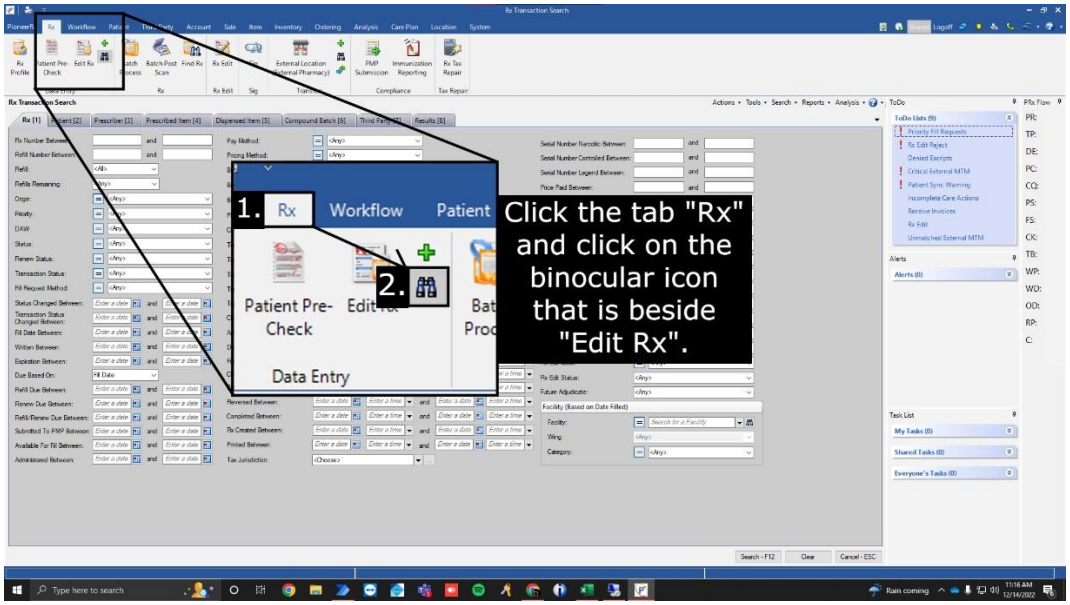
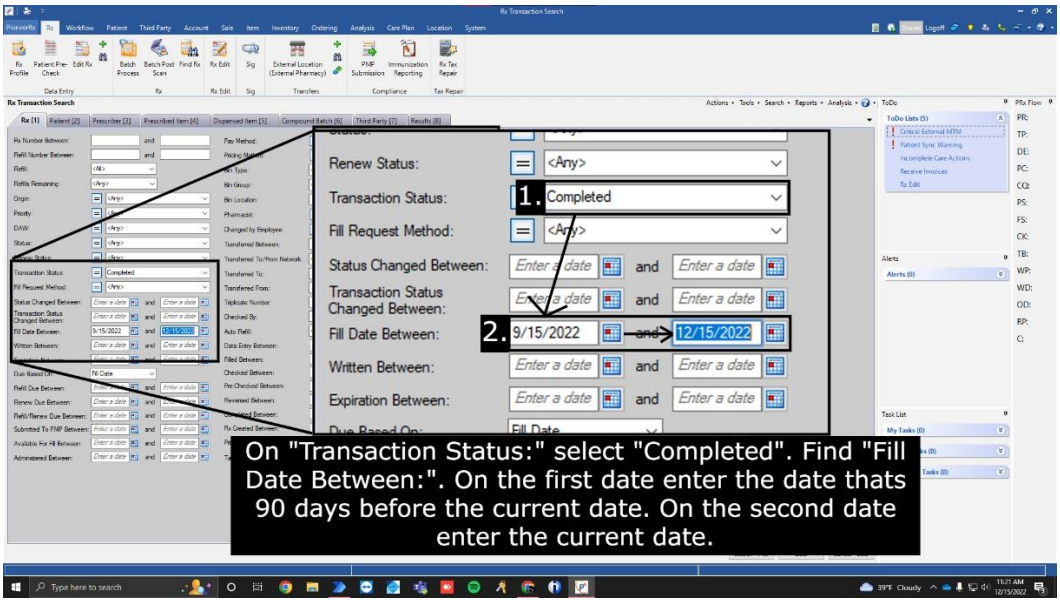
PioneerRX Usage Report Guide

Pulling an Extended Usage Report

1. When PioneerRX is open you should see several tabs at the top of the software. Click “Rx” and then click on the binocular’s icon that’s to the right of the “Edit Rx” button.



