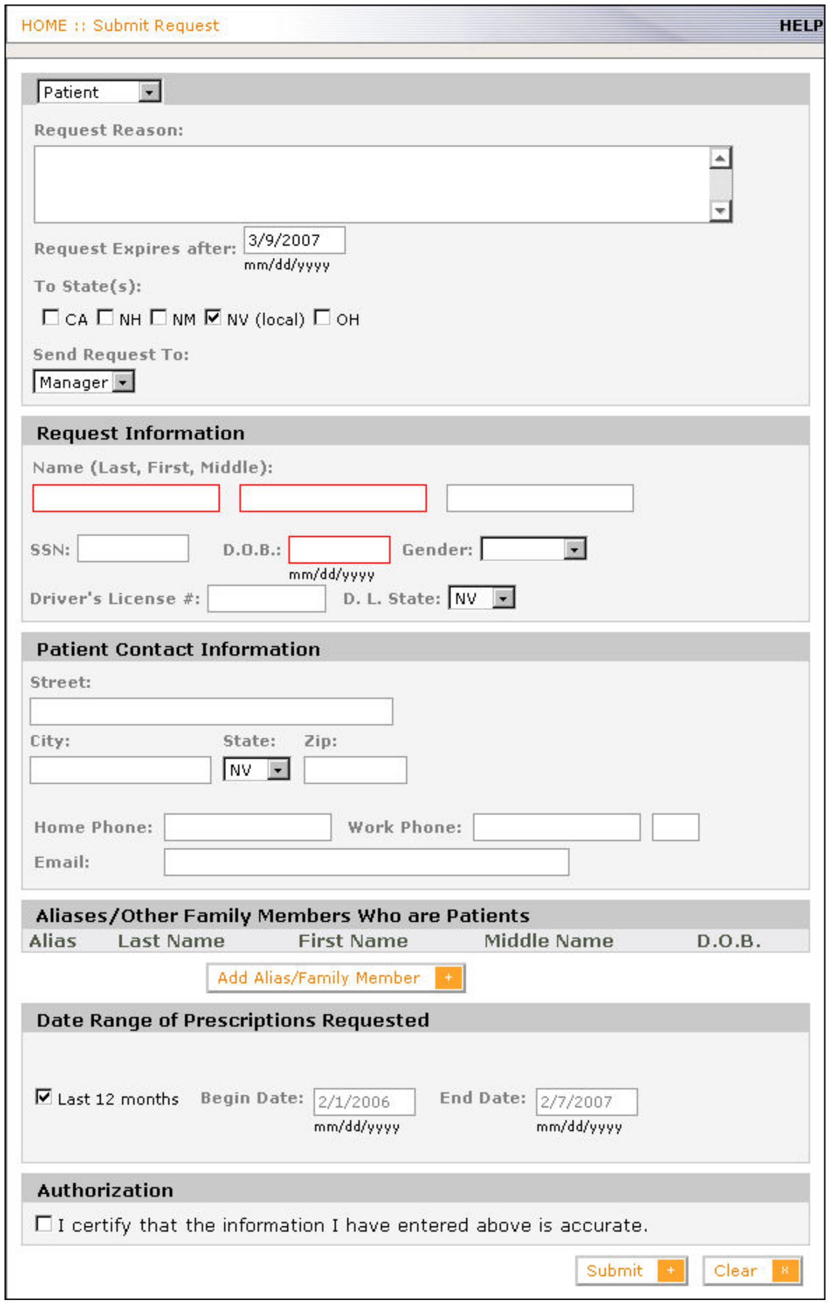
Submit Request/PMIX Enabled, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

Click **Submit**.

Result: The Submit Request page appears.

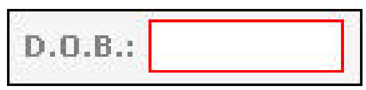


</td></tr>
</table>

Continued on next page

Submit Request/PMIX Enabled, Continued

Procedure (continued)

Step	Action
3	From the drop-down menu, select the request type. Patient or Practitioner. **Note**: If Practitioner is not a value that is available, then you are not approved for practitioner inquiries.
4	In the **Request Reason** text box, enter the reason for this request.
5	Select the state(s) that you want to submit this request to. **Note**: Different states may have different field requirements on the rest of this form. If you choose a state that has specific requirements, the field will have a red border around it to indicate that this is a required field. Example: California may require the date of birth on this form, or Ohio may require a street address. When you select the state, PMP applies a red border around the field. 
6	Complete as much identifying information as you can on the patient or practitioner. The more information you include, the more accurately this person can be identified in the database.
7	Check the **Authorization** box at the end of the form. **Note**: The Request will not be submitted without authorization.
8	Click **Submit** to send the Request to the Administrator.
9	Click **Clear** to remove all data and start over.

Submit Request/PMIX Enabled Page Descriptions

Submit Request/PMIX Enabled

Field/Button	Description
Request Type	In the heading, select the type of request you are submitting.
Patient or Practitioner Detail	
Name	The name of the patient who received the prescriptions or practitioner's name that issued the prescriptions, in Last, First, Middle format.
SSN	The Social Security Number of the patient. (Does not appear for practitioners.)
Date of Birth	The patient's birth date. (Does not appear for practitioners.)
Gender	The patient's gender. (Does not appear for practitioners.)
DEA #	(For practitioners only) The Drug Enforcement Agency ID number assigned to the practitioner.
Driver's License #	Enter the patient driver's license number. (Does not appear for practitioner.)
D.L. State	Enter state of the driver's license. (Does not appear for practitioner.
Contact Information	
Address (Care of)	The street address or person's name receiving mail for the practitioner. (Does not appear for patients.)
Street	The second line of the street address, if needed.
City	The city where the patient or practitioner resides.
State	The state where the patient or practitioner resides.
Zip	The zip code for the patient or practitioner address.
Home Phone	The patient's home phone number. (Does not appear for practitioners.)
Work Phone	The patient's or practitioner's work phone number.
Email	The patient's or practitioner's e-mail address.

Continued on next page

Submit Request/PMIX Enabled Page Descriptions, Continued

Submit Request/PMIX Enabled (continued)

Field/Button	Description
Other Family Members Who Are Patients (appears on Patient Request only)	
Add Family Member button	Click this button to add a family member who has also received similar prescriptions.
Name	Enter the family member’s name, in Last, First Middle format.
Date of Birth	Enter the birth date of this family member.
Date Range of Prescriptions Requested	
Last 12 Months	Check this box to auto-fill the date range with values reflecting a range that begins on the first of the 12th full month prior to the current date and ending today. **Example**: A date range completed on February 10, 2004, the auto-fill Begin Date is February 1, 2003 and the auto-fill End Date is February 10, 2004.
Begin Date	Enter the beginning date for the range of prescriptions.
End Date	Enter the end date for the range of prescriptions.
Authorization	
Authorization Check Box	Check this box to authorize the request. This is required to initiate the request; the Administrator will not process it without authorization.
Submit button	Click **Submit** to enter the request and send it to the Administrator.
Clear button	Click **Clear** to delete all input and begin again.
Send	
Request To	Drop-down menu that allows the user to specify that this is a request to multiple users.
Regions	Select the region.
All	Select this box if the request should be sent to all users in all the regions that were selected.
Users	Select all the users the request should be sent to (if All was not selected).

Chapter 3: Alerts

Overview

Introduction

Alerts are another key feature of the Web Center. The Alerts option gives you the capability to view and initiate warnings on particular persons suspected of prescription drug abuse in your area. The warnings are posted to every user within the specific geographic area targeted by the Alert. They can then be printed out and the poster displayed within the pharmacy or practitioner's office to notify all staff. This is an important preventive measure that gives maximum exposure to the information in minimal time.

While outstanding Alerts are displayed on the Home Page, more detail is available for view using the Alerts function on the Main Menu. You can even view expired alerts that you initiated.

Contents

This chapter contains the following topics:

Viewing Alerts

Introduction

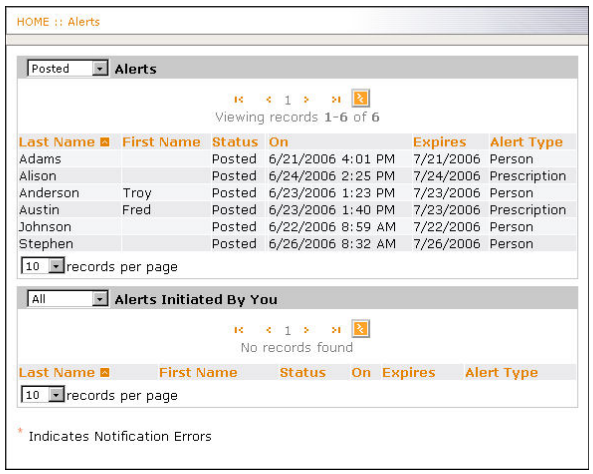
View Alerts shows you the status of all outstanding posted alerts as well as alerts that you have initiated.

Procedure

Follow the steps in the table below to view alerts.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Alerts.</td></tr>
<tr><td>2</td><td>Click View Alerts.

Result: The View Alerts page appears.



Note: All Posted Alerts that are in your queue appear as the top grid on the page. These are alerts that may be sent directly to you, to all users in your region or to all users in the system.</td></tr>
<tr><td>3</td><td>Click a row in the grid to see the alert detail.

Notes:

• To narrow or widen the types of alerts seen in the Alerts Initiated by You grid, change the option in the drop-down menu. The alerts that appear change accordingly.

• No changes can be made to the alert information, but you can print it out for posting by clicking the Print Preview button and then the Print button.

• Click on any of the column headers to sort the rows in the grid by the data in the column. An up or down arrow appears to show the order in the primary sort column.</td></tr>
</table>

Alerts Page Description

Alerts Page Description

Field/Button	Description
Posted Alerts section	
Last Name	Last name of the suspected person.
First Name	First name of the suspected person.
Posted On	The date and time the alert was posted.
Expires	The date and time the alert message expires.
Alert Type	The type of alert – person/ prescription.
Alerts Initiated by You section	
Alerts Sent Type	Select the type of Alerts Sent that you want to see using this drop-down menu.
Listed Alert Column Headings	
Last Name	Last name of the suspect.
First Name	First name of the suspect.
Status	The status of the alert: submitted, posted, rejected or expired.
On	The date and time the alert was posted.
Expires	The date and time the alert expires.
Alert Type	The type of alert – person/ prescription.

