**CSOS overview**

The Controlled Substance Ordering System (CSOS) allows for secure electronic controlled substance orders without the supporting paper DEA Form 222. Using a technology called Public Key Infrastructure (PKI), CSOS requires that each individual purchaser enroll with the DEA to acquire a CSOS digital certificate.

CSOS subscribers achieve the following benefits:

- **Faster transactions:** CSOS certificates contain the same identification information as the DEA Form 222, which allows for timely and accurate validation by the supplier. Faster transactions allow for just-in-time ordering and smaller inventories.
- **Accurate orders:** CSOS reduces the number of ordering errors.
- **Decreased cost:** Order accuracy and decreased paperwork result in a lower transaction cost.*

This manual will take you through the phases of the CSOS solution from Cardinal Health and provide you with an overview of the following phrases:

**Prerequisites** – This section covers items that are required to be in place prior to the actual setup of the CSOS account (i.e., Links to requesting DEA certificates, importing and activating DEA certificates, systems requirements, etc.).

**Ordering** – This section covers the ordering, receiving, record retention and archiving processes for CSOS.

**Other links** – Links to other pages on the DEA page including the DEA FAQ and glossary.

*http://www.deaecom.gov/CSOS_FinalRule.pdf  DEA Final Rule, Page 24. DEA estimates that issuing and processing a Form 222 order costs purchasers about $26 and suppliers about $13. In contrast, issuing and processing a digitally signed order will cost about $2.60 for purchasers and $3.00 for suppliers.
Prerequisites overview

This section covers items that are required to be in place prior to the actual setup of the CSOS account (i.e., Links to requesting DEA certificates, importing and activating DEA certificates, systems requirements, etc.).

At-a-glance CSOS system requirements

In order to place Controlled Substance Ordering System (CSOS) orders with Cardinal Health, the following hardware and software requirements must be met on the PC on which the Cardinal Health CSOS solution will reside.

**Hardware requirements:**

- Windows Vista and Windows 7
  - 1 GHz or faster Pentium III processor
  - 1 GB of RAM (2 GB recommended)
  - 500 MB disk space for the Axway Activator software
  - At least 400 MB for data storage
- Windows XP
  - 800 MHz or faster Pentium III processor
  - 512 MB of RAM (1 GB preferred)
  - 500 MB disk space for the Axway Activator software
  - At least 400 MB for data storage

**Software requirements:**

- Windows XP with Service Pack 2 or higher or Windows Vista Business or Enterprise, Windows 7 Professional or Enterprise (Windows 2000 is not currently supported)
- Internet Explorer 6.0, 7.0, or 8.0 (Will not work with Mozilla Firefox or Safari)
- Adobe Reader
- Java Runtime Environment (JRE) 1.5.0_11 or 1.6.0_20

**Software recommendations:**

- Microsoft Excel or Microsoft Works (In order to update the Order History files with the receiving date, we recommend that you utilize Excel or Works; you may open, edit and save the CSV file with Internet Explorer.)

**Other requirements:**

- Must have applied for, received and activated your DEA digital certificate.
- DEA digital certificate must be activated on the PC from which CSOS orders will be placed
- Must have access to your C:\ drive (hard drive)
- Any individual placing CSOS orders must have Administrator Rights on the PC where CSOS will be installed in order to successfully install and run the CSOS Axway Activator software.
Network requirements*: 

- In order to download the CSOS Axway Activator Software we will need to have https and telnet traffic open on port 443 to https://csosprovision.cardinalhealth.com

- The CSOS Activator software sends documents through port 4080 to Cardinal Health. Normally port 4080 is locked down to just incoming traffic. However some facilities (commonly hospitals or retail chains) have port 4080 completely blocked to incoming and outgoing traffic. If port 4080 is completely locked down to outbound traffic (customer to Cardinal Health) your IT/IS department must configure port 4080 to allow traffic through the following IP addresses:
  - Allow network:
    - 199.230.128.0 NETMASK 255.255.128.0
    - 198.89.160.0 NETMASK 255.255.240.0
    - 198.89.176.0 NETMASK 255.255.248.0
    - 198.89.184.0 NETMASK 255.255.254.0

- Additionally, the CSOS Activator accesses a mailbox to retrieve “return” documents for CSOS. Below are the addresses to the Secure Web Mailbox sites which the CSOS Activator needs to access. Your IT/IS departments must allow access to these URLs in order to retrieve the required CSOS documents:

  http://CCPMailbox.cardinal.com/CCPMailbox
  http://CCPMailboxStage.cardinal.com/CCPMailbox

*If you are utilizing a high security network, these network requirements may be applicable to you. Please contact your IT/IS department for further assistance.

Links to importing, exporting and activating DEA certificates

To retrieve your certificate(s), you will need:

- An activation email from regauth@deaecom.gov containing your certificate Access Code
- A postal mail activation notice containing your certificate Access Code Password and Web site login information

What does retrieval do?
CSOS certificates are digital computer files that must be downloaded onto your computer. Activating your certificate must be done within 60 days of the date printed on your postal mailed activation notice.

