

Patient Credit Card User Guide

8.3

Kroll Computer Systems Inc

To ensure the privacy and security of patient credit card information in accordance with Payment Card Industry (PCI) compliance, Kroll has designated an area in the software for entering such information. Permission settings within the system can limit access to this area to certain groups of individuals within the pharmacy.



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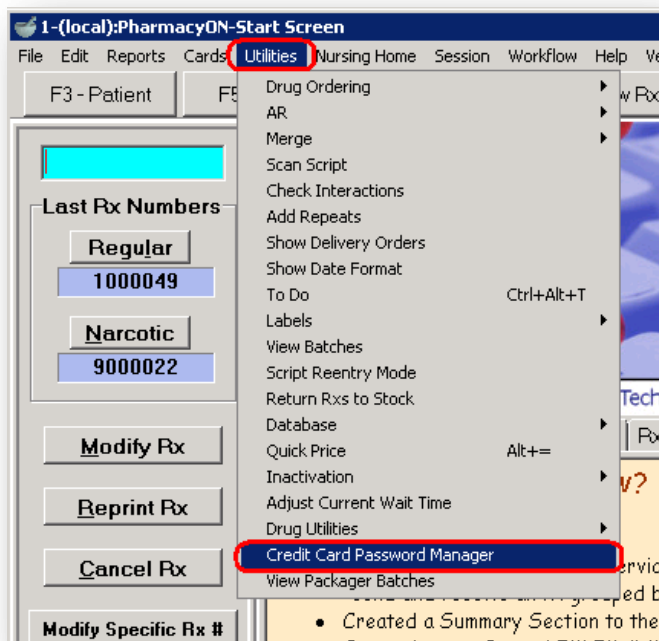
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Setting Up the Credit Card Access Password

Access to credit card information in KroLl depends on two criteria. Firstly, the user must be assigned a **user group** that has permissions to view credit card information. Secondly, the user must have knowledge of the **credit card access password**. All individuals with proper permission settings will use the **same** credit card access password to view credit card information.

Set up the **credit card access password** as follows:

1. **Utilities → Credit Card Password Manager → Login.**

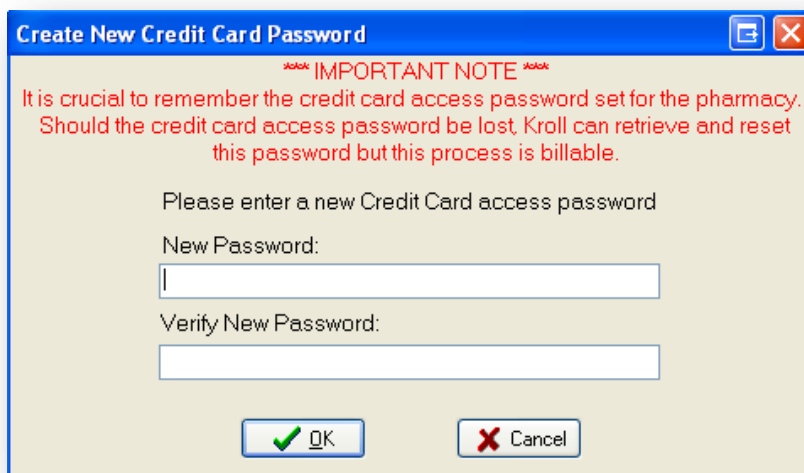


NOTE: This screen can only be accessed by users that have permission to enter the **Credit Card Password Manager** (See **Configuring Security Settings**, pg 9).

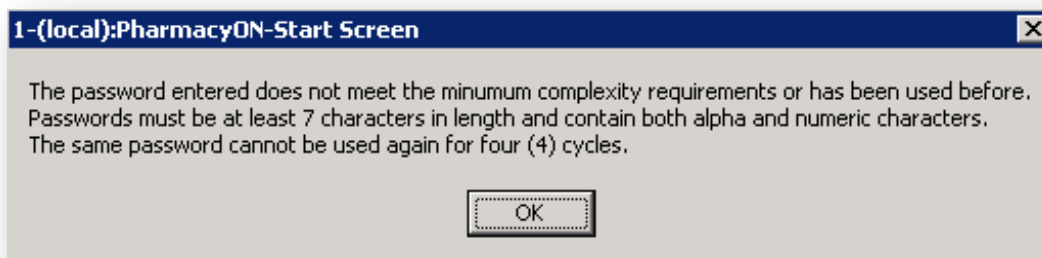
2. Click on **Create new Credit Card Access Password**.



