MedSelect™ Administrative WorkStation User Guide

v8.4.5

Innovative Pharmacy Solutions

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Safety Conventions

The following safety conventions are used throughout this manual:

A ***note*** indicates operation or maintenance information which is helpful to improve performance or operation.

A ***caution*** indicates a potentially hazardous situation exists which, if not avoided, may result in minor or moderate injury or product damage. A caution is noted by an exclamation point inside a yellow triangle, and the word "CAUTION!"

A ***warning*** indicates a potentially hazardous situation which, if not avoided, could result in death or serious injury. A warning is noted by an exclamation point inside an orange triangle, and the word "WARNING!"

This manual explains the correct way to use your MedSelect System. Failure to follow the instructions in this manual may result in delivery of incorrect medication or in missing medication, which could cause serious injury or death. Read this manual thoroughly and refer back to it often when dispensing from your MedSelect System. If anything contained in this manual is unclear to you or if it appears that any portions of the manual are missing, please contact your ARxIUM representative or call ARxIUM at 1-888-537-3102.

Typographic Conventions

bold italic

The names of buttons appear in bold italic Times New Roman or Arial. For example, select ***Exit*** instructs the user to click/touch on the Exit button on the computer screen.

italic

Book titles appear in an italic font. For example, refer to the *MedSelect Display Terminal User Guide*.

SMALL CAPS

Directories, paths, and file names appear in small caps. For example, C:\AUTOMED/DISPENSE is the directory location for the dispense file.

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Contents

Introduction

Welcome to the *MedSelect Administrative WorkStation (AWS) User Guide*. In this guide you will find information about using AWS to set up, monitor, and modify the MedSelect System to meet your dispensing needs.

AWS is a software application that runs on your networked PC via your server. Your site administrator assigns all or partial access rights to users to work within AWS confines. AWS software enables you to configure the following hardware and software applications:

Hardware

- The Display Terminal (DT) - a computer that makes it possible to dispense supplies for selected patients (MedOrders) or from a picklist, find supply and patient information, and restock system inventory.

- Unit Dose Module (UDM) - a dispensing device for controlled substances which dispenses medication in vials, ampules or packages using shelves with bins or coils (helixes). A UDM requires two types of controllers: shelf controllers, and lock controllers.
- Drawer Module (DM)/Compact Drawer Module (CDM) - a device you use to dispense and return or retrieve supplies using configurable pop-out drawers. Use standard drawers for general dispensing, use single item access (SIA) drawers to dispense controlled substances. You can designate any drawer for patient-specific dispensing.
- Standard Cabinet Module (SCM) using the Electronic Lock Controller (ELC) - a storage device with movable shelves. You can configure up to eight SCMs on an ELC.
- Electronic Lock Module (ELM) using the Electronic Lock Controller (ELC) - a locking mechanism you use for refrigerators/cabinets. You can configure up to eight ELMs on an ELC.
- Tower Module (TM) - a storage device with movable fixed and sliding shelves.
- Integrated Tower Module - similar to the standard tower storage device, also provides Drawer Module assemblies in the lower half of the Tower.

Software

- MedOrder - a pharmacist/doctor reviewed patient profile order that comes through an interface to a pharmacy or other hospital system.

- Centrack - a separate software application on dedicated hardware, that tracks and records controlled substances in the pharmacy and throughout the system.
- Nursing WorkStation (NWS) - A companion application to the MedSelect Dispensing Terminal, comprised of software and hardware, used to track patient dispenses, and work with reports, discrepancies, and wastes.

For information on working with MedSelect configuration and replenishment, see the *MedSelect SupplySelect Centrack Restocker Guide*.