Person Alert Details Page Descriptions

Person Alert Details Page Descriptions

Field/Button	Description
Print Preview button	Click the **Print Preview** button to open the Print Preview, which generates a poster of the alert. From there, click the **Print** button to print the poster.
Alerts History	
Status	Shows the history of the alert, when it was submitted and posted.
On	This field shows when this particular status took effect.
By	The person who submitted, posted (approved) or responded to the alert.
Text	The first several words of the response text are displayed. If there is no response on the alert, the column does not appear.
Responding to the Alert	
Respond button	Click **Respond** to open the **Respond** field and enter a response to the alert.
Text	Enter the text of your response to the alert.
Save button	Click **Save** to post the response. It appears immediately in the Alert History section of the current alert.
Cancel button	Click **Cancel** to delete all changes and return to the original alert.
Person	
Name	The name of the person who received the prescriptions, in Last, First, Middle format.
Aliases	Any known aliases the person is using.
SSN	The Social Security Number of the person.
DL#	The person's driver's license number.
DL State	The state that issued the person's driver license.
Age	The person's age or range of possible ages.
Date of Birth	The person's birth date.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
Description	
Sex	The person’s gender.
Race	The person’s race.
Hair Color	The hair color of the person.
Eye Color	The eye color of the person.
Height Range	The actual height (recorded in the first space) or potential height range of the person.
Weight Range	The actual weight (recorded in the first space) or potential weight range of the person.
Physical Description	A physical description of the person, excluding the factors listed above.
Photograph or Sketch	A photograph or sketch of the person (scanned or electronically generated) may be attached to the alert to provide a picture to aid recognition. This section only appears if an image is available.
Address	
Address (Care of)	The street address or name of the other person who receives mail for the suspect.
Street	The second line of the street address, if needed.
City	The city where the person resides.
State	The state where the person resides.
Zip	The zip code for the person address.
Home Phone	The person’s home phone number.
Work Phone	The person’s work phone number.
Vehicle	
Year	The vehicle year of manufacture.
Make	The vehicle make.
Model	The vehicle model.
Style	The vehicle style.
Color	The color of the vehicle.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
License Plate Number	The plate number seen on the vehicle.
Plate State	The state displayed on the license plate.
Suspected Activity	
Alterations	This box is checked if altered prescriptions are suspected.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	This box is checked if prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	This box is checked if prescription drugs were dispensed and the blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	This box is checked if the prescription was forged.
Drugs Involved	
Drug	The suspected prescription drug being abused.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Comments	
Comment Text	Any comments that are associated with this alert are entered.
Contact	
Name	The last, first and middle name of the person who is the contact for the alert.
Organization	The organization with which the contact is associated.
Phone Number	The contact’s telephone number.
Alert Post Info	
Posted Alert Expires On	The expiration date for the alert.
Post to Region(s)	The regions to which this alert posted.

Continued on next page

Person Alert Details Page Descriptions, Continued

Person Alert Details Page Descriptions (continued)

Field/Button	Description
View Broadcast Errors button	If you originated the alert and not all messages were broadcast due to errors in e-mail addresses or fax numbers, click this button to view the errors.
Save button	Click **Save** to save the response.
Cancel button	Click **Cancel** to cancel the changes.

Prescription Alert Details Page Descriptions

Prescription Alert Details Page Descriptions

Field/Button	Description
Print Preview button	Click the **Print Preview** button to open the Print Preview, which generates a poster of the alert. From there, click the **Print** button to print the poster.
Alert History	
Status	Shows the history of the alert, when it was submitted and posted.
On	This field shows when this particular status took effect.
By	The person who submitted, posted (approved) or responded to the alert.
Text	The first several words of the response text are displayed. If there is no response on the alert, the column does not appear.
Responding to an Alert	
Respond button	Click the **Respond** button to open the **Respond** field and enter a response to the alert.
Text	Enter the text of your response to the alert.
Save button	Click **Save** to post the response. It appears immediately in the Alert History section of the current alert.
Cancel button	Click **Cancel** to delete all changes and return to the original alert.
Prescription Detail	
Rx #	The prescription number on the prescription.
Pharmacy Detail	
Pharmacy Name	The name of the pharmacy.
Store #	The store number of the pharmacy.
Manager Name	The name of the pharmacy's manager.
Address (Care of)	The care of address of the pharmacy.
Street	The street address of the pharmacy.
City	The city of the pharmacy.
State	The state of the pharmacy.
Zip	The zip code of the pharmacy.

Continued on next page

Prescription Alert Details Page Descriptions, Continued

Prescription Alert Details Page Descriptions (continued)

Field/Button	Description
Phone Number	The phone number of the pharmacy.
Fax Number	The fax number of the pharmacy.
Reported By	
Name	The name of the person reporting the prescription.
Position	The position of the person reporting the prescription.
Phone Number	The phone number for the person reporting the prescription.
Fax Number	The fax number for the person reporting the prescription.
Caller Detail	
Name	The name of the caller for the prescription.
Position	The position of the caller for the prescription.
Patient Detail	
Name	The name of the patient on the prescription.
Address (Care of)	The care of address of the patient.
Street	The street address of the patient.
City	The city of the patient.
State	The state of the patient.
Zip	The zip code of the patient.
Phone Number	The phone number of the patient.
DOB	The date of birth of the patient.
Practitioner Detail	
Name	The name of the practitioner on the prescription.
DEA #	The DEA number of the practitioner.
Address (Care of)	The care of address of the practitioner.
Street	The street address of the practitioner.
City	The city of the practitioner.
State	The state of the practitioner.

Continued on next page

Prescription Alert Details Page Descriptions, Continued

Prescription Alert Details Page Descriptions (continued)

Field/Button	Description
Zip	The zip code of the practitioner.
Phone Number	The phone number of the practitioner.
Suspected Activity	
Alterations	This box is checked if altered prescriptions are suspected.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	This box is checked if prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	This box is checked if prescription drugs were dispensed and the blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	This box is checked if the prescription was forged.
Drugs Involved	
Drug	The drug that was prescribed.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Date Filled	The date the drug was dispensed by the pharmacy.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to Initiator, but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator's telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

Submitting Person Alerts

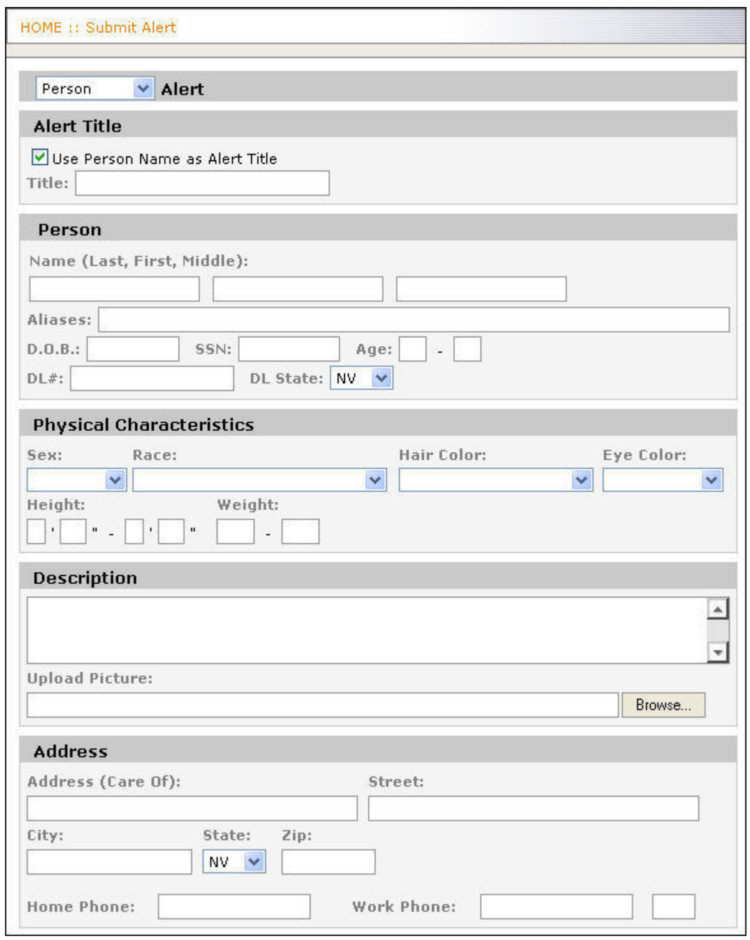
Introduction

The Submit Alerts option provides the ability to enter alerts for the Administrator to distribute to other users of the system, perhaps within pre-defined regions.

Procedure

Follow the steps in the table below to submit a person alert.

Step	Action
1	From the main menu, click **+Alerts**.
2	Click **Submit**. **Result**: The Submit Alerts page appears.

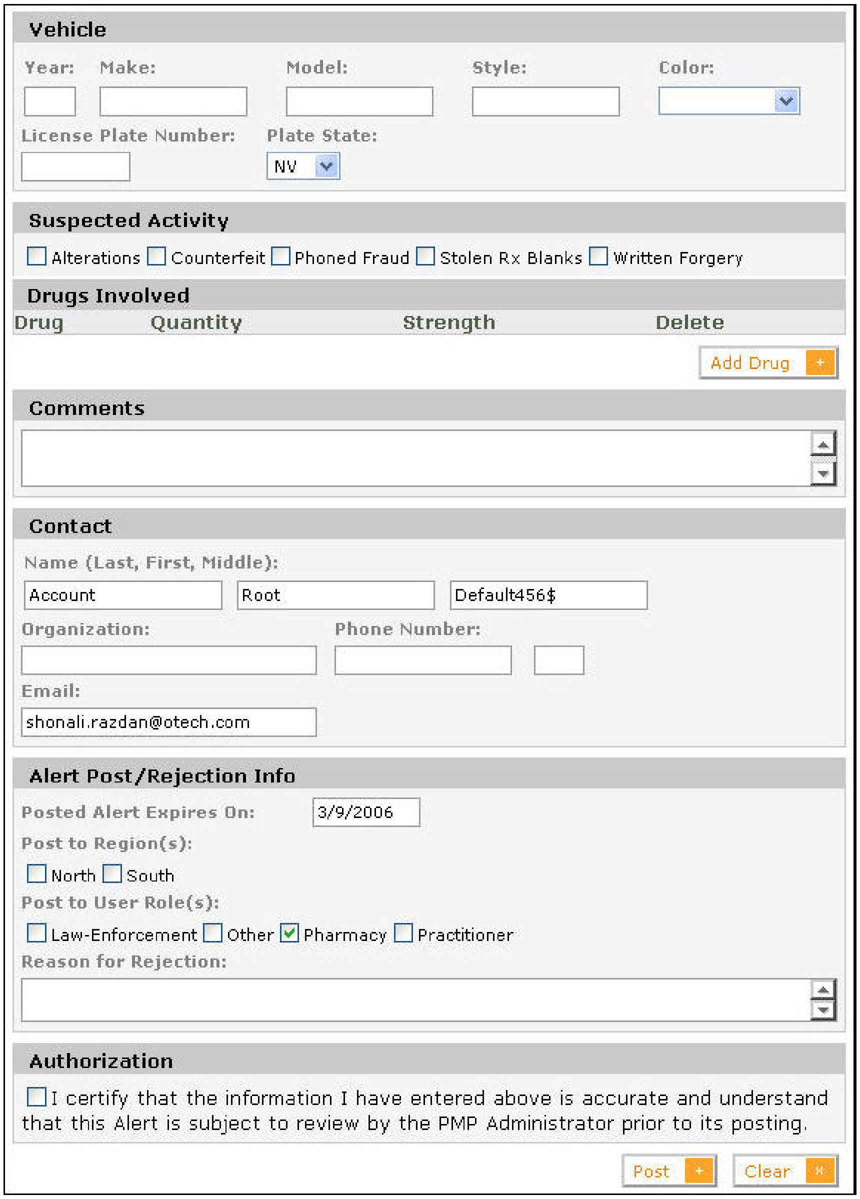


Continued on next page

Submitting Person Alerts, Continued

Procedure (continued)

Step	Action
3	Image continued



Step	Action
4	From the **Alert** drop-down menu click **Person**.