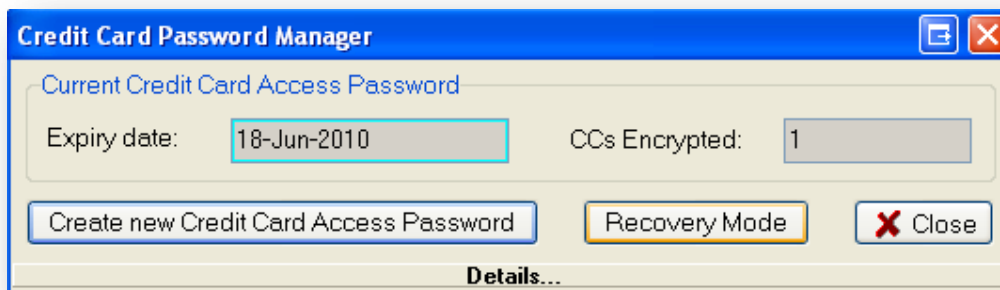
3. Enter the **Credit Card Access Password** and verify it below:



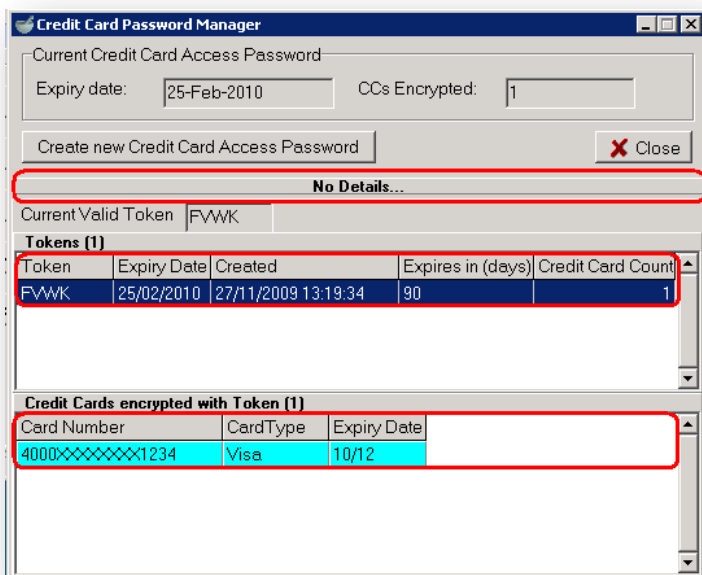
NOTE: The password must be at least 7 characters in length, contain both alpha and numeric characters, and is case sensitive.



4. Successful creation of a **credit card access password** will bring up the following screen:

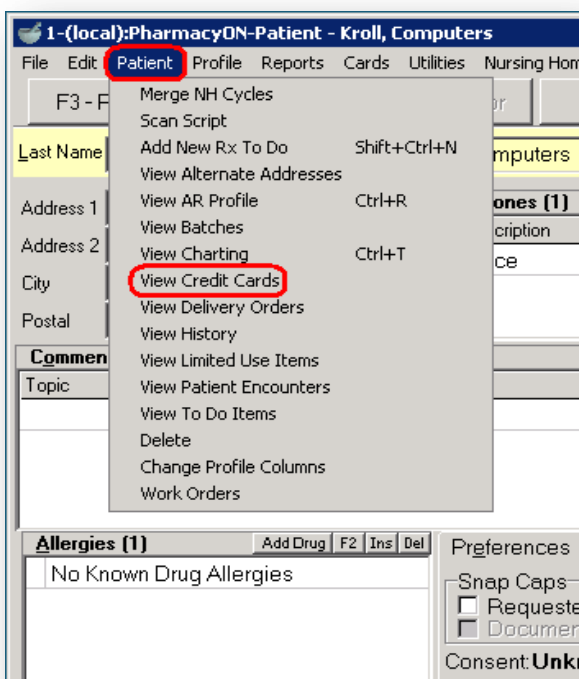


- a. **Expiry date:** This date is auto-generated for a three month period every time a new password is entered.
- b. **CCs Encrypted:** This number denotes the number of credit cards being encrypted.
- c. The **Details** button will show additional information regarding when passwords were created and when they will expire. Encrypted credit card entries are also shown here.