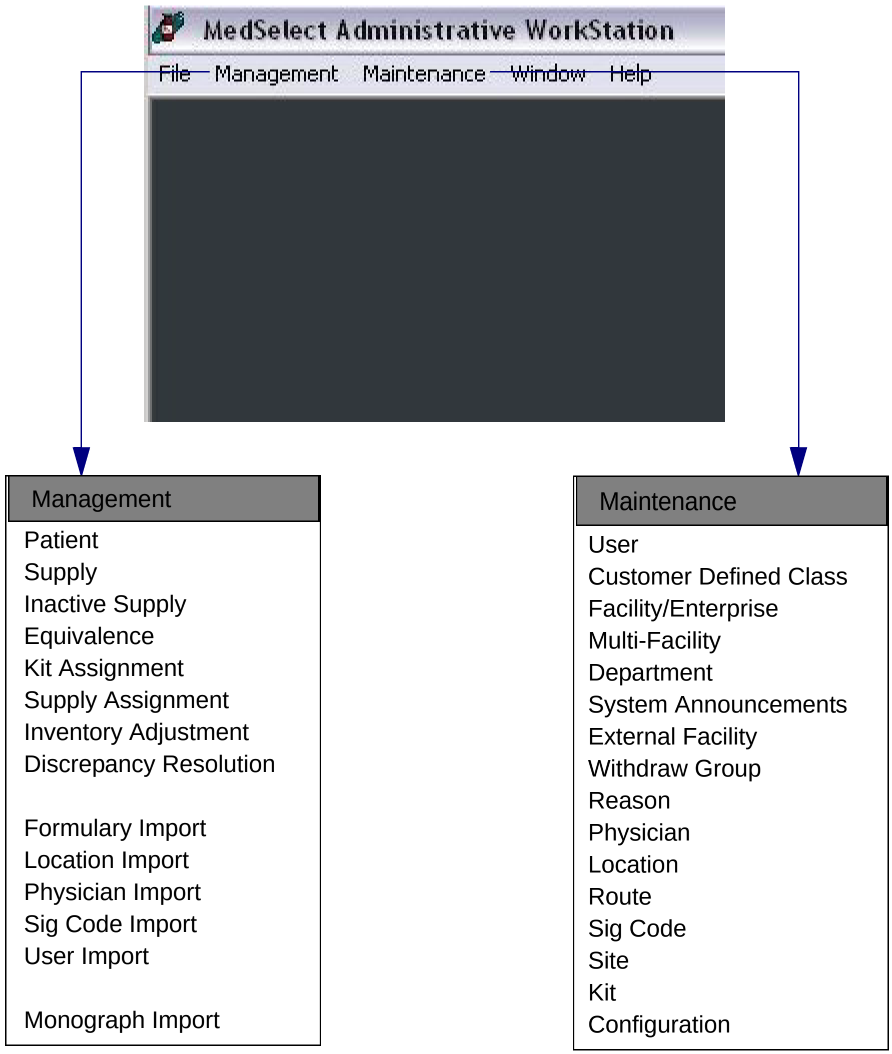
If you have already used AWS MedSelect software, you probably know the general layout of windows, how buttons work, and system basics, such as how to navigate the system and enter data. If you haven't used MedSelect software, review this manual and the *MedSelect Display Terminal User Guide* you received with the system; these manuals have information about the system that you need to know, regardless of which modules you use.

If you are reading this guide, you are likely an administrator or other authorized user of the MedSelect AWS system. That means you are responsible for managing and maintaining the system (completely or partially) that controls dispensing and returning/retrieving supplies and restocking modules.

Administrators, or super users, control user accounts and assign activity privileges to each user. This guide will provide all the information you need to perform MedSelect AWS functions.

Use this manual to work with the options on the MedSelect AWS menus as they appear on the main window, which opens after you log in (refer to the following graphic).

For more information on the Management and Maintenance menus, refer to The AWS Menus on page 10.



AWS Management and Maintenance menus

This software guide is one of several produced by ARxIUM and represents just one type of documentation. The following table presents other manuals that you may receive with your MedSelect system, depending on your setup.

Manual	Description	Intended Audience
MedSelect Display Terminal User Guide	This manual is designed around the tasks performed using the display terminal (DT) at a nursing station. The DT monitors medication and/or supply inventory, allows dispensing of medications/supplies, and permits the user to waste or return unused items.	System administrators, super users, pharmacy administrators, pharmacists, nurses
MedSelect SupplySelect Centrack Restocker Guide	Use this guide to restock supplies in MedSelect, SupplySelect, and Centrack cabinets. In this guide you will find component descriptions, and instructions on configuring modules to accommodate supplies of varying types and sizes. Also, you will learn how to load the modules with supplies. There is no set order in which this guide must be used; each dispensing module has its own chapter.	System administrators, super users, pharmacy techs, nurses
Nursing WorkStation User Guide	Use this guide when using the Nursing WorkStation (NWS).	Nursing staff
Centrack User Guide	Use this guide with your Centrack software.	System administrators, super users, pharmacy techs

Manual	Description	Intended Audience
MedSelect SupplySelect Dispensing Station Installation Guide	This manual provides procedures, guidelines, and checklists for installing dispensing station components. This includes unpacking and verifying receipt of components, staging components (initial setup), installing components in a final location, connecting components, testing components, and cleaning up after installation.	Site personnel, pharmacy administrators
MedSelect Examiner User Guide	This manual provides instructions for using and modifying the reports features of your MedSelect software. You can schedule auto-reports to run on a daily, weekly or monthly basis.	System administrators, super users, pharmacy techs, nurses

In addition to manuals, online help is also available. Whatever type of information you're looking for - in-depth explanations (user guides), or help on a particular topic (help text) - information is available in a way you can use it.