Continued on next page

Submitting Person Alerts, Continued

Procedure (continued)

Step	Action
5	Click **Person Name as Alert Title**. **Note**: If you wish to enter a different title, click the box. You can then enter a different Alert Title.
6	Enter the Person Name and Physical Description information. Do not add an image at this time – complete all keyed input first.
7	Click **Add Drug** to list the drugs that the person is suspected of obtaining illegally. **Note**: If you need to add another drug, click the button again.
8	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
9	If you have access to a picture of the person, click the **Browse** button above, next to the Description, and select the appropriate picture file.
10	The Contact data is defaulted to your information, taken from the My Account form. This can be changed if necessary.
11	Click **Submit** to send the Alert to the Administrator for approval and distribution.
12	Click **Clear** to remove all data and start over.

Submit Alerts for Person Page Descriptions

Submit Alerts for Person Page Descriptions

Field/Button	Description
Alert Title	
Use Person Name as Alert Title	This box is checked by default and triggers using the person name as the title of the alert to be displayed in the Posted Alerts list. Only clear the box if you want to enter a different title.
Title	Enter a new title for the alert if you cleared the Use Person Name as Alert title box. **Note**: The title only appears at the top of the Alert page – it is not used in any of the Alert Data Grids. However, this space can be used to highlight information such as "Wanted", "Armed and Dangerous", "Reward", or other notification that should not be buried in the text of the alert.
Person Detail	
Name	The name of the person who received the prescriptions or the name of the practitioner who issued the prescriptions.
Aliases	Any known aliases the person uses.
SSN	The Social Security Number of the person.
DL#	The person's driver's license number.
Age	The person's age or possible age range.
Date of Birth	The person's birth date.
Description	
Sex	The person's gender.
Race	The person's race.
Hair Color	The hair color of the person.
Eye Color	The eye color of the person.
Height Range	The actual height (recorded in the first space) or potential height range of the person.
Weight Range	The actual weight (recorded in the first space) or potential weight range of the person.

Continued on next page

Submit Alerts for Person Page Descriptions, Continued

Submit Alerts for Person Page Descriptions (continued)

Field/Button	Description
Physical Description	A physical description of the person, excluding the factors outlined above.
Photograph or Other Image	A photograph or sketch of the person (scanned or electronically generated) may be attached to the alert to provide a picture to aid recognition. Click the **Browse** button to search for a picture file. **Note**: This step should be completed only after you have entered all other data in the alert.
Address Information	
Address (Care of)	The street address or name of the person who receives mail for the person.
Street	The second line of the street address, if needed.
City	The city where the person resides.
State	The state where the person resides.
Zip	The zip code for the person address.
Home Phone	The person's home phone number.
Work Phone	The person's work phone number.
Vehicle	
Year	The vehicle year of manufacture.
Make	The vehicle make.
Model	The vehicle model.
Style	The vehicle style.
Color	The color of the vehicle.
License Plate Number	The plate number seen on the vehicle.
Plate State	The state displayed on the license plate.

Continued on next page

Submit Alerts for Person Page Descriptions, Continued

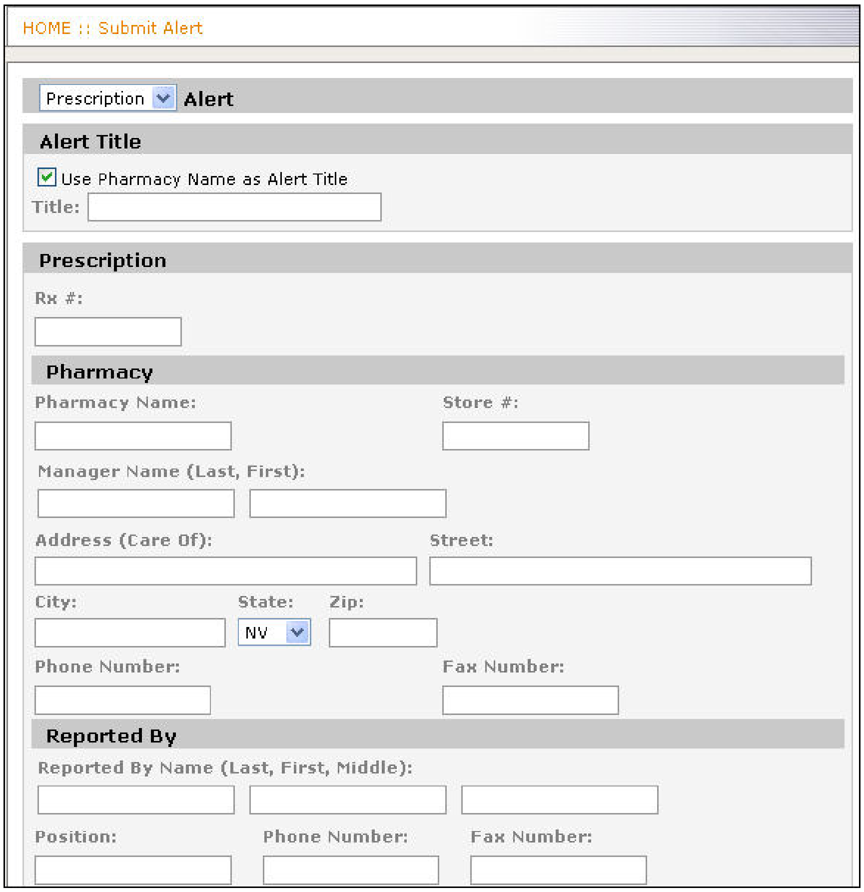
Submit Alerts for Person Page Descriptions (continued)

Field/Button	Description
Suspected Activity	
Alterations	Check if you know or suspect altered prescriptions were used.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	Select if you know or suspect prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	Check if you know or suspect blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	Select if you know or suspect prescriptions had been forged.
Drugs Involved	
Drug	The suspected prescription drug being abused.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug being abused, if known.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to initiator, but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator's telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

Submitting Prescription Alerts

Procedure

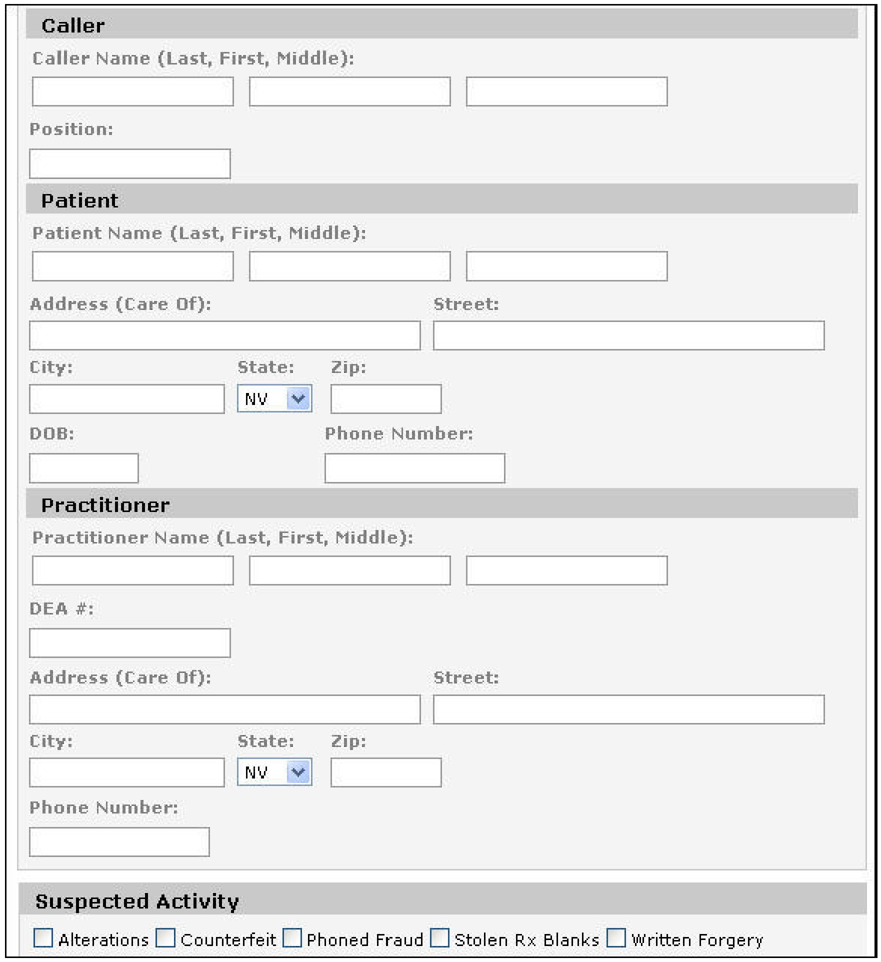
Follow the steps in the table below to submit prescription alerts.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click +Alerts.</td></tr>
<tr><td>2</td><td>Click Submit.</td></tr>
<tr><td>3</td><td>From the Alert drop-down menu, click Prescription.
Result: The Submit Alert page appears.