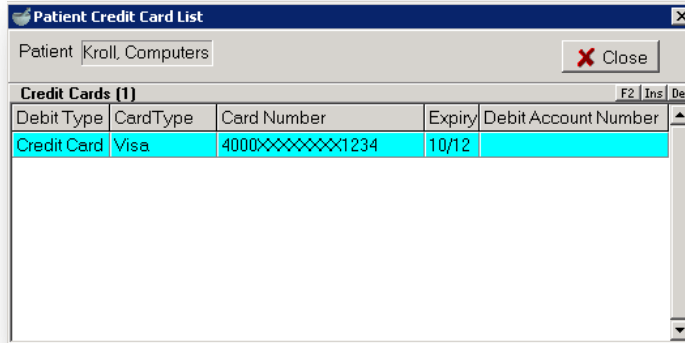


Viewing Patient Credit Card Information

1. Search and access the patient card.
2. Bring down the patient drop down menu and click **View Credit Cards**.

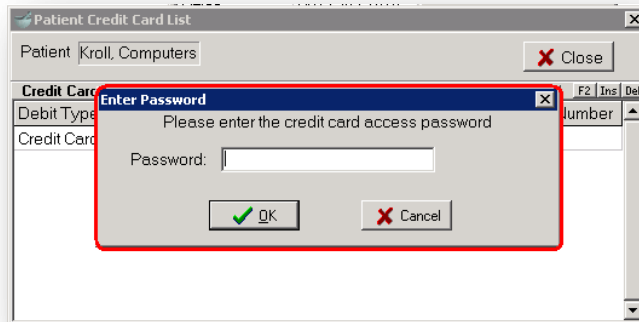


3. The following **Patient Credit Card List** will appear.

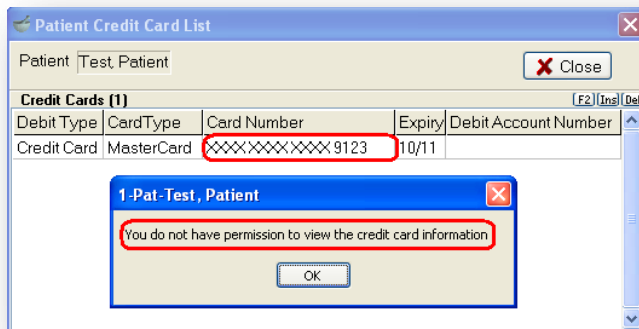


4. To view the entire credit card number, highlight the entry and **double click** or press **F2**.
5. The user will be prompted to enter the **credit card access password**.

NOTE: This is NOT the Kroll login password, but the alpha-numeric password set in the first section of this document.



NOTE: If the user logged into the Kroll session does NOT have permissions to view credit card information, they will NOT be prompted to enter a password and will receive the following message instead.



- Once the **credit card access password** is entered, credit card information can be seen:

Inserting Patient Credit Card Information

- Access patient credit cards from **Patient** → **View Credit Cards** and click on the **INS** button to add a new credit card entry.

Debit Type	CardType	Card Number	Expiry	Debit Account Number
Credit Card	Visa	4000XXXXXXXX1234	10/12	

NOTE: The **F2** button will **View/Modify** an existing credit card entry.
 The **DEL** button will **Delete** an existing credit card entry.

- Pressing **INS** will call up the following **Patient Credit Card Information** screen

Patient Credit Card Information

Debit Type: **Credit Card**

Card Type:

Card Number:

Expiry Date:

Cardholder Name:

Address Link: **Default**

Address 1: 220 Duncan Mill Road

Address 2:

City, Prov: Toronto ON

Postal, Country: M3B 3J5 Canada

OK Cancel

- a. **Debit Type:** Select from Debit Card or Credit Card option
- b. **Card Type:** Select from American Express, Visa, MasterCard, etc.