Of course, if you have suggestions about how we can improve the information we provide to you, we welcome your comments. Call or e-mail your systems implementation specialist or our Customer Support Department.

Notes:

System Overview

The Administrative WorkStation, or AWS, is a Windows-style software application that runs in a Windows environment and is on the same network as the MedSelect System. Use the AWS to perform a variety of administrative tasks, including:

- Set up your MedOrders and Centrack systems
- Define the characteristics of the supplies in your database
- Assign supplies to MedSelect System inventory devices
- Create system user accounts
- Enter, monitor, and retrieve patient data
- Manage discrepancies

The AWS Menus

There are two main AWS menus: Maintenance and Management. You will use the options on these menus to perform most AWS functions. Other menus are also available to work with the corresponding browsers.

The Maintenance Menu

The Maintenance menu includes those functions that are normally configured during system setup, and change little over time. User accounts, customer defined classes, facility and department setup, and system configuration are all maintained through this menu.

The Maintenance menu is explained here first because the system must be set up before you can use it.

Maintenance

- User
- Customer Defined Class
- Facility/Enterprise
- Multi-Facility
- Department
- System Announcements
- External Facility
- Withdraw Group
- Reason
- Physician
- Location
- Route
- Sig Code
- Site
- Kit
- Configuration

The Management Menu

The Management menu includes those functions you typically perform on a daily basis, and also includes importing options. You can manage patient accounts, control supplies, resolve discrepancies, and import files using the Management menu.

Management

- Patient
- Supply
- Inactive Supply
- Equivalence
- Kit Assignment
- Supply Assignment
- Inventory Adjustment
- Discrepancy Resolution

- Formulary Import
- Location Import
- Physician Import
- Sig Code Import
- User Import

- Monograph Import

The Data Menu

Use the Data menu to perform a variety of functions, depending on the browser you are viewing. For example, when viewing the Patient Browser, you can add or delete a patient, close or undo close a visit, locate a patient without an open visit, sort, filter, or find.

Use the Data menu on the Supply Browser to add or delete a supply, configure a scanner, delete barcodes, sort, filter, or find.

Use the Data menu on the Discrepancy Resolution Browser to show previous accesses, set the number of previous accesses, set the date range, sort, filter, or find.

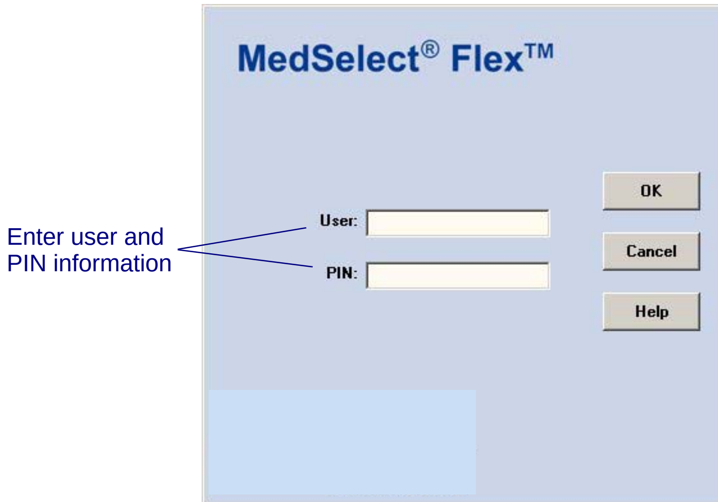
Pharmacy Check Menu

Use the Pharmacy Check menu to generate approval codes for items that require a pharmacy check. The pharmacy check feature allows users to dispense a supply via a preapproved pharmacy approval code for a patient. This occurs, for example, when a physician verbally approves an order for a controlled medication, but the physical prescription has not yet arrived. Items that require a pharmacy check approval code are those marked with a pharmacy check icon.