</td></tr>
</table>

Continued on next page

Submitting Prescription Alerts, Continued

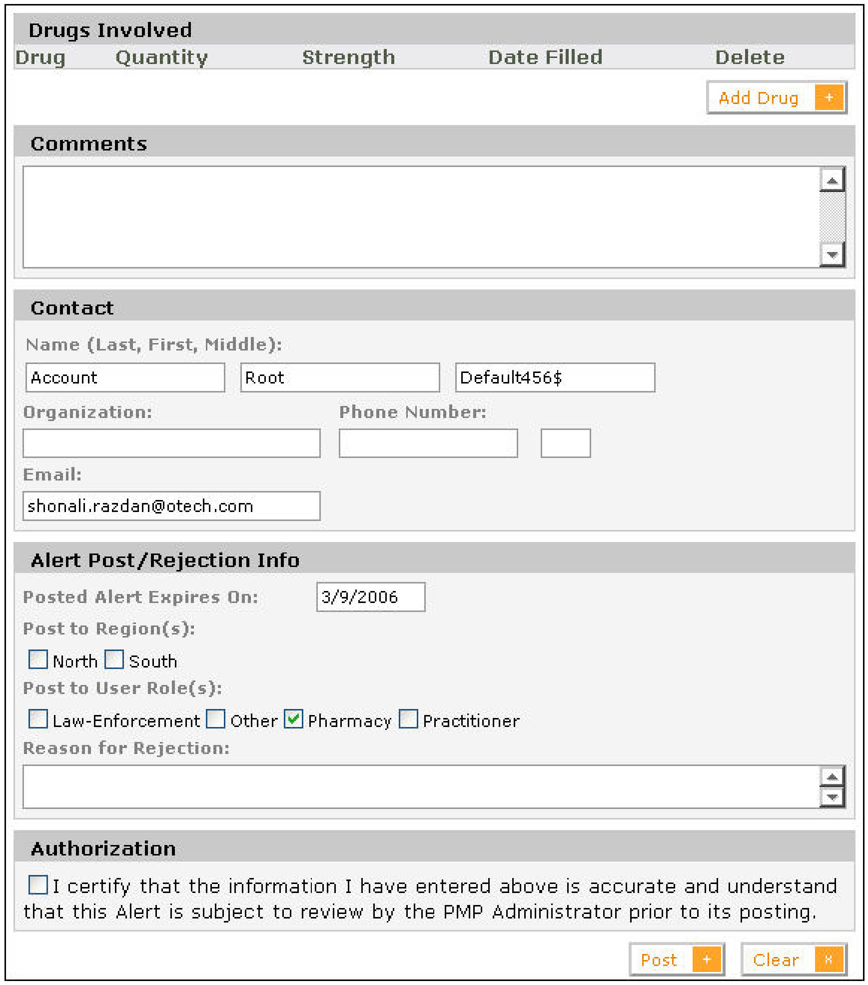
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Image continued

</td></tr>
</table>

Continued on next page

Submitting Prescription Alerts, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Image continued

</td></tr>
<tr><td>6</td><td>Click Pharmacy Name as Alert Title.
Note: If you wish to enter a different title, click the box. You can then enter a different Alert Title.</td></tr>
<tr><td>7</td><td>Enter all the information available for the alert.</td></tr>
<tr><td>8</td><td>Click Add Drug to list the drugs on the prescription.
Note: If you need to add another drug, click the button again.</td></tr>
</table>

Continued on next page

Submitting Prescription Alerts, Continued

Procedure
(continued)

Step	Action
9	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
10	The Contact data is defaulted to your information, taken from the My Account form. This can be changed if necessary.
11	Click **Submit** to send the Alert to the Administrator for approval and distribution.
12	Click **Clear** to remove all data and start over.

Submitting Alerts for Prescription Page Descriptions

Submitting Alerts for Prescription Page Descriptions

Field/Button	Description
Alert Title	
Use Pharmacy Name as Alert Title	This box is checked by default and triggers using the pharmacy name as the title of the alert to be displayed in the Posted Alerts list. Only clear the box if you want to enter a different title.
Title	Enter a new title for the alert if you cleared the Use Pharmacy Name as Alert Title box. **Note**: The title only appears at the top of the Alert page – it is not used in any of the Alert Data Grids.
Prescription Detail	
Rx #	The prescription number on the prescription.
Pharmacy Detail	
Pharmacy Name	The name of the pharmacy.
Store #	The store number of the pharmacy.
Manager Name	The name of the pharmacy's manager.
Address (Care of)	The care of address of the pharmacy.
Street	The street address of the pharmacy.
City	The city of the pharmacy.
State	The state of the pharmacy.
Zip	The zip code of the pharmacy.
Phone Number	The phone number of the pharmacy.
Fax Number	The fax number of the pharmacy.
Reported By	
Name	The name of the person reporting the prescription.
Position	The position of the person reporting the prescription.
Phone Number	The phone number for the person reporting the prescription.
Fax Number	The fax number for the person reporting the prescription.

Continued on next page

Submitting Alerts for Prescription Page Descriptions, Continued

Submitting Alerts for Prescription Page Descriptions (continued)

Field/Button	Description
Caller Detail	
Name	The name of the caller for the prescription.
Position	The position of the caller for the prescription.
Patient Detail	
Name	The name of the patient on the prescription.
Address (Care of)	The care of address of the patient.
Street	The street address of the patient.
City	The city of the patient.
State	The state of the patient.
Zip	The zip code of the patient.
Phone Number	The phone number of the patient.
DOB	The date of birth of the patient.
Practitioner Detail	
Name	The name of the practitioner on the prescription.
DEA #	The DEA number of the practitioner.
Address (Care of)	The care of address of the practitioner.
Street	The street address of the practitioner.
City	The city of the practitioner.
State	The state of the practitioner.
Zip	The zip code of the practitioner.
Phone Number	The phone number of the practitioner.

Continued on next page

Submitting Alerts for Prescription Page Descriptions, Continued

Submitting Alerts for Prescription Page Descriptions (continued)

Field/Button	Description
Suspected Activity	
Alterations	Check if you know or suspect altered prescriptions were used.
Counterfeit	This box is checked if the prescriptions are counterfeit.
Phoned Fraud	Select if you know or suspect prescriptions were fraudulently called in to the pharmacy.
Stolen Rx Blanks	Check if you know or suspect blank prescriptions had been stolen from a practicing practitioner.
Written Forgery	Select if you know or suspect prescriptions had been forged.
Drugs Involved	
Drug	The drug that was prescribed.
Quantity	The dosage quantity of the drug.
Strength	The strength of the drug.
Date Filled	The date the drug was dispensed by the pharmacy.
Comments	
Comment Text	Enter any comments associated with this alert.
Contact (defaults to Initiator but can be changed)	
Name	The name of the person initiating the alert in Last, First, Middle order.
Organization	The organization with which the initiator is affiliated.
Phone Number	The initiator’s telephone number and extension, if applicable.
Authorization	
Authorization Check Box	Check the **Authorization** box at the end of the form. **Note**: The Alert is not submitted without authorization.
Submit button	Click **Submit** to enter the alert for approval and distribution.
Clear button	Click **Clear** to delete all input and begin again.

Searching Alerts

Introduction

The Search Alerts option provides the ability to search the database for any subset of the alerts you are authorized to access. You can search either through person alerts or through prescription alerts by specifying so in the drop-down menu.

Procedure

Follow the steps in the table below to search alerts.

Step	Action
1	From the main menu, click **+Alerts**.
2	Click **Search**. **Result**: The Search Alerts page appears.
3	From the **Alert** drop-down menu select the type of alerts you want to search through.
4	Enter as much information as you can to identify the alert being searched. **Note**: The criteria are linked by a virtual “and”, so every item selected must be satisfied to return an alert in the search results.
5	From the **Search Reason** drop-down menu at the end of the form, select the appropriate reason. **Note**: This field is required.
6	Click **Search** to begin the search. Search results are displayed in a new form.
7	To view the alert details, highlight and click a row in the Search Results grid. **Result**: The original Alert detail is shown, even if expired.
8	Click **Search Alerts** again and the previous Search screen appears, with your original search criteria.
9	Click **Clear** to remove all data and start over.

Chapter 4: Messages Function

Overview

Introduction

The Messages function allows users to view notification messages.

The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful.

When you experience access issues, general problems, or have questions regarding the portal, you can create issue messages and post them to Messages for an administrator to view and reply.

The Messages function does not allow you to send issue messages to other users.

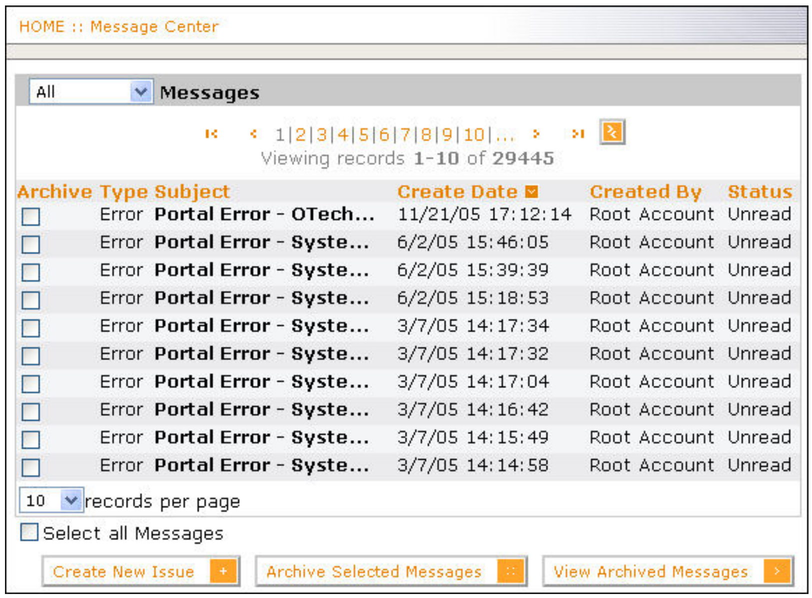
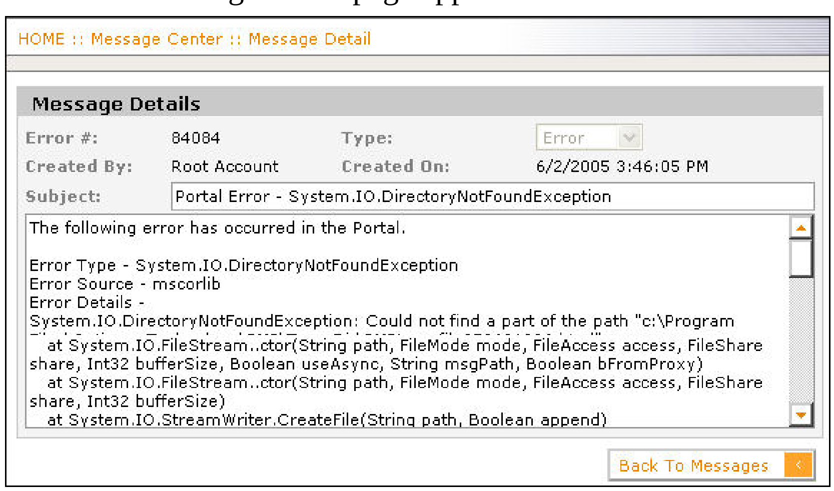
Contents

This chapter contains the following topics:

Viewing Messages

Procedure

Follow the steps in the table below to view messages.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
<tr><td>2</td><td>Highlight and click the row containing the message you want to view.
Result: The Message Detail page appears.

</td></tr>
</table>

Message Center Page Descriptions

Message Center Page Descriptions

Field/Button	Description
Archive	Check this box to select messages to be archived. See Archiving Messages on page 82 of this document.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. Only an administrator receives error messages. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When you experience access issues, general problems, or have questions regarding the portal, you can create issue messages and post them to Messages for an administrator's view and response. When an issue is resolved, either you or the administrator has authorization to close the issue. The 'Messages' function does not allow you to send issue messages to other users.
Subject	Provides a title or brief description of the notification or issue.
Created Date	The day and time when the system generated an issue message.
Created By	The user account that generated the message.
Status	The status of a message. There are three status types: read, unread, and updated. • **Read**: Indicates that you have read a message. • **Unread**: Indicates that you have not read a message. • **Updated**: Indicates that an administrator has read and updated an issue message that you posted.

