

Onboarding



WHAT TO EXPECT DURING IMPLEMENTATION

When can we access our account?

If the pharmacy self-registers online, the user is given immediate access to the account after registration. If the pharmacy submits an onboarding workbook, administrative access will be granted within 24-48 hours after the account has been activated. InfiniTrak encourages the pharmacy to log in and look around. Check out the training material on the right-hand side and familiarize yourself with the platform.

My pharmacy signed up online, what is next?

Now that registration is complete, log into your account, add the suppliers and the pharmacy license information.

To **add** suppliers:

1. From the dashboard, on the left, select 'Trading Partners'.
2. Select 'Request Trading Partner' (DO NOT use Create Trading Partner)
3. Search for the supplier and click 'Select.'
4. Enter the customer account number that appears on your invoice.
5. Add the sales representative's name and email address.
6. Select 'Request'
7. Repeat until all your suppliers have been added.
8. Make sure to include all suppliers even if you rarely purchase from a certain supplier.

Which suppliers should I add?

- Please include all wholesalers, distributors, and manufacturers, including vaccines.
- EXCEPTIONS include medical supplies, test strips, patient specific products, compounding, non-prescription supplements, and blood products. These exceptions are not currently governed by DSCSA.



(844) 463-4641



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Why does InfiniTrak need the sales representative's email address?

Many of the suppliers require the sales representative's contact information to submit the connection request.

What if the supplier is not on the drop down list?

If you cannot locate the supplier on the list, select the blue link at the top that reads 'Click here to request a new trading partner connection'. Fill in the information and send the request.

How do I know if my suppliers are connecting?

From the dashboard, select 'Trading Partners'. The right-hand column will show 'Waiting' if the connection has not been completed.

Do we need to contact our suppliers?

InfiniTrak's team will reach out to the pharmacy if we need you to contact your supplier. This usually happens around week 5 if the supplier has not been responsive to our connection requests.

What does 'Manual Only' mean?

Not all the suppliers can or will establish an electronic connection. Those suppliers are considered manual only because you will need to manually enter those transactions if you want to access everything in a single location. We strongly encourage pharmacies to reach out to these suppliers and inquire about their plans for DSCSA.

What if I need to add a new supplier?

The pharmacy can add suppliers to their account anytime. If after onboarding is complete, you decide to add another supplier, just follow the instructions to Add Suppliers.



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How do I add license information?

1. From the dashboard, on the left, select 'Manage Company'.
2. Under 'Locations' click on the pharmacy location and open it
3. Enter the pharmacy's phone number.
4. Enter the DEA# and expiration date.
5. Enter the Pharmacy's State License Number and expiration date.
6. If you know the GLN, enter it on this page.
7. Select 'Save'

How does onboarding work?

Once the pharmacy has completed the steps above, the Implementation team at InfiniTrak begins the onboarding process. InfiniTrak reviews and verifies license information, supplier information, and the GLN. InfiniTrak then sends requests to the suppliers asking them to create an electronic connection between the supplier and InfiniTrak. This allows the data to automatically flow into your account with each order placed. InfiniTrak will verify the data is coming into your account and follow up with the pharmacy if there are any issues. Onboarding is complete once all your suppliers have been connected.

How long does onboarding take?

Onboarding can take up to 6 weeks depending on how responsive your suppliers are to the connection requests. Many suppliers connect in under 2 weeks but some onboarding can take up to 6 weeks depending on how responsive your suppliers are to the connection requests. Many suppliers connect in under 2 weeks but some may take longer. For connections still not completed by week 5, InfiniTrak will include the pharmacy in a final email asking them to connect. This is also when InfiniTrak will contact the pharmacy to reach out to their sales representative directly and ask for assistance.



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What should I do if the supplier shows connected but I do not see transactions for my recent orders?

On occasion, a supplier will notify InfiniTrak that a connection has been completed when it has not. An issue with coding may make the connection look complete on their end but not allow the data to route to InfiniTrak. When this happens, please notify customer service immediately (844-463-4641, Support Button on the dashboard, or info@infinitrak.us). You will need to have the following information available: Pharmacy Name, Supplier Name, PO#, PO Date.