2. In the drop-down menu named “Transaction Status” click on “Completed”. To set the date range you need to make the first date be 90 days before the current date. The second date will just be the current date.



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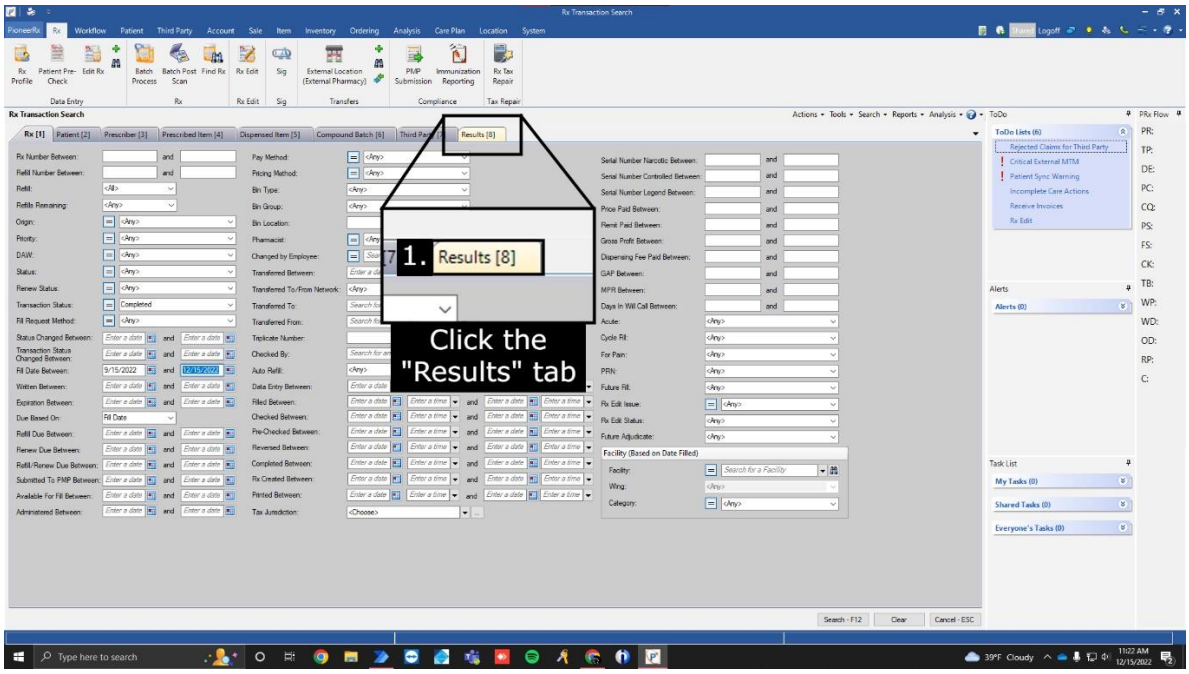
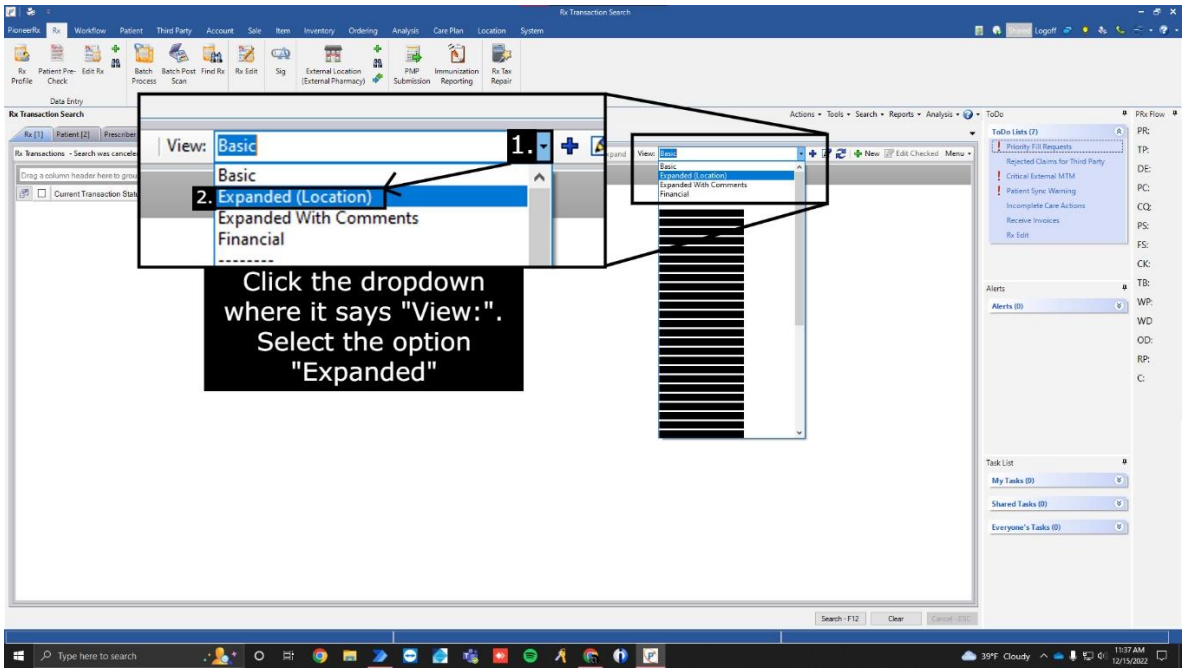
3. There's 8 tabs near the top of PioneerRX. Click on the tab named "Results [8]".