NOTE: The credit cards listed in the drop down menu for **Card Type** can be configured to the cards accepted by the pharmacy in **Edit** → **Lists** → **Master List** → **Credit Card Type**

Edit Mast Lists / Groups

Master Lists Patient Groups Drug/Mixture Groups Doctor Groups

Lists: **CreditCardType**

ReOrder

CreditCardType

Display Value	Seq
Visa	1
MasterCard	2
American Express	3

F2 Ins Del

- c. **Expiry Date:** Enter the expiry date of the credit card
 - d. **Cardholder Name:** Enter the name listed on the credit card
 - e. **Address Link:** The default is set populate the patient's address from the patient card
3. Click/Press **OK** to save changes.
 4. The system will ask for the **credit card access password** in order to save.

Enter Password

Please enter the credit card access password

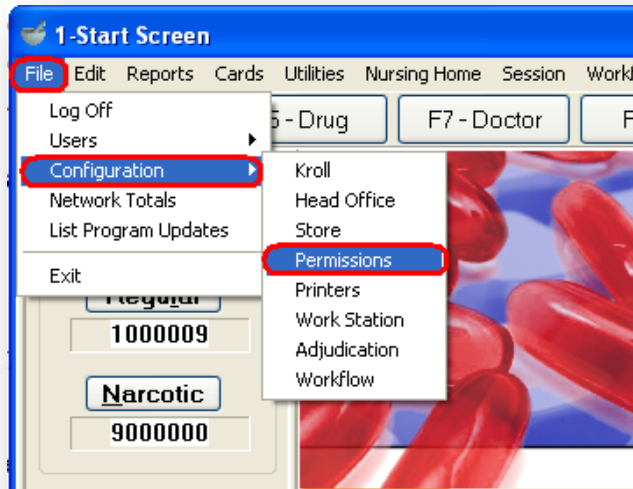
Password:

OK Cancel

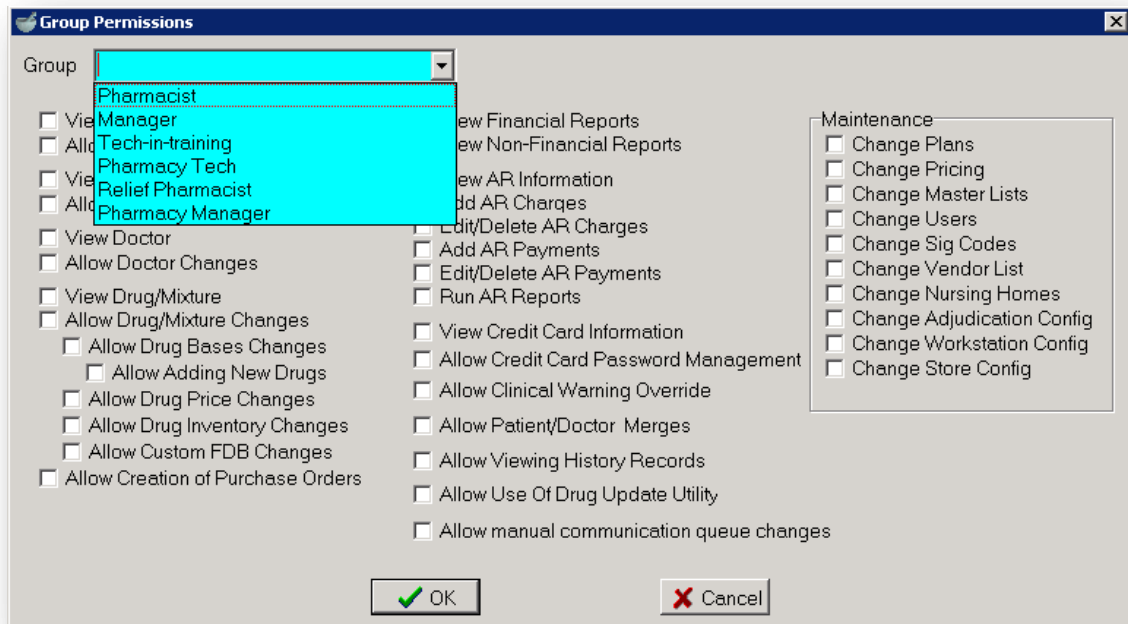
Configuring Security Settings

Access to credit card information in Krill can be limited to certain groups of individuals within the pharmacy. To do this, permission settings for **user groups** must be configured to allow or restrict access to credit card information.