Setting Up a System Administrator Login

When your system is installed, you or your ARxIUM implementation specialist will set up a system administrator login. Follow the steps below.

1. Type “admin” as the user ID in the login window; then press the Tab key.
2. Type “4321” as the PIN.



3. Click ***OK***.
4. Choose User on the Maintenance menu to open the User Browser. Refer to Working with the User Browser on page 72.
5. Add yourself as a system administrator and select all the user rights available. Refer to Adding a User on page 73.
6. Delete or disable the default administrator account after creating your new system administrator account. Refer to Deleting a User on page 89 and Temporarily Disabling a User on page 78.
7. After setting up your system administrator account, you can set up all the AWS user accounts, following the instructions in Adding a User on page 73.

Logging On for the First Time

The first time a user logs on to the AWS, s/he must follow these steps.

1. On the AWS Login window, type your user name in the user text box.
2. Type 9999 as the PIN.
3. Follow the prompts to create a new PIN. Use 4-8 alphanumeric (not case-sensitive) characters.
4. Click ***OK***.

Common Functions

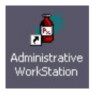
Common functions are those that you perform frequently throughout the software application. This chapter provides you with the information you need to perform these common functions and covers the following topics:

- Starting the Application and Logging On
- Changing a Personal Identification Number (PIN)
- Understanding and Using the Software
- Sorting, Filtering, and Searching for Information

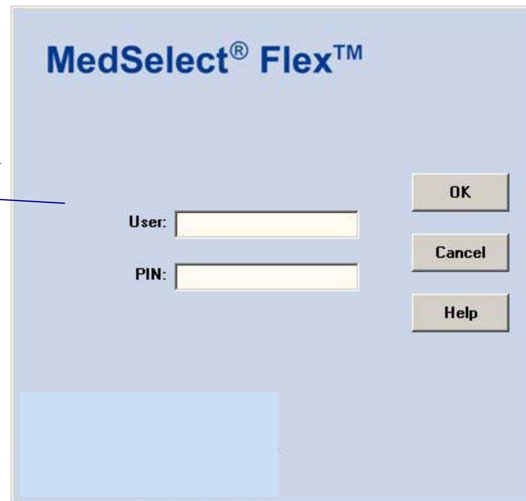
Starting the Application and Logging On

Prior to working with the AWS, you must log in. Follow these steps:

1. Click the AWS desktop shortcut; the Login window opens.



Click the desktop shortcut to see this window.

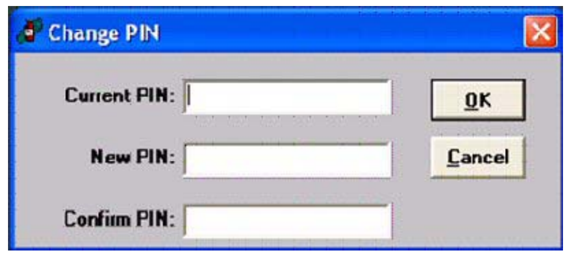


2. Type your user name and PIN.
3. Click ***OK***. The MedSelect Administrative WorkStation window opens, and you are now ready to work within AWS.

Changing a Personal Identification Number (PIN)

Depending on how your system is set up, the system may notify you when it’s time to change your PIN. You may, however, change your PIN at any time. Follow these steps to change your PIN.

1. Select File on the MedSelect Administrative WorkStation main window.
2. Select Change PIN. The Change PIN window opens.



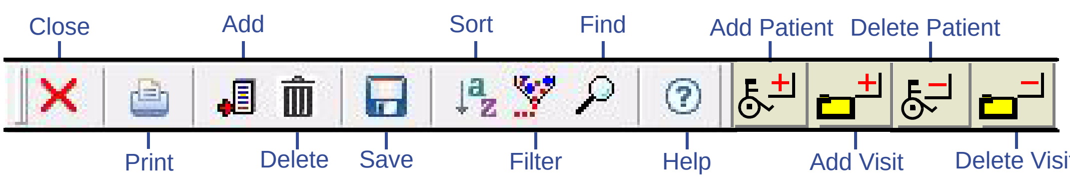
3. Type your current PIN in the Current PIN text box.
4. Type the new PIN in the New PIN text box.
5. Type the new PIN again in the Confirm PIN text box.
6. Click ***OK***. The new PIN is now in effect.

Understanding and Using the Software

This chapter explains how you navigate through the system and use the functions you need to perform tasks on browsers and windows.