Continued on next page

Message Center Page Descriptions, Continued

Message Center Page Descriptions (continued)

Field/Button	Description
Create New Issue button	Allows you to create an issue for an administrator to solve. There are three issue types: access, problem, and question. • **Access**: Indicates that you are experiencing security profile or login issues. • **Problem**: Indicates that you are experiencing general problems within the portal. • **Question**: Indicates that you have a general question.
Archive Selected Messages button	Archives the selected messages. **Note**: Archived messages are read-only and cannot be restored. Verify your message selection before clicking the **Archive Selected Messages** button.
View Archived Messages button	Allows you to view archived messages. **Note**: Archived messages are read-only and cannot be restored.

Creating an Issue

Introduction

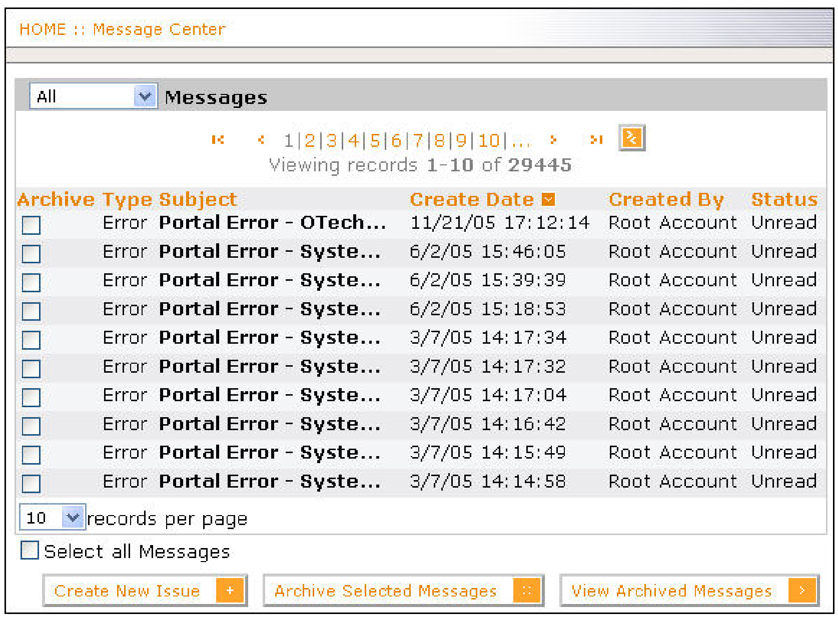
If you experience access issues, general problems, or have questions regarding the portal, then you can create issue messages and post them for an administrator to view and respond.

Procedure

Follow the steps in the table below to create an issue.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>
From the main menu, click **Messages**.

Result: The Message Center page appears.

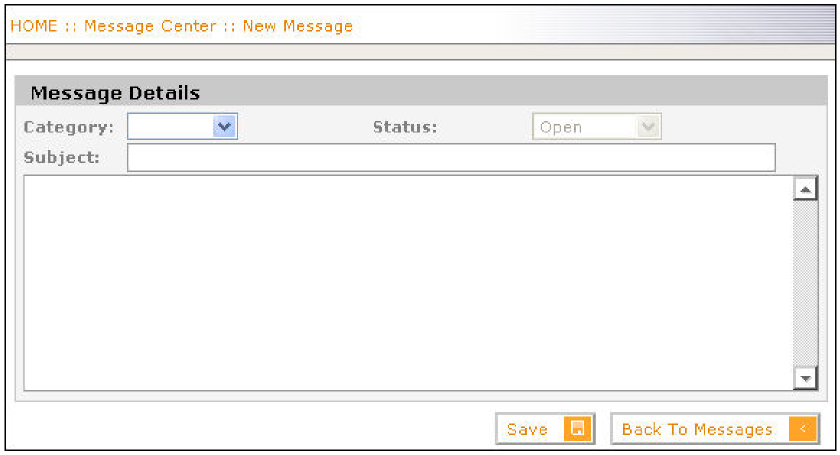


</td></tr>
</table>

Continued on next page

Creating an Issue, Continued

Procedure (continued)

Step	Action
2	Click **Create New Issue**. **Result**: The New Message page appears. 
3	From the **Category** drop-down menu, select a category that best describes your issue.
4	Type a subject into the **Subject** field.
5	Type an issue message into the text box.
6	Click **Save** to submit your issue message.
7	Click **Back to Messages** to cancel changes and go back to the Message Center page.

New Message Page Descriptions

New Message Page Descriptions

Field/Button	Description
Category	Allows you to select a category that best describes your issue. There are three issue types: access, problem, and question. • **Access**: Indicates that you are experiencing security profile or login issues. • **Problem**: Indicates that you are experiencing general problems within the portal. • **Question**: Indicates that you have a general question.
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the administrator. • **Open**: Indicates that you opened an issue message and it requires an administrator's response. • **Responded**: Indicates that you responded to an administrator's comments and that the issue message requires follow-up remarks or closure. **Note**: When you create an issue message, Status defaults to "Open" and cannot be changed.
Subject	Provide a title or brief description of the issue.
Save button	Sends your issue message to the administrator.
Back to Messages button	Cancels all changes and sends you back to the Messages list.

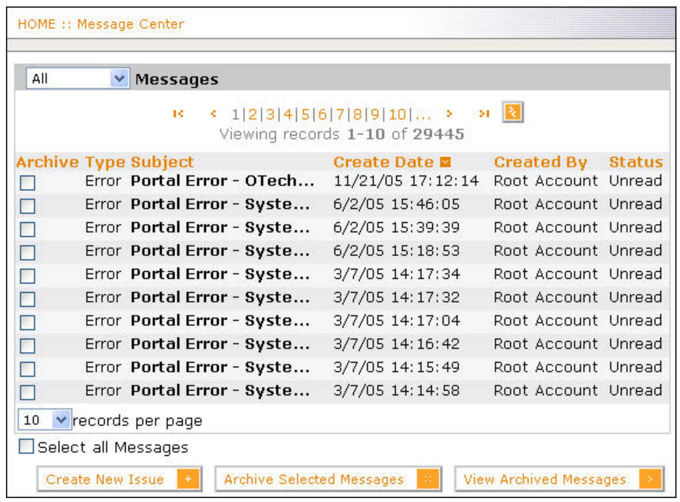
Responding to an Issue

Introduction

If the system administrator has assigned you a security profile that has access to responding to issues, you will be able to see issues raised by other users and respond to the same.

Procedure

Follow the steps in the table below to respond to an issue.

Step	Action
1	From the main menu, click **Messages**. **Result**: The Message Center page appears. 
2	Click the issue that you want to answer. **Result**: The Message Detail page appears.
3	From the **Responses** text box, type your response to the user's message. **Note**: The **Responses** text box is the only text box used in this correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your reply. For example, type "Admin:" before each response that you provide.
4	If your response solves the user's issue and you want to close the issue, click **Closed** from the **Status** drop-down menu.
5	Click **Save** to submit your response.
6	Click **Back to Messages** to cancel changes.

Message Detail Page Description

Message Detail Page Description

Field/Button	Description
Message Details	
Issue #	Unique identifier, which distinguishes an issue message from all others within the system.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When users experience access issues, general problems, or have questions regarding the portal, they can create issue messages and post them to the Message Center for you to view and reply. When an issue is resolved, either you or the user has authorization to close the issue. The Message Center does not allow users to send issue messages to other users.
Created By	Indicates the user that generated the issue message.
Created On	Indicates the date and time the user created the issue message.
Category	Allows a user to select a category that best describes the issue. There are three issue types: access, problem, and question. • **Access**: Indicates that the user is experiencing security profile or login issues. • **Problem**: Indicates that the user is experiencing general problems within the portal. • **Question**: Indicates that the user has a general question.

Continued on next page

Message Detail Page Description, Continued

Message Detail Page Description (continued)

Field/Button	Description
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the user. • **Open**: Indicates that a user opened an issue message and it requires your response. • **Responded**: Indicates that a user responded to the issue message and it requires follow-up remarks or closure.
Subject	Provides a title or brief description of the issue.
Responses	
Response Text Box	Provides a text box, which allows you and the user to correspond. **Note**: The **Responses** text box is the only text box used during a correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your response. For example, type "Admin:" before each response that you provide.
Save button	Sends your response to the user.

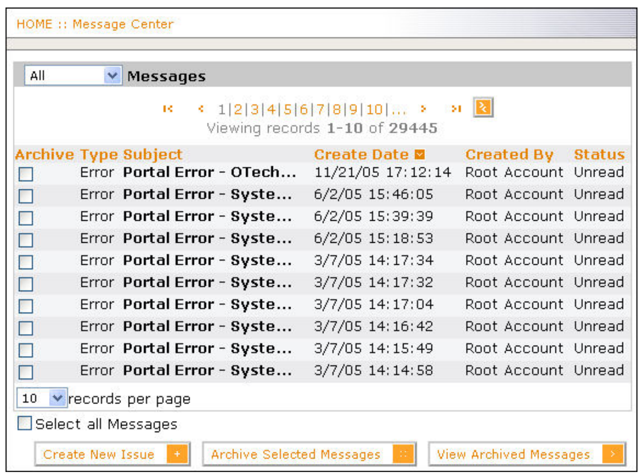
Responding to an Answer

Introduction

If you posted a message and the administrator's response did not solve the issue, then you can respond to their answer with follow-up questions or comments.

Procedure

Follow the steps in the table below to respond to an answer.

Step	Action
1	From the main menu, click **Messages**. **Result**: The Message Center page appears. 
2	Click the message that you want to respond to. **Result**: The Message Detail page appears.
3	In the **Responses** text box, type your response below the administrator's message. **Note**: The **Responses** text box is the only text box used during a correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your response. For example, type "User:" before each response that you provide. See example on the following page.
4	If the administrator's response solves your issue, click **Closed** from the **Status** drop-down menu to close the issue.
5	Click **Save** to submit your response.
6	Click **Back to Messages** to cancel changes.

Message Detail Page Description

Message Detail Page Description

Field/Button	Description
Message Details	
Issue #	Unique identifier, which distinguishes an issue message from all others within the system.
Type	Displays the message type. There are three message types: error, notification, and issue. • **Error**: The system posts error messages when errors occur within the portal. • **Notification**: The system posts notification messages after you perform specific actions within the portal. For example, if you upload a file into the system, the system notifies you that your file upload was either successful or unsuccessful. • **Issue**: When users experience access issues, general problems, or have questions regarding the portal, they can create issue messages and post them to the Message Center for you to view and reply. When an issue is resolved, either you or the user has authorization to close the issue. The Message Center does not allow users to send issue messages to other users.
Created By	Indicates the user that generated the issue message.
Created On	Indicates the date and time the user created the issue message.
Category	Allows a user to select a category that best describes the issue. There are three issue types: access, problem, and question. • **Access**: Indicates that the user is experiencing security profile or login issues. • **Problem**: Indicates that the user is experiencing general problems within the portal. • **Question**: Indicates that the user has a general question.