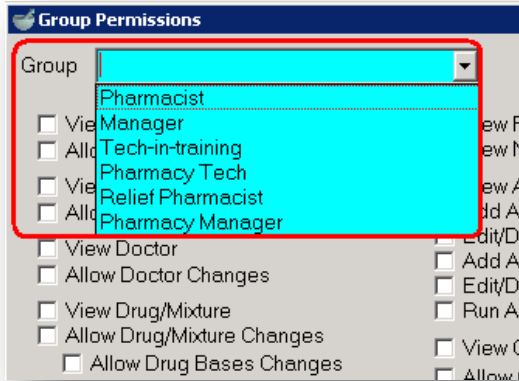
1. Access permission configurations in **File → Configurations → Permissions**



2. Login with Krill initials and password to gain access to the **Group Permissions** screen:

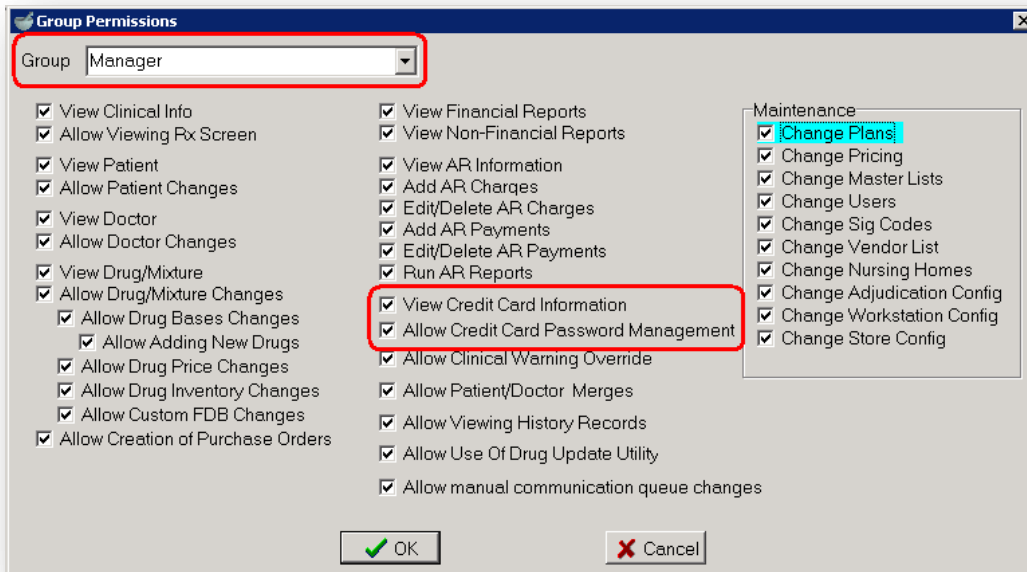


3. Select the **user group** from the drop down menu



4. There are 2 flags related to the access of credit card information:

- a. **View Credit Card Information:** Allows the **user group** to view credit card information upon entry of the **credit card access password**.
- b. **Allow Credit Card Password Management:** Allows the **user group** to enter/change the **credit card access password** in **Utilities → Credit Card Password Manager**



NOTE: Access to **credit card information** will depend on the user that is logged into the Kroll session and their associated **user group**.

Credit Card Access Password Recovery

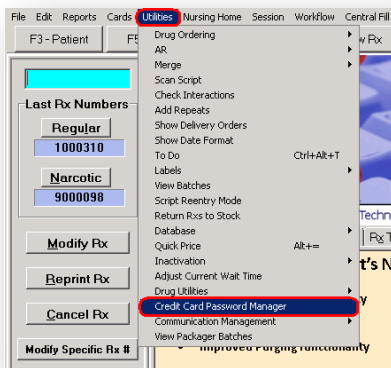
*****WARNING*****

It is crucial to remember the credit card access password set for the pharmacy. Should the credit card access password be lost, Kroll can retrieve and reset this password but it is a billable process and can take up to 24 hours.