Using the Toolbar

Each browser/window has a toolbar that allows you to access the File, Management, Maintenance or Window menu options. Depending on the window, the toolbar will contain icons that allow you to perform required actions. Refer to the toolbar graphic below with descriptions:



- Close - Closes the open window
- Print - Prints the contents of the current window
- Add - Adds a new item to the list or window being viewed
- Delete - Deletes a selected item from the list viewed
- Save - Saves all changes to the database
- Sort - Sorts information on any browser being viewed. A custom sort can be built and saved for a respective list or browser. Column headers sort as well
- Filter - Filters information on any browser being viewed

- Find - Finds information on any browser being viewed and allows a user to define a keyboard search field, which may be saved for the respective list or browser
- Help - Activates the online help
- Add Patient - Adds a patient (on the Patient Browser or Detail window)
- Add Visit - Adds a patient visit (on the Patient Browser or Detail window)
- Delete Patient - Deletes a patient (on the Patient Browser or Detail window)
- Delete Visit - Deletes a visit (on the Patient Browser or Detail window)

Removing/Repositioning the Toolbar

Right-click an icon to open the following list of options:

- Clear the check next to Sheetbar to remove the toolbar. The toolbar is removed until the next time you open a new window (by opening a browser, detail, etc.).
- Select Left, Top, Right, Bottom to reposition the toolbar.
- Select Floating to make the toolbar become its own window.

Viewing Icon Names

Place the pointer on an icon to display the name, or right-click an icon and select Show Text to make the icon smaller with the name under it.

Using Drop-down Boxes

A drop-down box is a list of items that populates a data field. Drop-down boxes are indicated by a button with an arrow pointing downward. Click this button to open the box. Click one of the items to insert it into the field.

Drop-down boxes contain information that is maintained elsewhere within the system. For example, use Physician Maintenance to enter all physician names. These names are provided in a drop-down box in the Admitting Physician field on the Patient Detail window.

Working with Browser Windows

Browsers display a list of names or items, used for performing an action or retrieving more information on an item in the list. Browsers such as the Patient Browser, Supply Browser and User Browser contain abbreviated information on patients, supplies, and users, respectively. Double-click an item to open a detailed window that shows more information about the chosen item. You can add, edit, or delete information directly on some browsers. Others require you to open a detail window to perform these functions.

Working with Detail Windows

A detail window displays details about a specific item or person. For example, a patient detail window contains details about the patient, such as gender, birthdate, etc.

Typing Information

When adding or editing information, you must populate required fields (indicated by boldface type) on a browser or detail window. You may leave optional fields blank, but you can populate them to add helpful information.

Editing Fields

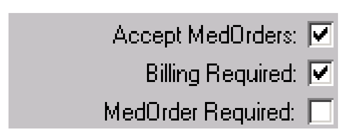
You can edit any field with a white background on a detail window. Fields with a non-white background cannot be edited. Non-editable fields usually contain information that the system enters automatically; this information appears for information purposes only.

Selecting an Item

You can select a line item on many of the AWS windows, and then perform a function on the selected line item, in two ways. First, you can select an item, then click a button (such as Details). Second, you can double-click the item. For example, select a user row from the User browser, then click Details to open the User Detail window or double-click the user row to open the User Detail window.

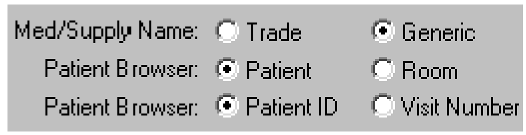
Selecting Check Boxes

Click the box to select an option. Click again to clear the option. Refer to the example below:



Selecting Option Buttons

Click a button next to an option you want to choose. Click the option again to clear. Refer to the example below:



Toggling Among Open Windows in the Application

You may need to have several windows, such as a Patient Browser, Patient Detail, and Account Adjustment open at the same time. You can minimize one window to view others behind it, or use Ctrl+Tab on the keyboard to move among windows. Press and hold the Ctrl key while repeatedly pressing the Tab key to move from window to window.

Select the Window menu option in the toolbar to view a list of open windows. Click on one of the window names to bring that window to the foreground. Use Alt+Tab on the keyboard to move from application to application if you need to bring up other applications (such as a word processor or spreadsheet) that are running on your computer behind the AWS.

Viewing Online Help

AWS includes context sensitive online help. When you open help, the topic that appears contains specific instructions on the AWS window you are using.