Continued on next page

Message Detail Page Description, Continued

Message Detail Page Description (continued)

Field/Button	Description
Status	Displays the status of an issue message. There are three status types: closed, open, and responded. • **Closed**: Indicates that an issue message was resolved and closed by either you or the user. • **Open**: Indicates that a user opened an issue message and it requires your response. • **Responded**: Indicates that a user responded to the issue message and it requires follow-up remarks or closure.
Subject	Provides a title or brief description of the issue.
Responses	
Response Text Box	Provides a text box, which allows you and the user to correspond. **Note**: The **Responses** text box is the only text box used during a correspondence. To track each response, organize the **Responses** text box by typing your name or job title before your response. For example, type "Admin:" before each response that you provide.
Save button	Sends your response to the user.
Back to Messages	Cancel changes and return to the Messages screen.

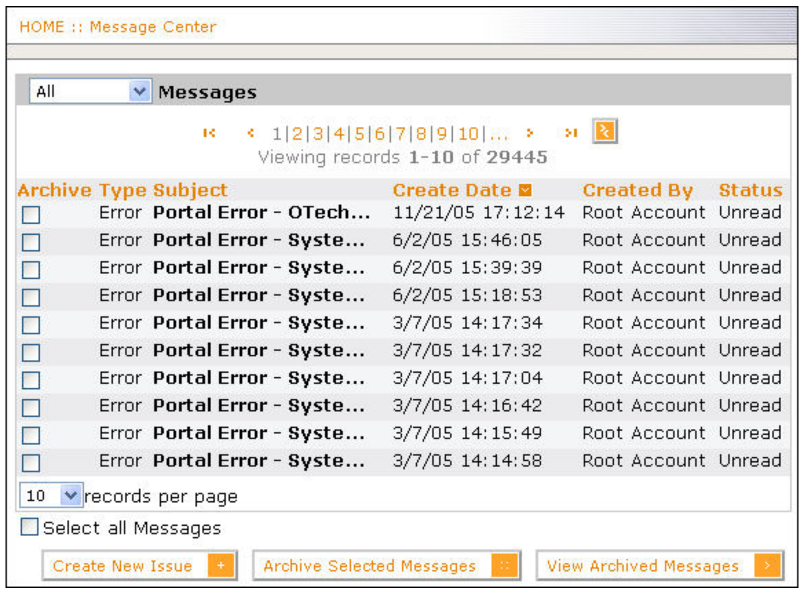
Archiving Messages

Introduction

The Messages function allows you to archive selected messages.

Procedure

Follow the steps in the table below to archive messages.

Step	Action
1	From the main menu, click **Messages**. **Result**: The Message Center page appears. 
2	Click the check boxes next to the messages that you want to archive. **Note**: Archived messages are read-only and cannot be restored or edited.
3	Verify your message selection.
4	Click **Archive Selected Messages**. A message is appears verifying that the messages have been archived. 

Viewing Archived Messages

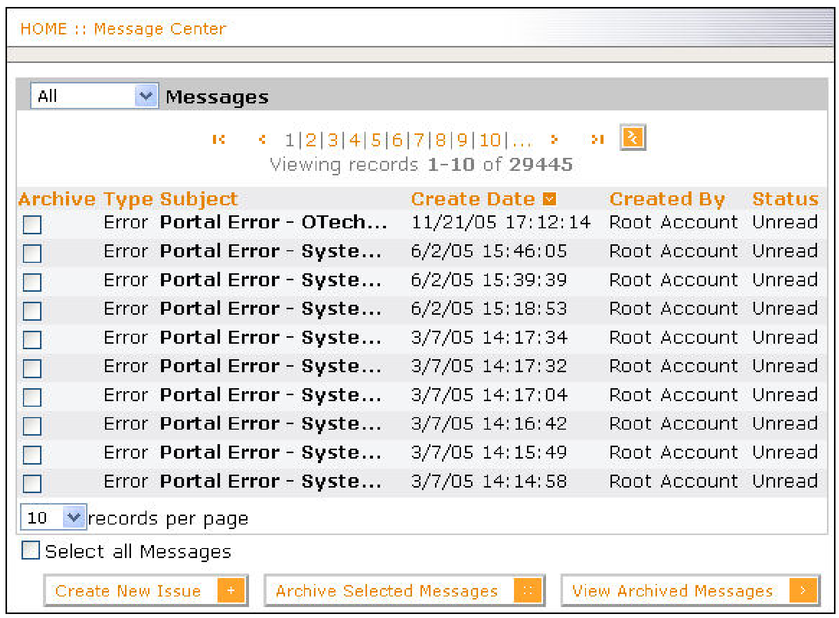
Introduction

The Messages function allows you to view archived messages.

Note: Archived messages are read-only and cannot be restored or edited.

Procedure

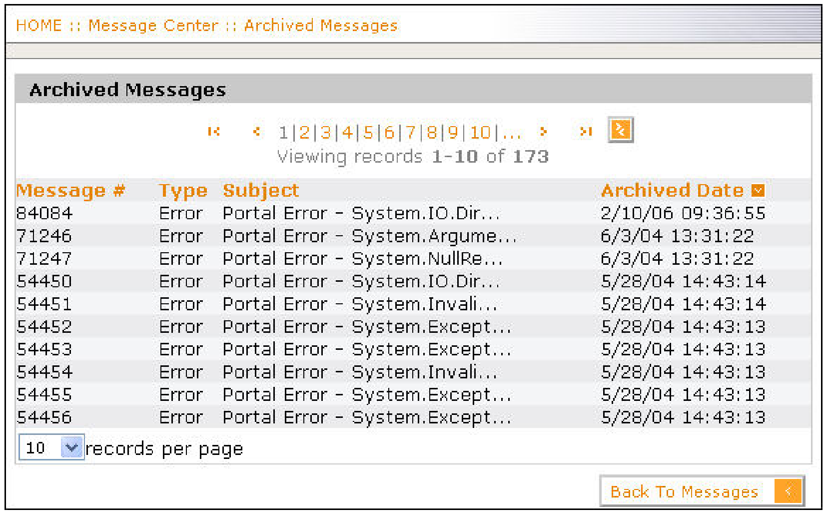
Follow the steps in the table below to view archived messages.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click Messages.
Result: The Message Center page appears.

</td></tr>
</table>

Continued on next page

Viewing Archived Messages, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click View Archived Messages.
Result: The Archived Messages page appears.

</td></tr>
<tr><td>3</td><td>From the Subject column, click the name of the archived message that you want to view.
Result: The Message Details page appears.</td></tr>
<tr><td>4</td><td>When you have finished reading the message, click Back to Archived Messages to be returned to the Archived Messages list.</td></tr>
<tr><td>5</td><td>Click Back to Messages to be returned to the Message Center page.</td></tr>
</table>

Archived Messages Page Descriptions

Archived Messages Page Description

Field/Button	Description
Message #	Unique identifier, which distinguishes a message from all others within in the system.
Type	Displays the type of message that you archived.
Subject	Provides a title or brief description of the error, notification, or issue.
Archived Date	The date when you archived a message.
Back to Archived Messages button	Returns you to the Archived Messages page.
Back to Messages button	Returns you to the Messages page.

Chapter 5: My Account

Overview

Introduction

The My Account section allows you to change user account information, such as contact information and password.

Contents

This chapter contains the following topics:

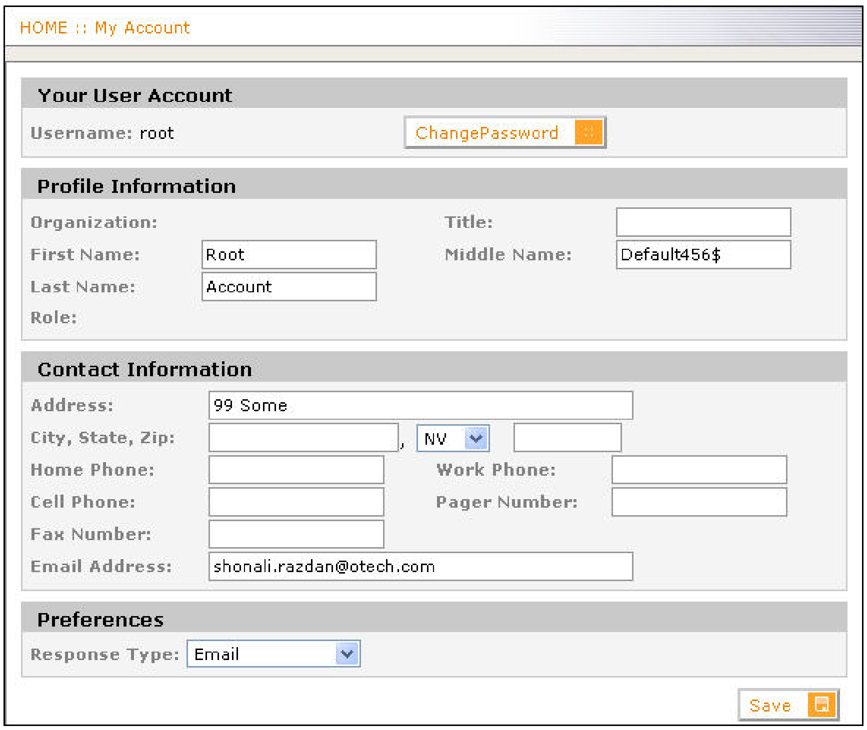
Viewing or Changing Account Information

Introduction

The My Account section allows you to view or change your account information, such as your password, your title, your address and telephone numbers, as well as your preference for receiving messages from the Web Center.

Procedure

Follow the steps in the table below to view or change account information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click My Account.
Result: The My Account page appears.

</td></tr>
<tr><td>2</td><td>To change your password, click Change Password and follow the Changing the Password procedure on page 92.</td></tr>
<tr><td>3</td><td>To change your account information, edit the information in the appropriate fields.</td></tr>
<tr><td>4</td><td>Click Save to save the changes.</td></tr>
</table>

Continued on next page

Viewing or Changing Account Information, Continued

Email Notification of Account Changes

The PMP system automatically notifies you by email if any information has been changed on your My Account page.

- If your email address has been changed an email notification is sent to both the old and the new email address informing you of the change.
- If any other information has been changed an email notification is sent to your email address notifying you that a change has been made.

If you feel that the information that was changed is incorrect, you need to contact your administrator immediately.

My Account Page Descriptions

My Account Page Descriptions

Field/Button	Description
Your User Account	
Username	The user name on the account. **Note**: This information is read-only and cannot be changed.
Change Password button	Changes the password on the account.
Profile Information	
Organization	The name of your organization. This information is read-only and cannot be changed except by the Administrator.
Title	Your job title.
Badge #	Your badge number. This information is read-only and cannot be changed except by the Administrator.
Unit #	The unit where you are assigned. This information is read-only and cannot be changed except by the Administrator.
First Name	Your first name.
Middle Name	Your middle name.
Last Name	Your last name.
Contact Information	
Address	The street address where you reside.
City, State, Zip	The city, state, and zip code where you reside.
Home Phone	Your home phone number.
Work Phone	Your work phone number.
Cell Phone	Your cell phone number.
Pager Number	Your pager number.
Fax Number	Your fax number.
Email Address	Your e-mail address.

