Controlled Substance Ordering System (CSOS)

CardinalHealth
Essential to care™

Controlled Substance Ordering System, also known as CSOS, uses the latest technologies to provide you with an industry leading experience for ordering controlled substances (C2) through Order Express.

It does not require any software installation on your computer because it is built entirely online within Order Express, making your CSOS process more streamlined and efficient.

- Online **C2 Product Receiving** is done directly against the **E222**.
- Retention of the receiving data by Cardinal Health for a period of **five years**.
- Online **Signing Certificate Management** within Order Express adds ease to your ordering.

» Prerequisite overview

CardinalHealth™ Order Express   CSOS Orders   DEA Certificates   Notifications   Downloads [0]

Register Certificates
View Certificates

CSOS Orders

CSOS Orders
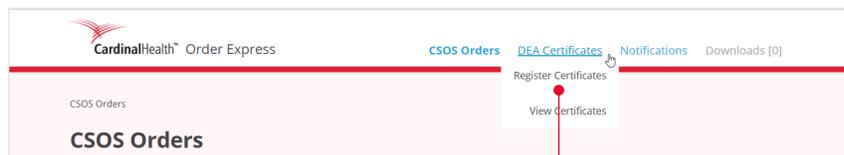
Register DEA Certificates

To use the CSOS functionality, you will need to register your DEA certificate.

Note: The Axway CSOS system has been certified by an independent third-party audit as required by 21 CFR 1311.55(d). The audit, the scope of which included a review of Signer Private Key Storage and Access, was conducted by the Drummond Group, and the Certificate of Compliance can be found on the Order Express Help page.

- Click the CSOS Administration link found within the Quick Links section of the Order Express homepage.
- Access the Register Certificates page via the DEA Certificates Header.

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» Prerequisite overview (continued)

Order Express   CSOS Orders   **DEA Certificates**   Notifications   Downloads [0]

DEA Certificates > Register Certificates

Register Certificates
Register DEA certificate.

* DEA #

* Certificate File
Upload your DEA Certificate in .pfx or .p12 file format.
Click here for upload instructions.

[Upload file]

* DEA Provided Sign-in Password
Enter the signing password provided by DEA with your Certificate. This is not your private key (PKI) information. For questions regarding your certificate password, please contact DEA Help Desk at 1-877-DEA-ECOM (1-877-332-3266).

Create CSOS Sign-in Password
If you prefer to create a CSOS Order Express signing password in lieu of using the DEA password, enter it here. Otherwise key in the DEA provided password.

Confirm CSOS Sign-in Password

[Register]

There are four steps in the certificate registration process:

1. Enter the DEA number associated with the CSOS ordering account. Cardinal Health CSOS will automatically link your Cardinal Health account number to the proper DEA number as you complete your registration. Please note, the following criteria must be successfully met:

   • The DEA number typed in must match a DEA number associated with a Cardinal Health account.

   • The DEA number must match the DEA number associated with the DEA-issued signing certificate (*.PFX file).

2. Locate your DEA-issued signing certificate so that it may be uploaded at the end of the enrollment process. Instructions on how to upload are available via the Click here link.

3. Enter the password that you currently use with your DEA-issued signing certificate (*.PFX file). This is the only time Cardinal Health will ask you for this password. This particular password will be used automatically by Cardinal Health to validate the signing certificate with the DEA when placing an electronic C2 order.

4. Create and confirm your password that is used to sign your C2 orders. This will be the password that Cardinal Health CSOS requires in the final step of the ordering process.

👍 Helpful tip:

The registration process is also the process to reset your CSOS signing password.

If you forget your password, for increased security, you must re-register your signing certificate and create a new password. Cardinal Health does not have the ability to retrieve the old password.

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›› Notifications

The Notifications page can be accessed via the header.

For email notifications, user can enter up to three email addresses separated by comma (no extra spaces).

Users can choose to receive the following notifications:

- **DEA Certification Expiration**: Receive an email 90, 60, 30, 15 and 7 days prior to expiration of your DEA Certificate.
- **CSOS Order Receiving**: Receive an email 24 hours after order has shipped if order status is "Not Received".