4. Clicking that will take you to search results screen, it should be blank as of now. At the top right of this screen, you will see a "View" drop-down menu. Click this drop-down and select "Expanded". This will start loading data and the search results screen should start to populate.



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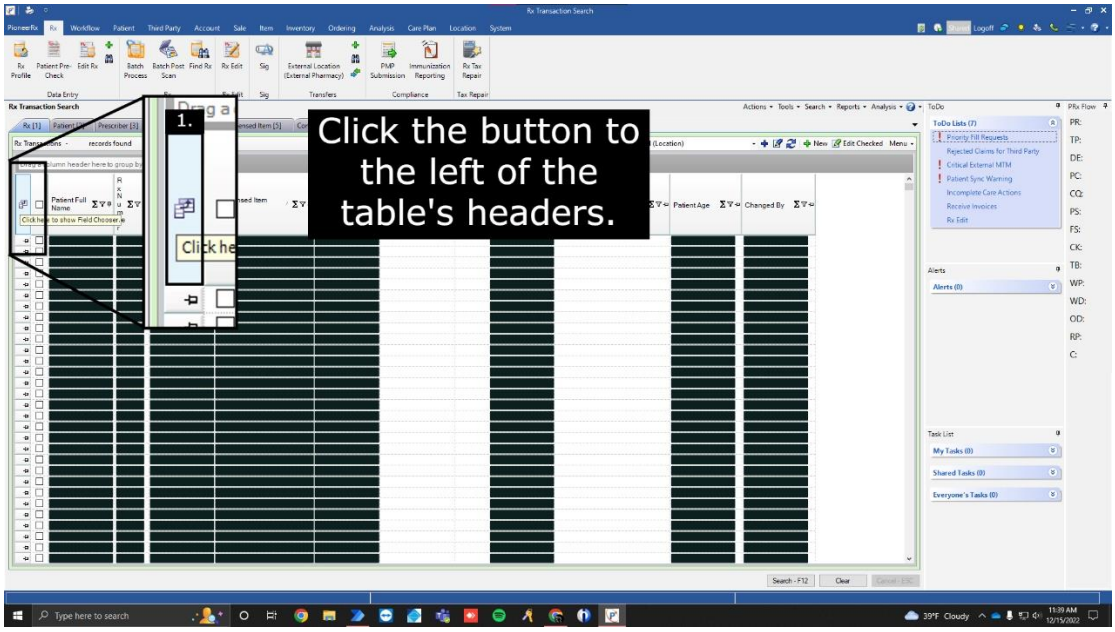
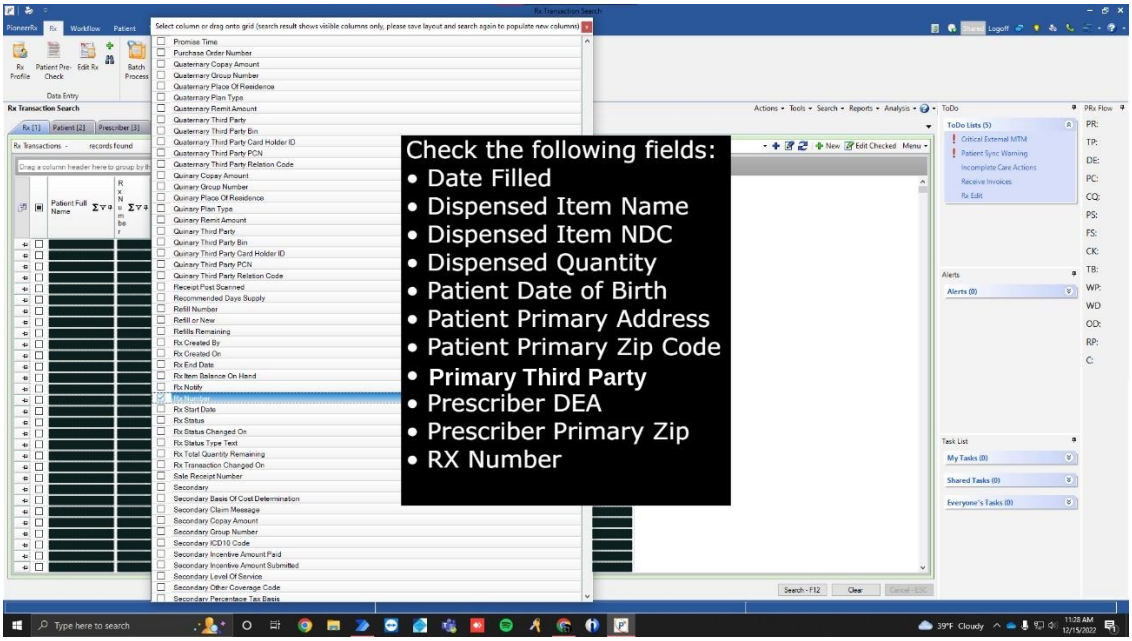
5. Once all the data has finished populating, hit the left-most button to the left of the table's headers. This will open a list of filters and fields.



6. This list shows all the fields that we need. Note that this list is in alphabetical order and other fields that aren't required should be unchecked: Date Filled, Dispensed Item Name, Dispensed Item NDC, Dispensed Quantity, Patient Date of Birth, Patient Primary Address, Patient Primary Zip Code, Primary Third Party, Prescriber DEA, Prescriber Primary Zip, RX Number.