Continued on next page

My Account Page Descriptions, Continued

My Account Page Descriptions (continued)

Field/Button	Description
Preferences	
Response Type	This sets the way you receive request data, alerts and messages. If you select: • **Email** messages to the e-mail address provided above. • **Fax** routes messages to the fax number listed above. • **Message Center** sends the notifications to the Messages function for later pick-up.
Save button	Saves the changes you made to the contact information.

Changing the Password

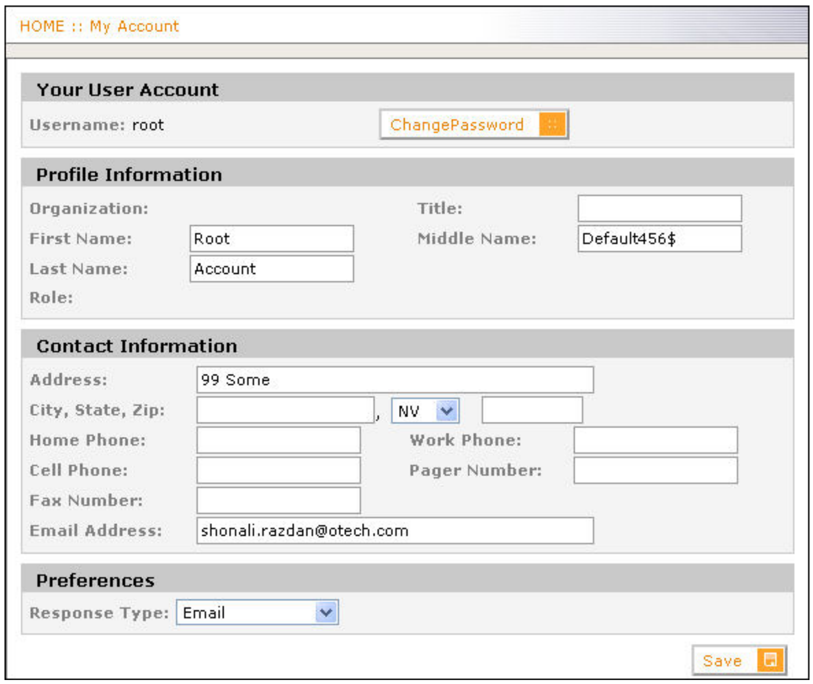
Introduction

The My Account section allows you to change your password. Most agencies require employees to change their passwords periodically. If you are required to change your password periodically, the system notifies you five days before the password expires.

Procedure

Follow the steps in the table below to change the password.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click My Account.
Result: The My Account page appears.



</td></tr>
<tr><td>2</td><td>Click Change Password to change your password.
Result: The Change Password page appears.</td></tr>
<tr><td>3</td><td>In the Current Password field, type your current password.</td></tr>
</table>

Continued on next page

Changing the Password, Continued

Procedure (continued)

Step	Action
4	In the **New Password** field, type your new password. Password requirements, must contain at least: • 8 characters in length • One uppercase alphabet letter • One lowercase character • One number character • One symbol character **Example**: Root$123
5	In the **Confirm Password** field, type your new password again.
6	Click **Change** to save your new password.
7	Click **Cancel** to delete all changes. Your password remains the same as it originally was.

Change Password Page Descriptions

Change Password Page Descriptions

Field/Button	Description
Current Password	The password that must be changed.
New Password	The new password that you want to use. Password requirements, must contain at least: • 8 characters in length • One uppercase alphabet letter • One lowercase character • One number character • One symbol character **Example**: Root$123
Confirm Password	Retype the password for your account. The information that you type in this field must match the information typed in the **New Password** field.
Change button	Saves the password changes.
Cancel button	Cancels any changes and returns you to the My Account page.

Chapter 6: Accessing the User Directory

Overview

Introduction

The User Directory section allows you to view another user's profile and contact information.

Contents

This chapter contains the following topics:

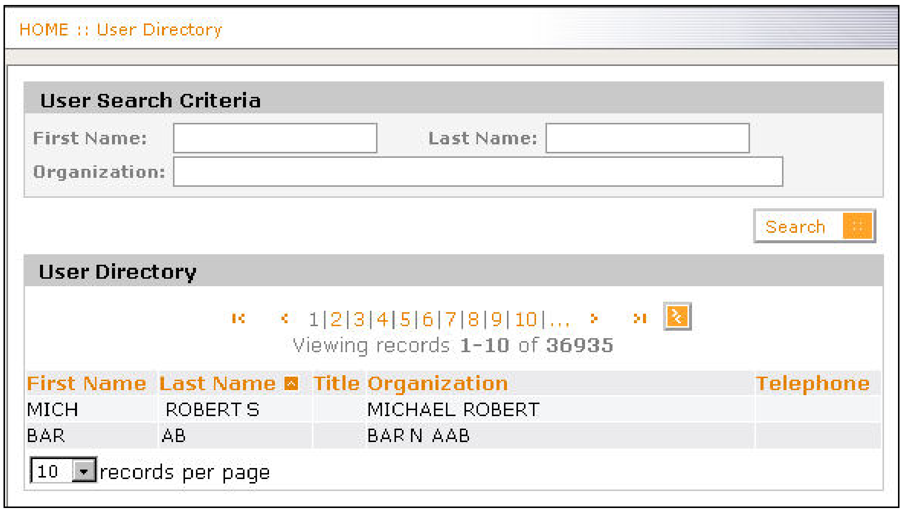
Viewing User Account Information

Introduction

The User Directory section allows you to view the contact information of other users.

Procedure

Follow the steps in the table below view user account information.

Step	Action
1	From the main menu, click **User Directory**. **Result**: The User Directory page appears. 

Continued on next page

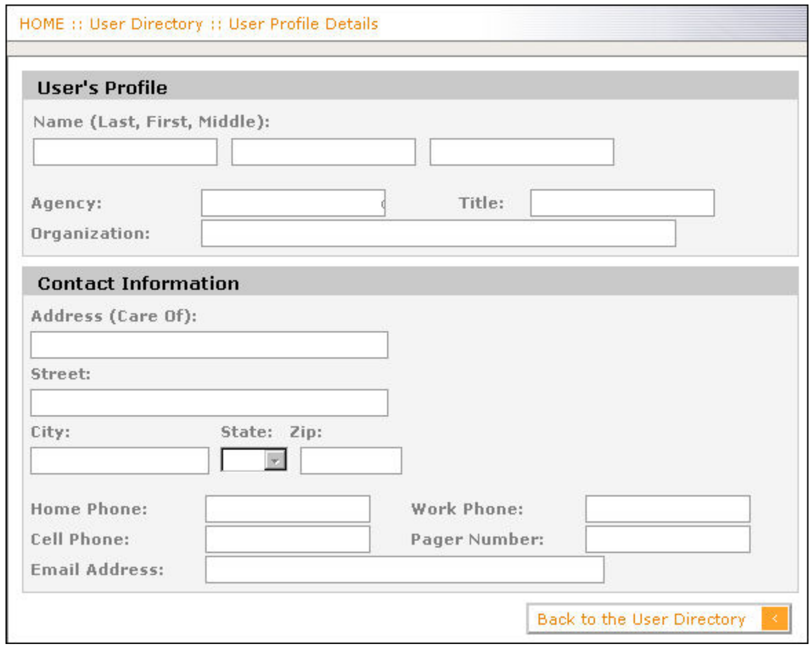
Viewing User Account Information, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

Click a user to view their profile and contact information.

Result: The User Profile Details page appears.



Note: A user's profile and contact information is read-only and cannot be edited by another user.

</td></tr>
<tr><td>3</td><td>Click Back to the User Directory to return to the User Directory page.</td></tr>
</table>

User Directory Page Descriptions

User Directory Page Descriptions

Field/Button	Description
First Name	The first name of each user in the directory.
Last Name	The last name of each user in the directory.
Title	The job title of each user in the directory.
Agency	The agencies to which each user belongs.
Telephone	The telephone numbers of the users in the directory.

User Directory Details Page Descriptions

User Directory Details Page Descriptions

Field/Button	Description
Name	The user’s name in Last, First Middle format.
Agency	The agency to which the user belongs.
Title	The job title of the user.
Address (Care of)	The first line of the street address or the “care of” name for the user where they receive mail.
Street	The second line of the street address, unless a “care of” name was used.
City	The city for the user address.
State	The state for the user address.
Zip	The zip code for the user.
Home Phone	The user’s home telephone number.
Work Phone	The user’s work telephone number.
Cell Phone	The user’s cell telephone number.
Pager Number	The user’s pager telephone number.
Email Address	The user’s e-mail address.
Back to the User Directory button	Click this button to be returned to the User Directory.

Content Management

Chapter 7: FAQs

Overview

Introduction

The FAQ section allows users to view the FAQs.

Contents

This chapter contains the following topics:

Viewing the FAQ Index

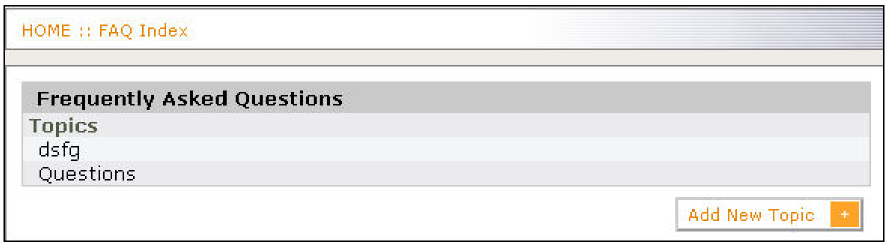
Introduction

The FAQ section allows users to view the FAQs.

Procedure

Follow the step in the table below to view a list of FAQs.

Step	Action
1	From the main menu, click **FAQ**. **Result**: The FAQ Index page appears.



FAQ Index Page Descriptions

FAQ Index Page Descriptions

Field/Button	Description
Topics	View the FAQs that were entered into the system.
Add New Topic button	Create a new FAQ topic.

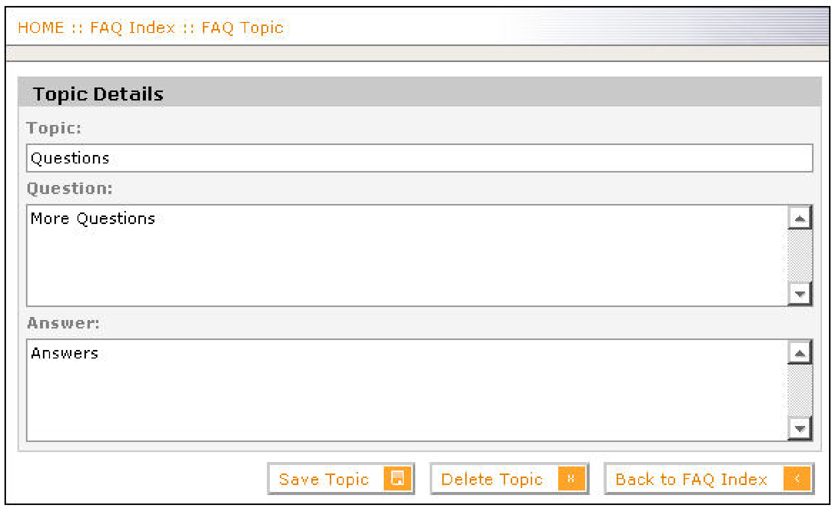
Viewing an FAQ Topic

Introduction

The FAQ section allows users to view an FAQ topic.