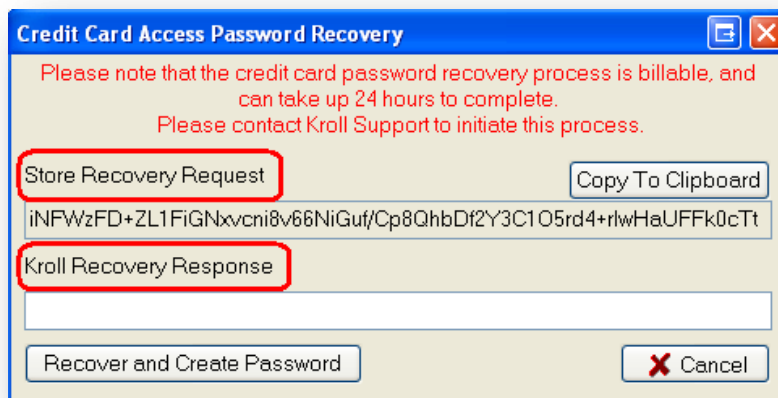
Begin the process of credit card password recovery as follows:

1. Go to **Utilities** → **Credit Card Password Manager** → **Login**.

NOTE: This screen can only be accessed by users that have permission to enter the **Credit Card Password Manager** (See **Configuring Security Settings**, pg 9).



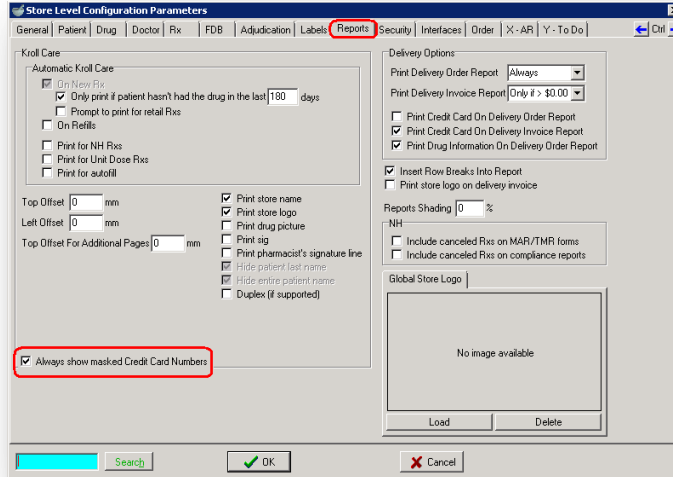
2. Click on **Recovery Mode**.



3. Call Kroll Software at 1-800-263-5876 extension 1 with the **Store Recovery Request** key.
4. Upon verification of the store’s identity, Kroll will provide and enter a **Kroll Recovery Response** key. A new credit card access password can be created at that time by clicking **Recover and Create Password**.

Masking/Unmasking Credit Card Numbers in Kroll Reports

1. Credit card numbers can be masked or unmasked in Kroll reports under **File** → **Configurations** → **Store** → **Reports**.



- a. When **Always show masked Credit Card Numbers** is checked, credit card numbers in Kroll reports will be masked and appear as follows:

Pre-Authorized Charges Report
Kroll Computer Systems Pharmacy

Pre-Authorized Charges Report Printed on: 27/11/2009 17:13:47

Credit Card

Name	AR Acct	Card Type	Cardholder Name	Card #	Expiry Date	Amount
Kroll, Computers		Visa	Kroll Computers	4000XXXXXXX1234	10/12	0.00
Total						
						AmericanExpress:
						0.00
						MasterCard:
						0.00
						Visa:
						0.00
						Other:
						0.00
						Total:
						0.00

- b. When **Always show masked Credit Card Number** is unchecked, credit card numbers in Kroll reports will not be masked and appear as follows:

Pre-Authorized Charges Report
Kroll Computer Systems Pharmacy

Pre-Authorized Charges Report Printed on: 27/11/2009 17:19:04

Credit Card

Name	AR Acct	Card Type	Cardholder Name	Card #	Expiry Date	Amount
Kroll, Computers		Visa	Kroll Computers	4000500030001234	10/12	0.00
Total						
						AmericanExpress:
						0.00
						MasterCard:
						0.00
						Visa:
						0.00
						Other:
						0.00
						Total:
						0.00

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