›› Submit CSOS Order

Use Order Express to check product availability and use the Analyze Order feature to review your order for Alternatives and Substitutes.

- Within the Shopping Cart on your C2 order, select the Electronic (CSOS) option and then click the Submit Order button.
- When you submit the order from the Shopping Cart, the Verify Order Information pop-up message displays, and you are prompted to enter the Unique Tracking Number (UTN). For Specialty C2 products, the Distribution Center address will reflect the SPD facility in La Vergne, Tennessee.
- Validate the information in the Verify Order Information pop-up message and then click the Submit button.

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Sign your CSOS order

C2 Availability Check

CSOS Order "21XCO0002"

Product availability check is complete

Sign Order Now

CardinalHealth   Order Express

Home | Lists | Order History | Returns | Reports | Admin

Welcome: User_Name
Select Organization   Log Out

Home :: Shopping Cart :: Order Confirmation
1234567890
Product Availability Response

View Backorder List >

Your order has 0 Exceptions.   View exceptions

Available for backorder: 0
Automatically backordered: 0
Not Available for backorder: 0

Columns | Print | Export [xls]   Review your CSOS order and submit your electronic signature   **Sign Order**

PO #:12345   1 lines   Total Cost: $0.00

Invoice #:   Customer #:   1234567890   Confirmation #:1234567890
Sales Order #: 85136081   Customer Name: My Pharmacy   Order Status: Open
PO Memo: Customer Address: 111 MAIN STREET   DC Name: DENVER
Order Date: 11/03/2020 04:00 PM   HOMETOWN, USA 12345   DC Address: 4770 (U) FOREST STREET
Order Type: C2 /20XDP4788   DENVER, CO 80216-0000
Submitted By: User_Name   HIN :   6BN9LXV00

View: All | Exceptions | Alternate DC Availability

SEL	ORDER QTY	SHIP QTY	ORIG QTY	SUB	CIN	OMIT CODE	NDC/UPC	TRADE NAME	GENERIC NAME	STRENGTH	FORM	SIZE	UNIT OF MEASURE	TYPE	COST*	CONTRACT	TOTAL COST	DESCRIPTION	FINELINE CODE	GCN
	1				3905288		00409-2029-02	MORPHINE SULFATE	MORPHINE SULFATE	1MG/ML	PPCA	10X30 ML	ML	C2	$0.01	1 - Infused	$0.00	MORPHINE1MG/ML10X30ML PF VL C2	8500	99776

For Selected: Cart

Sign Your Order   X

To sign your order, enter the password you created when registering your DEA certificate.

Signing Password: [ ]

If necessary, click Forgot Password below to register your certificate again and create a new password. Please contact the Customer Service Center at 800-326-6457 if you require additional support.

Forgot Password   Cancel   **Sign Order**

Once the CSOS order has been submitted, the C2 Availability Check pop-up appears. The system then confirms the quantity of the C2 product that is available for the order.

- When the available quantity is confirmed, you will be prompted to click the Sign Order Now button if you are authorized to sign C2 orders. If you are ordering the C2 products and another person is authorized to sign C2 order, the system will prompt you to click the Sign Order Later button.
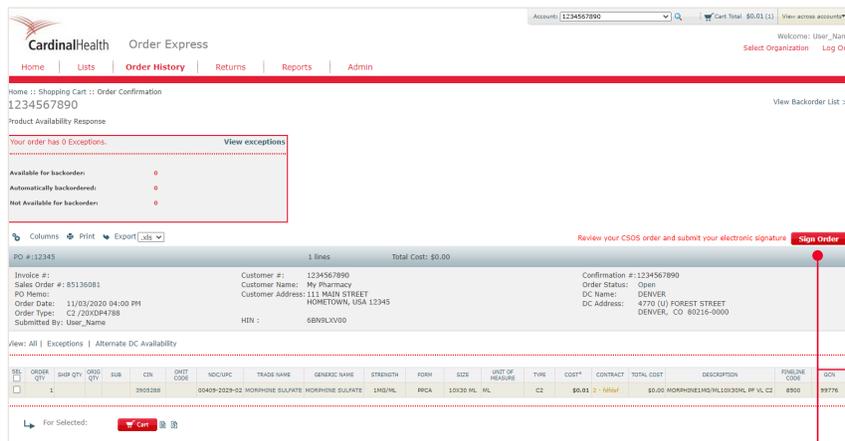
- When you click the Sign Order Now button, you will be taken to the Product Availability Response page. The Product Availability Response page allows you to review your order, place exceptions on backorder, and sign your CSOS order.