Click on the Help icon in the menu toolbar to open Help (see Using the Toolbar on page 18).

Sorting, Filtering, and Searching for Information

You can access and display browser/window information any of three ways: by sorting, filtering, or searching (Smart Find). The process you use to perform any of these functions is the same for any browser/window where the Sort, Filter, or Smart Find icons are present.

Click a Sort, Filter or Smart Find icon (see the graphic below) to open a corresponding window.


Sort


Filter


Smart Find

Sorting Information

You can sort information on browsers/windows by clicking any of the column headings. Further, you can organize sorts by any order and combination of the headings.

Click the Sort icon in the browser/window toolbar to open the Sort window.

Note: The current sort order of the browser/window displays if a sort has been previously run and saved.

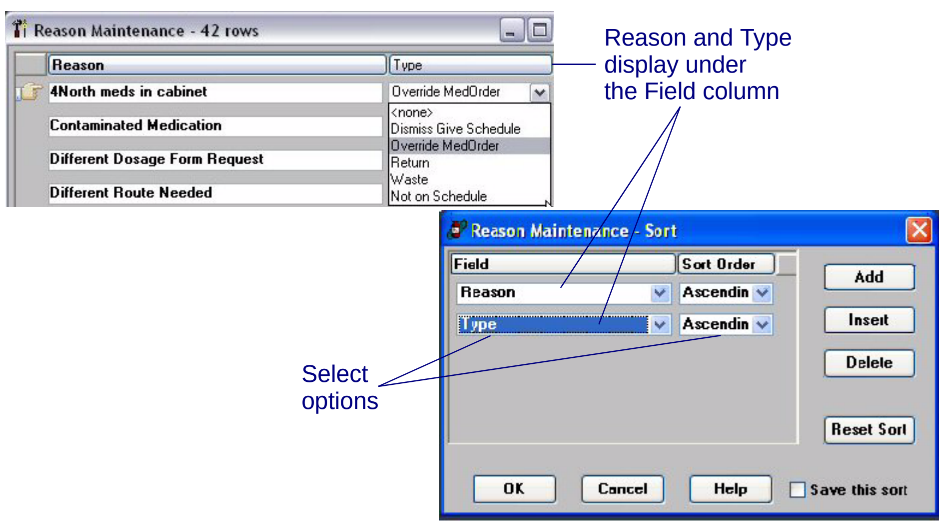
Follow these steps to create a new sort:

1. Locate the default field, which is the first heading name directly under the browser/window title; the default field appears in the first line under the Field column.
2. Select a field in the drop-down box to specify a different field from the default field.

3. Select Ascending or Descending in the Sort Order column to specify an ascending or descending order.
4. Click ***Add*** to select another field, if available, to use for a secondary sort. A blank row opens for you to define the next field. Use as many available fields as you like to further define the sort.
5. Click ***OK***. The sort appears.
6. Click ***Cancel*** to close without sorting.

Use this example to sort the Reason Maintenance window first by reason, then by type.

1. Under the Maintenance menu, select Reason to open the Reason window.
2. Click Sort in the toolbar of the Reason Maintenance window to open the Sort window.



Note that Reason is in the Field column by default.

3. Select Ascending in the Sort Order field for ascending order.
4. Click ***Add***.
5. Select Type in the drop-down box of the Field column of the new line.
6. Select Ascending in the Sort Order field for ascending order.
7. Click ***OK*** to perform the sort or ***Cancel*** to close without sorting.

To delete a sort:

1. Select a row on the Sort window.
2. Click ***Delete*** to remove a field and sort order.
3. Click ***OK***.

To save a sort for the next time you open the window:

1. Select the Save this sort check box.
2. Click ***OK***.

To reset the sort order:

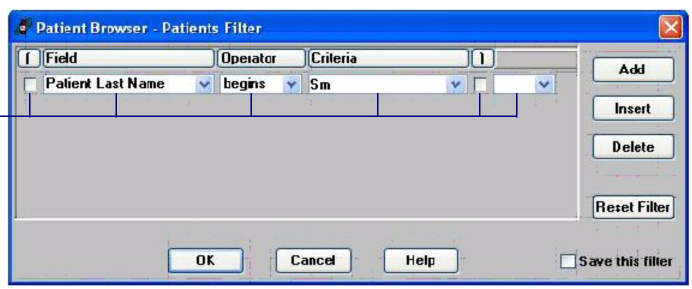
Click ***Reset Sort*** to set the sort order to the default settings shipped with the system.