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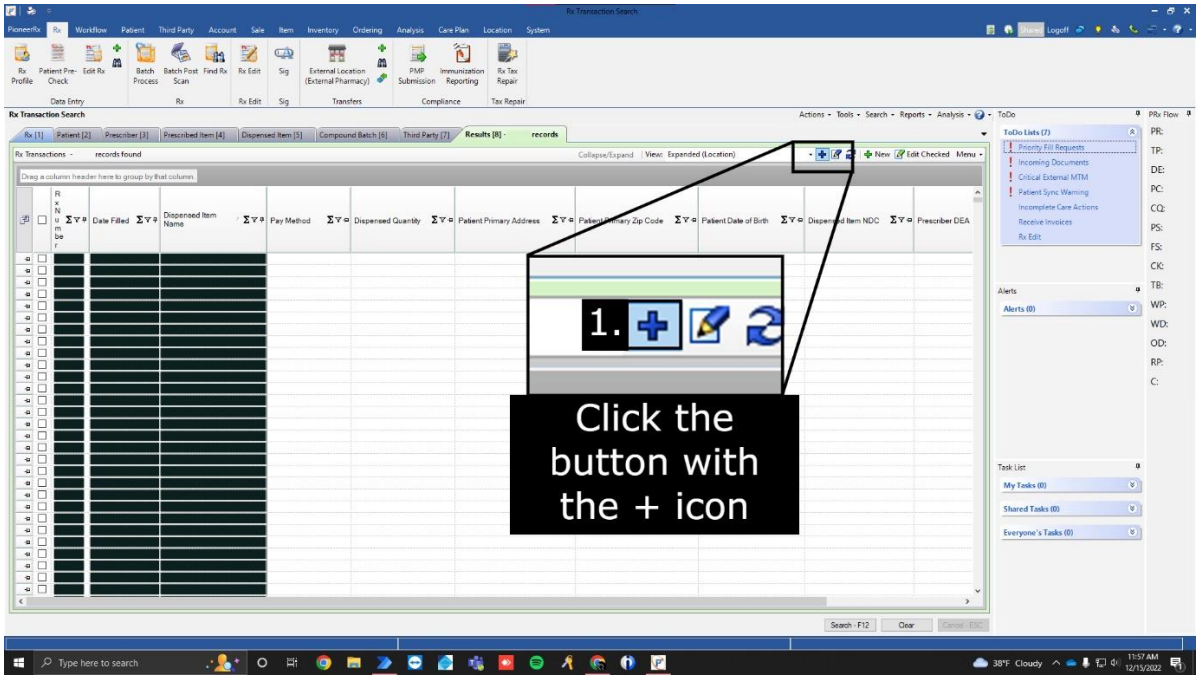
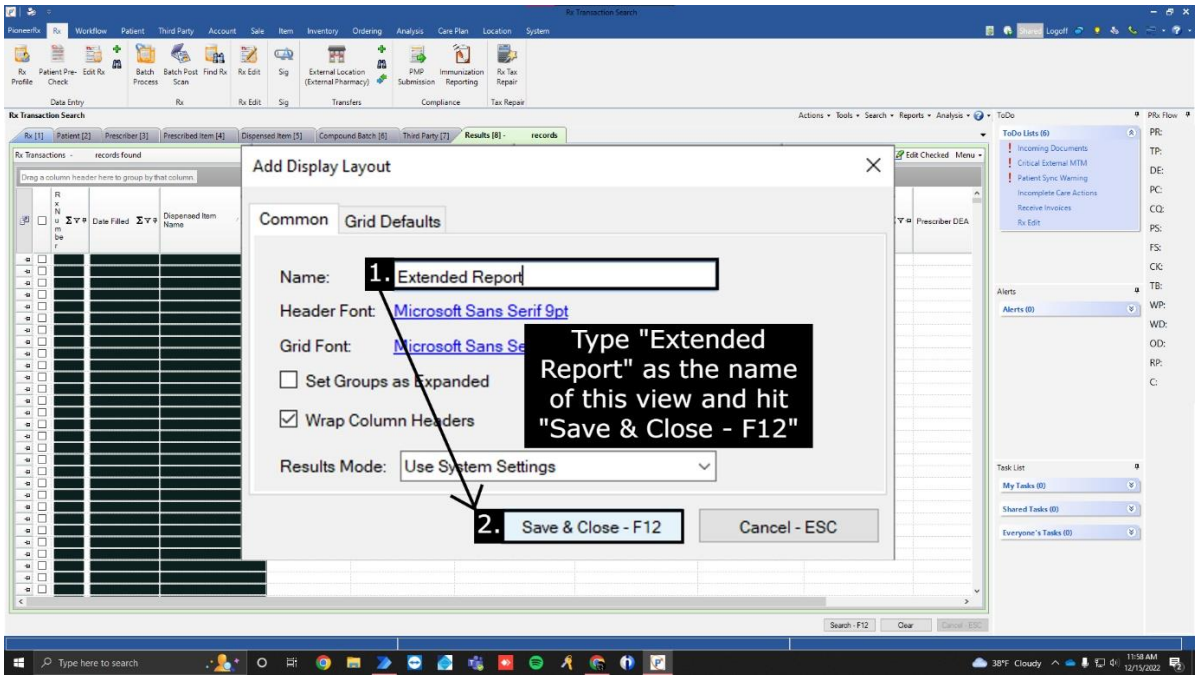
7. At the top right of the search results screen you will see a “+” icon. This will open a pop-up titled “Add Display Layout”.