- Enter your signing password and click the Sign Order button.

- You may also sign your order later by clicking the CSOS Action Required link within the Alerts and Messages of Order Express or by navigating to the Order Confirmation page via Order History.
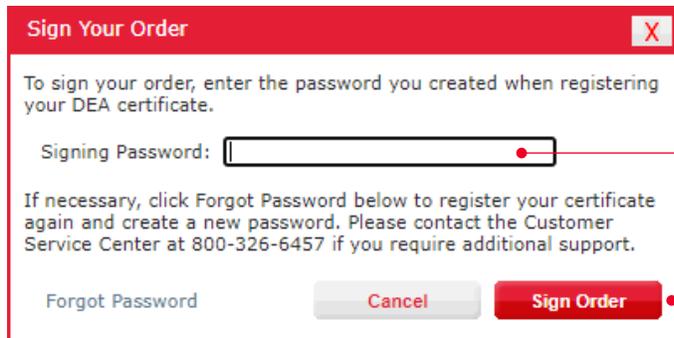
Once you have signed your C2 order, this completes the CSOS ordering process.

👍 Helpful tip:

If you have not yet registered your DEA certificate and you select the **Electronic CSOS** option, you will be prompted to register your DEA certificate. Simply click the **Continue** button and follow the steps outlined above in the **Register DEA Certificates** section of this document.

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» Accessing the CSOS orders

There are multiple ways to access CSOS orders from Order Express.

- You can navigate to the Order History page in Order Express and click the Manage E222 & CSOS Orders link to view a summary of CSOS orders.

- You can also access the CSOS Orders page through Quick Links on the Order Express homepage by clicking CSOS Administration and navigating to the CSOS Orders tab on the header.

» Receiving CSOS products

You can maintain your CSOS receiving list online for up to five years and access it through Order Express.

When an order has shipped, the Cardinal Health system automatically populates the Date Received and Received Quantity fields. When you are on the e222 page, you can receive those orders and edit the required data fields. You can view and print your CSOS receiving list online for up to five years and access it through Order Express. When an order has shipped, the Cardinal Health system automatically populates the Date Received and Received Quantity fields. CSOS orders placed using an e222 cannot be modified once executed. Certain aspects of the e222 form can be edited (received qty, date received, and notes fields) for up to 60 days for products that may be on backorder.

1. Click on the blue UTN link on the CSOS Orders page of the order you would like to receive.

» **Receiving CSOS products** (continued)

2. You will be navigated to the e222 page. Update the Received QTY column to reflect the actual quantity received for each product.

3. If you received a quantity of 0, you are able to acknowledge and receive the product and order.

   Note: If there is any deviation in the Received QTY column from the Shipped QTY column, a comment for DEA auditing purposes is recommended.

   Please comment any discrepancies within the Notes column. Click the Notes icon to open and enter your notes. If you attempt to put a larger received quantity than the shipped quantity, you will see an error message requesting you to contact Customer Service.

4. Click on the Notes icon to enter your backorder and other comments.

5. If you happen to receive an overage, contact Customer Service. You may be able to keep the product; however, a new UTN will be needed for the extra product.

6. Once you have reviewed the e222 page and/or made edits, check the checkbox in the lower left to acknowledge that the information in the e222. This acknowledgment enables the Save button. Clicking on the Save button marks the order as received. If you would like to discard any changes made, click the Discard button.

7. Click the View Order Edit History link to view all changes made to the e222 form.

👍 Helpful tip:

You can enter and save **Notes** without receiving the order or without acknowledging the order.