Need assistance with exporting, importing and activating your certificate?

It is very important to activate your certificate successfully. Please print the following instructions before getting started.

http://www.deaecom.gov/retrieveinst.html

To activate your certificate(s), access the Web site listed on your activation notices.

Export instructions

http://www.deaecom.gov/export_IE.html

Import instructions

http://www.deaecom.gov/import_IE.html
Sending CSOS orders

To place a CSOS (C2) order using Order Express:


1. Enter Username/Password.
2. Select an account from Account Selection drop-down.
3. Add product by one of the following ways:
   - Enter product in the Search box and click GO.
   - Scan product into Order Express using the Desktop scanner.
4. Select your item(s) from the product search results by placing the quantity you would like to order in the QTY column.
5. Select the Cart button to add your C2 products to the shopping cart.
Sending CSOS orders (continued)

6. In the shopping cart, click on **C2 Sales Order** tab to view the order.

**Note:** You have the option to select **Do Not Sub** for individual items.

7. Click on **Submit Order.**

8. A **Confirm** dialog box will open, click **OK.**

9. Verify your ordering information and click **Submit.**
Sending CSOS orders (continued)

10. You will be put through a quick C2 availability check.

11. You will receive one of two responses to your C2 availability check:
   - Response One – If your response indicates **Sign Order Later**, click this button and you will return to the home page. You will then proceed to **Step 12** below.
   - Response Two – If your response indicates **Sign Order Now**, click this button and you will proceed to the **Order Confirmation**. You will proceed to **Step 14** on the next page.

12. You will see a CSOS Action Required message in the Alerts and Messages section of the home page. Click the **Link** or navigate to the **Order History** page to sign your order.

13. Locate the **Sales Order** and click on **Signature Required** in the **Order Confirmation** column.
14. **Review order** and click **Sign Order** button to submit electronic signature.

15. Select **file path** for DEA certificate. Enter password and click **OK**.

16. A **diagnostic box** will show the approval process of your digital signature.
   - If your **signature is successful**, the status bar within the dialog box will be **blue** in color and reach 100 percent. You will then proceed to Step 17.
   - If your **signature fails**, the status bar will show **red** in color, the **Cancel** button will change to a **Close** button and a reason code will be displayed.
Sending CSOS orders (continued)

17. Your successful C2 submission is displayed.

18. You can Print the DEA E222 form for your records.

19. Select Home to continue your other ordering activities.

20. To view your order confirmation or E222 Form, you will need to locate your order within Order History.

   **IMPORTANT**: It could take up to 20 minutes before you will see your order confirmation.

21. If you do not see CONFIRMED under Order Status, click the Refresh button.

Order Confirmations can be viewed in one of two places:

- If your order has *not* been invoiced, it will show under the Confirmed Sales Order section within Order History.
- If your order *has* been invoiced, it will show under the Invoiced Sales Order section within Order History.
Sending CSOS orders (continued)

To view your E222 form from **Confirmed Sales Orders**, locate your order and click **View Confirmation** to open, then click the **DEA E222 Form** link highlighted in the **Order Confirmation**.
Sending CSOS orders (continued)

To view or reprint your E222 form from Invoiced Sales Orders, locate your order, click on the Invoice # to open, then click the Confirmation # within the Invoice Detail header to go to the Order Confirmation. On the Order Confirmation page, click the Print DEA E222 Form link in the upper right corner.
Receiving CSOS orders and document retention

Records of all electronic C2 Narcotic Orders must be retained and archived electronically for a period of two years (see the CSOS Final Rule document).

The DEA Ruling states: “When a purchaser receives a shipment, the purchaser must create a record of the quantity of each item received and the date received. The record must be electronically linked to the original order and archived.” (Section G on page 51 of the CSOS Final Rule document).

The directory that contains your CSOS Documents for the Cardinal Health CSOS solution is typically C:\CardinalCsosActivator. Please ensure that you are backing up the entire directory on a regular basis – preferably after each CSOS(C2) order that is placed. You also will want to back up the folder that contains your CSOS Receiving Reports.

NOTE: Cardinal Health can only make suggestions on how to archive this information. Per the DEA, this information must be retained for two years and printed hard copy of this information is not acceptable.
Exporting orders from Order Express
Order History for receiving and document retention

1. Go to Order History and select the Invoiced CSOS Order you wish to export.

2. Select Export type from the drop-down box.

Suggestions for electronic archiving – After exporting your document, complete your receiving process by inserting the quantity received and the date received for all items on the invoice. Next, name and electronically save your document to a location of your choice on your computer.

Directions for returning C2 products to Cardinal Health

Due to DEA requirements and regulations, C2 items are unable to be returned via Order Express. Please contact Customer Service to receive the appropriate C2 item buyback and DEA forms to initiate the return process.

Other links

DEA webpage
http://www.deaecom.gov/

CSOS overview

CSOS DEA FAQ
http://www.deaecom.gov/qanda.html

CSOS glossary of terms
http://www.deaecom.gov/about_terms.html