8. As the name type “Extended Report” and hit the “Save & Close” button.



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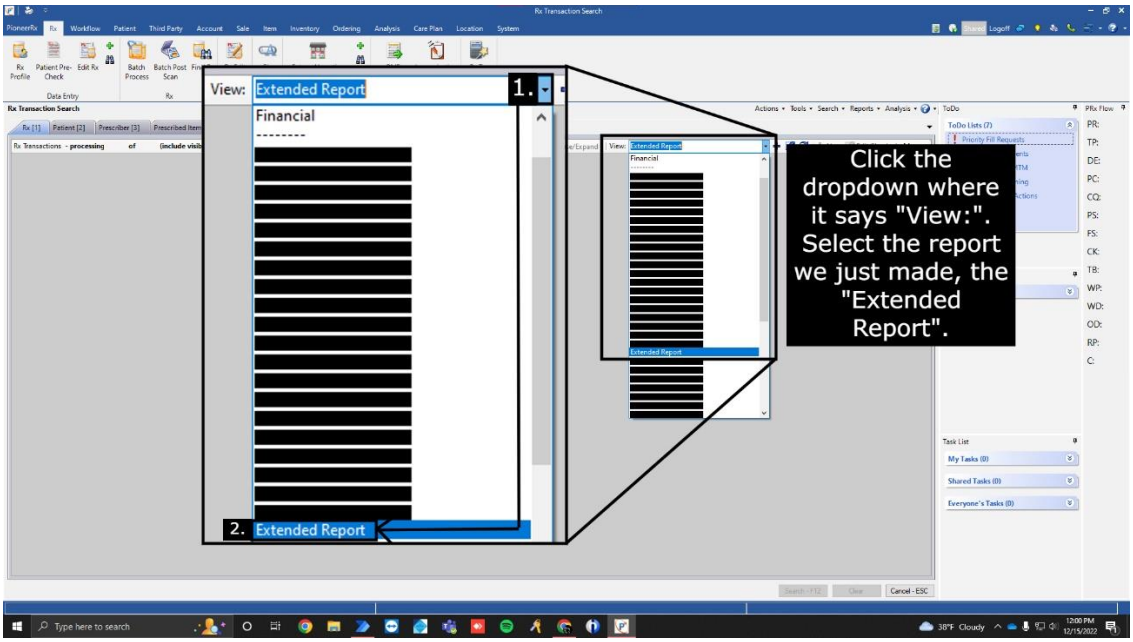
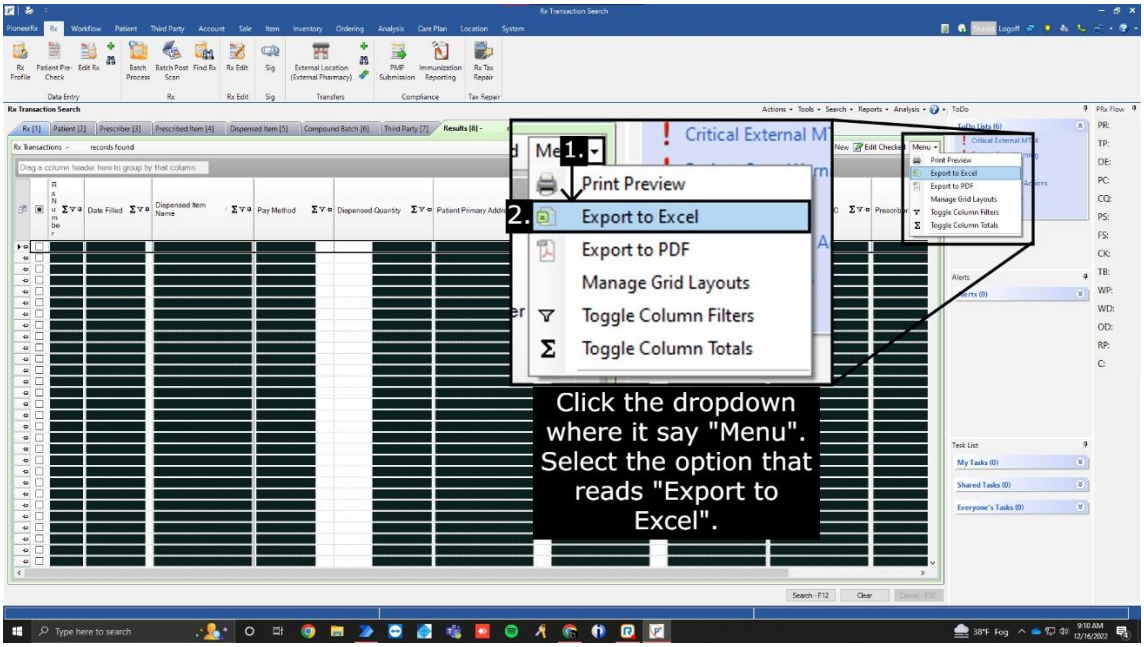
9. At the top right of the search results screen click the “View” drop-down again and select the report you just created. It will be named “Extended Report”. This will populate the search results screen with data again with everything we need.