Procedure

Follow the steps in the table below to view and FAQ topic.

Step	Action
1	From the main menu, click **FAQ**.
2	From the FAQ Index page, click the name of the FAQ topic that you want to view. **Result**: The FAQ Topic page appears. 

FAQ Topic Page Descriptions

FAQ Topic Page Descriptions

Field/Button	Description
Topic	The subject of the question.
Question	The question.
Answer	The answer to the question.
Save Topic button	Save the modified FAQ topic.
Delete Topic button	Delete the FAQ topic.
Back to FAQ Index button	Returns you to the FAQ Index page.

Chapter 8: InfoCenter

Overview

Introduction

The InfoCenter section allows users to view the news and information that was posted to the Portal.

Contents

This chapter contains the following topics:

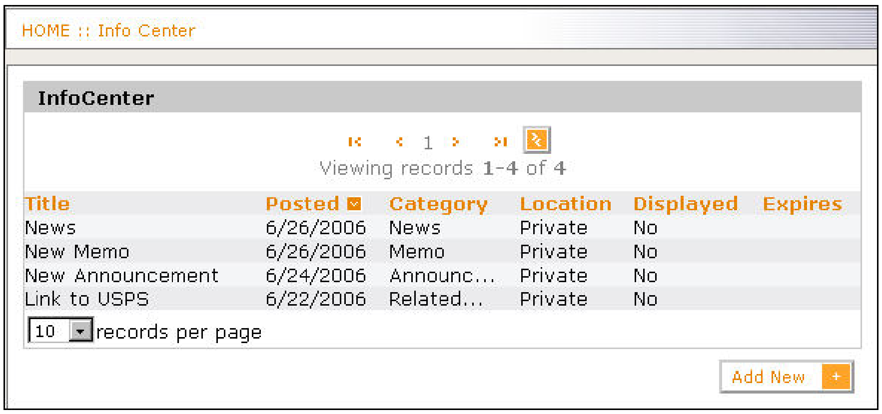
Viewing the InfoCenter

Introduction

The InfoCenter section allows users to view the news and information that was posted to the Portal.

Procedure

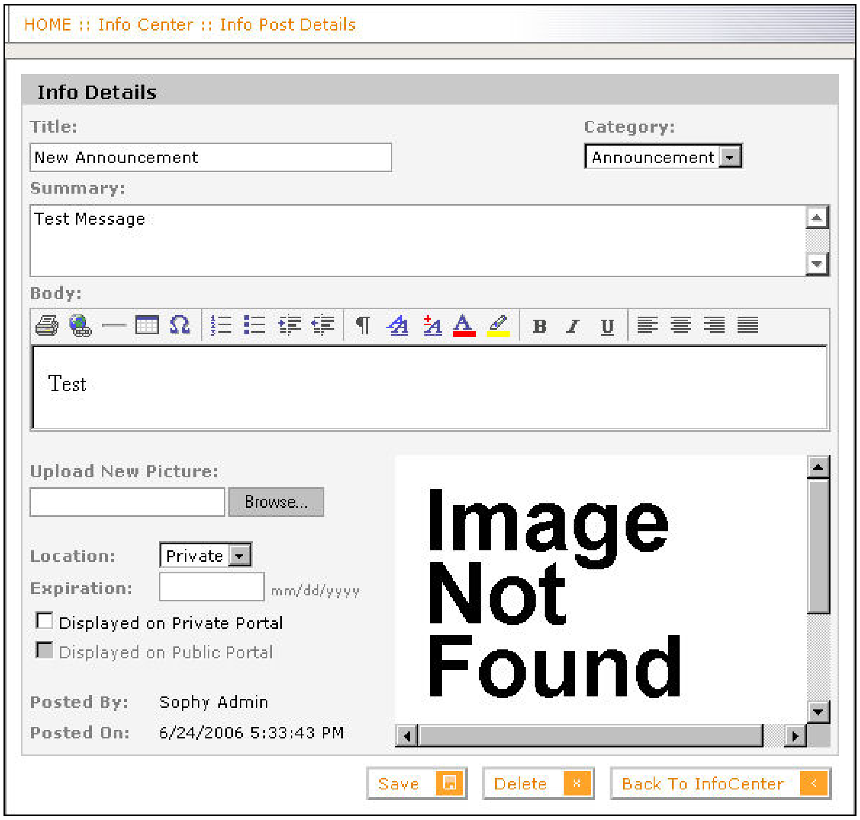
Follow the steps in the table below to view the InfoCenter.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the main menu, click InfoCenter.
Result: The InfoCenter page appears.

</td></tr>
</table>

Continued on next page

Viewing the InfoCenter, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>Click the item that you wish to view.
Result: The InfoCenter Details page appears.

</td></tr>
</table>

InfoCenter Page Descriptions

InfoCenter Page Descriptions

Field/Button	Description
Title	An identifying name given to a news post.
Posted	The date the information was posted to the Portal.
Category	Describes the type of information that is posted, such as News, Memo, Announcements, etc.
Location	Identifies where the information appears, which for the Web Center is always the Portal (Private).
Displayed	Indicates whether the news post is displayed on the Portal Home page.
Expires	The day the news post expires and is no longer displayed on the home page of the Portal.

Chapter 9: Related Links

Overview

Introduction

The Related Links functionality allows you to quickly access important external links.

Contents

This chapter contains the following topic:

Using a Related Link

Procedure

Follow the steps in the table below to use a related link.

Step	Action
1	From the main menu, click **Related Links**. **Result**: The Related Links page appears. 
2	Click on the link that you wish to view.

Upload Center

Chapter 10: Pharmacy File Upload

Overview

Introduction

The Pharmacy File Upload functions are available only if the Pharmacy Board has purchased the Pharmacy Upload module. This module allows pharmacies to upload their own prescription dispensing data and to view the processing results for the data files that were uploaded.

Contents

This chapter contains the following topics:

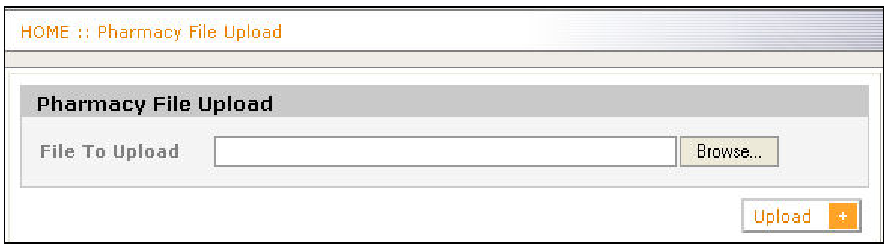
Uploading a Prescription Data File

Introduction

The File Upload section allows authorized pharmacy users to upload their own prescription data files.

Procedure

Follow the steps in the table below to upload a prescription data file.

Step	Action
1	From the main menu, click **Upload Center**.
2	Click **File Upload**. **Result**: The Pharmacy File Upload page appears. 
3	From the Pharmacy File Upload page, click **Browse** and select the file you want to upload.
4	Click **Upload** to upload the file to the system. **Result**: The system responds with a message to indicate whether the upload was successful or not and also gives you a generated logical name for the file you uploaded if the upload was successful.

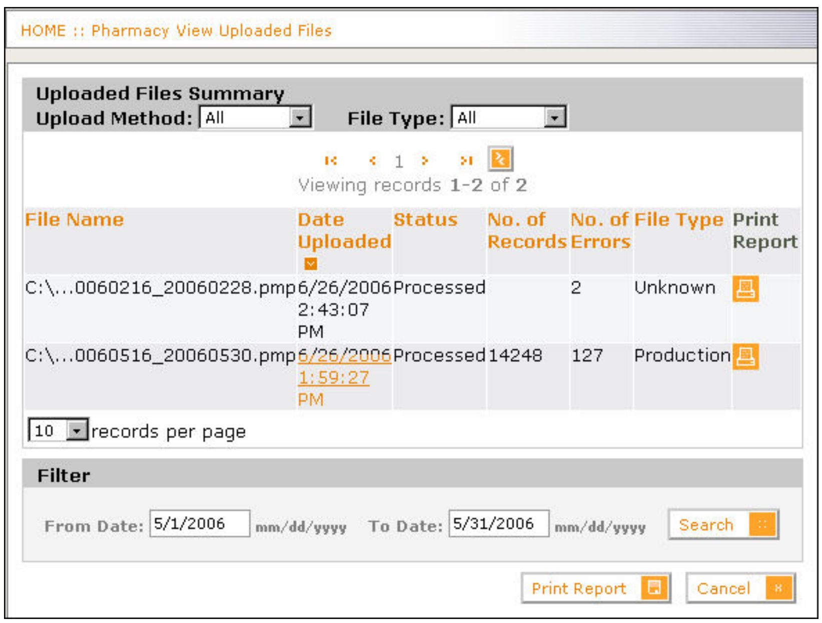
Viewing and Printing a Summary of Uploaded Prescription Data Files

Introduction

The View Uploaded Files section allows authorized pharmacy users to view the prescription data files that they have uploaded and print a summary report of the same.

Procedure

Follow the steps in the table below to view and print a summary of uploaded prescription data files.

Step	Action
1	From the main menu, click **Upload Center**.
2	Click **View Uploaded Files**. **Result**: The Pharmacy View Uploaded Files page appears.  **Note**: This page displays all files uploaded by you in reverse chronological order starting with the latest.
3	To view uploaded files within a specific period, enter the **From Date** and **To Date** for the period and click **Search** **Note**: To further define your search criteria, choose either/or the upload method or the file type from the corresponding drop-down menus.

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Viewing and Printing a Summary of Uploaded Prescription Data Files, Continued

Procedure (continued)

Step	Action
4	To print a summary report of all the uploaded files, click **Print Report**. **Result**: The system opens a new window and displays the report as a pdf file.
5	Click the Printer icon to print the report.
6	To print a summary report of all the uploaded files within a specific period, enter the **From Date** and **To Date** for the period and click the **Print Report** button. **Result**: The system opens a new window and displays the report as a pdf file.
7	Click the Printer icon to print the report.

Pharmacy View Uploaded Files Page Descriptions

Pharmacy View Uploaded Files Page Descriptions

Field/Button	Description
File Name	The external file name (when uploaded) for the prescription file.
Date Uploaded	The date the prescription data file was uploaded.
Status	The current status of the uploaded file – Processed, Awaiting Processing, etc.
No. of Records	The number of records processed from the file.
No. of Errors	The number of records that had errors in the file.
Print icon	Click on this icon to print a report of that file.
Filter Parameters	
From Date	Enter the from date to search for files uploaded within a specific period
To Date	Enter the to date to search for files uploaded within a specific period
Search button	Click this button to search for files uploaded within the period specified by the From and To date parameters.
Print Report button	Click this button to print a summary report of all files uploaded within a specific period.

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