》 Receiving CSOS products (continued)

8. The link takes you to the Order Edit History page. The history is ordered by line number first in ascending order, and then date modified in descending order. To view notes, hover over the Notes 📑 icon.

》 CSOS Orders page

CSOS enhanced user experience

Now that we have covered the basic workflow, let's dive into the details of the Cardinal Health CSOS application that allow for an enhanced and efficient experience that saves you time.

Download multiple selected **e222s**.

Click the **UTN** link to navigate to the **e222** page for that order.

View and sort by:

- Order Status (either Received or Not Received)
- UTN
- PO Number
- DEA Number
- PO Order date and time
- Person who last modified the order

Features accessible on the CSOS Orders page:

- Search for orders by Date Range: Default is past 90 days. Any order created in the last five years of the specific Ship-to account can be viewed. Enter desired date range in the date field and click the Update Range button.
- Search for orders by PO#, DEA#, or UTN and click the Refresh button to update results.
- Download multiple selected e222s.
- Batch Download all e222s in Date Range.
- Show the list of CSOS orders, default sorted by date created with the most recent orders at the top.
- The generated PDF file is available for download for 30 days on the Downloads header menu option.

You have the option download multiple selected e222s, or batch download all e222s in a select date range.

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» Download e222

- You can select one or more check box on the list of orders to download.
- Once you select a check box, the Download button is enabled, and you can choose the format to download the file (PDF, XLS or CSV).

» Batch Download e222

- If you want to download all the e222s in a selected date range (could be multiple pages), then click the Batch Download button at the top of the CSOS Orders page.
- Once the Batch Download option generates the PDF file, you can download. (Can take up to 24-48 hours).
- The generated PDF file is available for download for 30 days on the Downloads header menu option.

» e222 page

Features that allow for an efficient receiving process include:

- Option to apply date to multiple fields
- Download of a single e222
- Option to add Notes without receiving order
- Backorders

To apply the same date to multiple lines, the user can select the check box at the beginning of each line number desired, then choose a date and select the "Apply this date to all selected fields" option.

The Download button is enabled, and you can choose the format to download the single e222 file (PDF, XLS or CSV).

Notes can be viewed/edited by clicking the Notes icon. User can enter up to 1000 characters for the note. The **X** icon closes the window.

» Backorders

If you are enabled for backorders, you are able to view and receive backorders:

- Full backorders populate on the same line
- Partial backorders populate on multiple lines

👍 Helpful tip:

Add a Note in the **Notes** column for the item that is backordered.

» View Certificates page
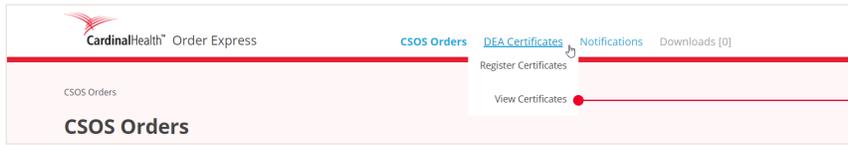
You are able to view all certificates that you have registered.

You can access the View Certificates page from the DEA Certificates header drop-down.
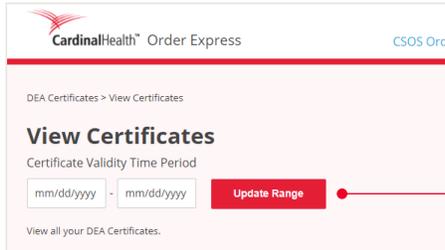
- Certificates can be searched by Certificate Validity Time Period. All certificates are shown by default; however, you can choose the Certificate Validity Time Period you want to filter.

- You can also search the list of certificates by DEA Number or Certificate Serial Number.

- The Reset button resets the search and restores the normal view.

- You can choose your preference to view either 20, 50 or 100 Certificates Per Page. If there is more than one page, you can navigate to the page by choosing the page number or clicking the Previous/ Next button.

- You can view the certificate details by clicking the DEA Number link.

NOTE: Displayed prices, names and accounts in the document are for training purposes only.

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