10. At the top right of the search results screen click the “Menu” drop-down and click on the option “Export to Excel”. This will open the file explorer, navigate to the folder on your computer that you would like to save the report to.



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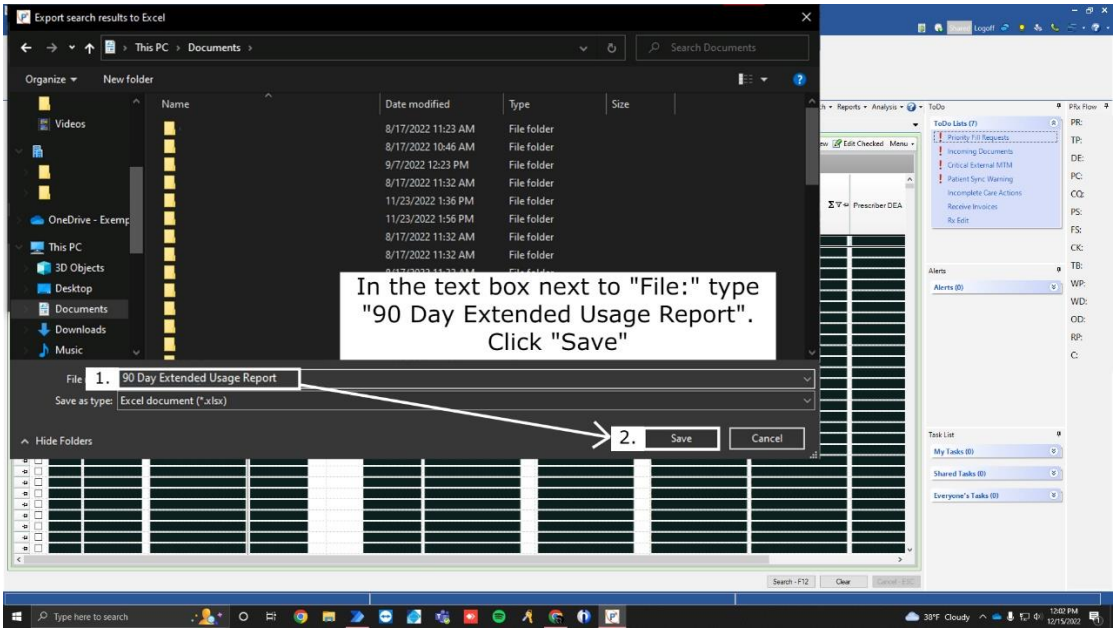
11. Name the file “90 Day Extended Usage Report” and click save. Now you’re ready to send this file to our Compliance department! Send this file to compliance@ipdpharma.com



How to Send the Report

All you have to do is fill out the form on our website here. Once you fill this form out hit the “Submit” button and that’s it! Thank you for reading.