What should I do if the pharmacy was receiving transactions from a supplier but is not now?

When transactions suddenly stop appearing in your InfiniTrak platform, this usually means the connection is broken. This mostly occurs when suppliers change solution providers. When this happens, please notify customer service immediately (844) 463-4641, Support Button on the dashboard, or info@infinitrak.us). You will need to have the following information available: Pharmacy Name, Supplier Name and at least one recent PO#.

When will InfiniTrak contact the pharmacy?

We know the pharmacy is busy, we try and limit how often we interrupt the pharmacy with calls and emails. Once most of your suppliers have been connected, InfiniTrak will send an email verification. This will let you know which suppliers are connected. If we have completed a connection but have not received data yet, we will ask about recent orders from that supplier. This allows us to reach back out to a supplier who claimed to be connected but may be having issues.



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Can I get alerts to help monitor the pharmacy's data?

InfiniTrak's reporting tool can help the pharmacy monitor data, user access, validation errors, and more. Each report has a subscription option that will email the report on the selected day(s). We recommend the pharmacy subscribe to the following reports to catch any data issues so they can be addressed immediately.

- Transactions with Issues Received in last 24 hours by Location (daily)
- Transaction Count From Trading Partners in the Last Week by Location (weekly)

To subscribe to the email

1. Select 'Reports'
2. Select the specific report
3. Select 'Subscribe' & choose the day(s) to receive the email
4. Select 'Save'

****Don't see any reports...select the pharmacy location under 'Available Locations', select 'Assign' and Save****

If you are missing data or have errors on the data, please contact InfiniTrak. We will help troubleshoot the issue with the supplier.

What is a GLN and do we have one?

GLN stands for Global Location Number. It is a 13-digit number used to identify the pharmacy and is required for interoperability. You will not be able to receive products without a GLN. Part of the onboarding process includes InfiniTrak checking the GSI Datahub for a GLN for your pharmacy. If the GLN is located, we will enter it into your account. You can see the GLN by going to Manage Company and opening the location.



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What if InfiniTrak does not find a GLN?

If we are not able to locate a GLN for the pharmacy, we will email the pharmacy and provide detailed instructions on how to acquire your GLN. If you have any questions, please let us know.

How do we use the system, do you offer training?

We offer a variety of training options. We are currently hosting a weekly group training session that is open to all our customers. The pharmacy can register through The InfiniTrak Learning Hub. To access The InfiniTrak Learning Hub, select the blue button in the 'I want to' section on the right side of the dashboard. The InfiniTrak Learning Hub also offers a variety of Quick Reference Guides to help the pharmacy navigate various aspects of the platform and DSCSA compliance. If a group training session is not suitable, we can schedule a private online training session for your pharmacy staff.

Does the pharmacy need a special scanner?

InfiniTrak's platform works with most 2D barcode & HID scanners. Depending on the scanner, it may need to be programmed to read the GTIN. Most pharmacies use a 1D scanner in workflow for scanning NDC codes. For DSCSA compliance, a 2D scanner is required.

Can you please explain the SOP?

The SOP is a standard operating policy specifically for DSCSA compliance. The policy outlines the steps the pharmacy will take to comply with DSCSA regulations, including how to identify and investigate suspect products.



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The pharmacy already has a SOP, how is this any different?

The SOP for DSCSA details how the pharmacy will receive products and confirm that every product has matching transaction data, as well as how the pharmacy will handle any data discrepancies. The policy also details how the pharmacy will identify suspect products and the steps it will take to investigate to determine if the product is illegitimate. The SOP details quarantining and reporting illegitimate products to both the FDA and the supplier.

How do we write a DSCSA SOP, will InfiniTrak assist with it?

InfiniTrak provides a sample DSCSA Policy in both Word and PDF formats. Log into the InfiniTrak platform and select Documents. At the top of the screen, click on the link for the format you wish to use. Review the policy, fill in the blanks, and add any additional procedures. Once complete, upload the document back into your platform. Our compliance team is happy to assist with the SOP and can review it.

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