Filtering Information

You can filter information in the browser/window to show only information that meets your criteria. Use the following example to filter for all users who have a disabled login. Follow these steps:

1. On the Management menu, select Patient to open the Patient Browser.
2. Click Filter in the toolbar.

Select options



3. Select Disabled in the drop-down box in the Field column.
4. Select = in the drop-down box in the Operator column.

5. Type Y in the Criteria field (the = search is case sensitive, so you must type a capital Y). You should have a filter that reads: (Disabled = Y).
6. Click ***OK***. The browser displays only those records that meet the search criteria.

Use the following example to filter for a patient's last name. Follow these steps:

1. On the Management menu, select Patient to open the browser.
2. Click Filter in the toolbar.
3. Select Patient Last Name in the drop-down box in the Field column.
4. Select Begins or Contains in the drop-down box in the Operator column.
5. Enter the beginning letters of the last name (Sm) for the Begins option or the entire last name (Smith) for the Contains option.
6. Click ***OK***. The browser displays only those records that meet the search criteria.

Note: While filtering, you can search for information that is either blank or not blank. To specify a search for a blank field, specify = in the Operator field, and do not put any data in the Value field. To search for any information except a blank field, specify < > in the Operator field, and do not put any data in the Value field.

To add a new filter:

1. Click the ***Add*** icon.
2. Select a new field, operator, and an and/or specification from the drop-down boxes and enter a criteria. Select brackets if required.

3. Click ***OK*** to run the filter.
4. Click ***Cancel*** to close without running.

Note: The And/Or field defaults to And if lines are added before entering data, but it can be can changed to Or.

To delete a filter:

1. Select a row.
2. Click ***Delete*** to remove the expression.
3. Click ***OK***.

To save a filter for the next time you open the window:

1. Select the Save this sort check box.
2. Click ***OK***.

To reset the filter:

1. Click ***Reset Filter*** to display its original information.
2. Click ***OK***.

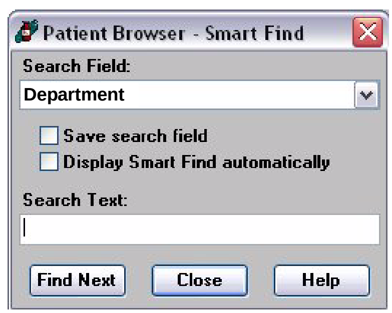
Filter Field Definitions

Heading	Definition	Options	Result
(	Denotes the beginning of a sequence of options.	Selected Not selected	Indicates the start of a group of search criteria.
Field	Contains a drop-down box of all the fields of the browser being used.	Select a field	Field must match criteria.
Operator	The function to perform when searching.	= <> < > <= >= begins contains ends	- Finds those items exactly equal to the criteria. The equals search is case-sensitive. - Finds items not equal to the criteria. - Finds items less than the criteria. - Finds items greater than the criteria. - Finds items less than or equal to the criteria. - Finds items greater than or equal to the criteria. - Finds items that begin with the text. - Finds items that contain the text. - Finds items that end with the text.
Criteria	The value to look for.	Number Text Another field	Criteria is used to filter the browser list, depending on the operator specified. You cannot search for double quotes ("). You may search for single quotes (').
)	Denotes the end of a group of search criteria.	Selected Not selected	Indicates the start of a group of search criteria.
And/Or	Forms groups of search criteria.	And Or Blank	- All groups must match. - One or more groups must match. - End of filter criteria.

Searching for Information Using Smart Find

You can search for browser/window information using the Smart Find function. Click the Smart Find icon on a browser/window to open the Smart Find window, then follow these steps.

1. Choose a search item from the drop-down list.
2. If desired, check Save search field to save the changed default keyboard search field of the window.
3. If desired, check Display Smart Find automatically to open this window automatically. Displaying this window allows keyboard searching to be done on non-browser windows.
4. Type the text you are searching for in the Search Text box.



5. Click ***Find Next*** to find the next row that satisfies the search text.
6. Click ***Close*** to close the window.

System Announcements

Use the System Announcements option on the Maintenance menu to work with system messages. From the AWS you can create, edit, and delete system messages as well as perform other system-wide message functions, if you are assigned the announcements access right as part of your user profile. (See page 72 for more information on working with user profiles.) This chapter covers these topics:

- Adding a System Announcement
- Editing a System Announcement
- Deleting a System Announcement

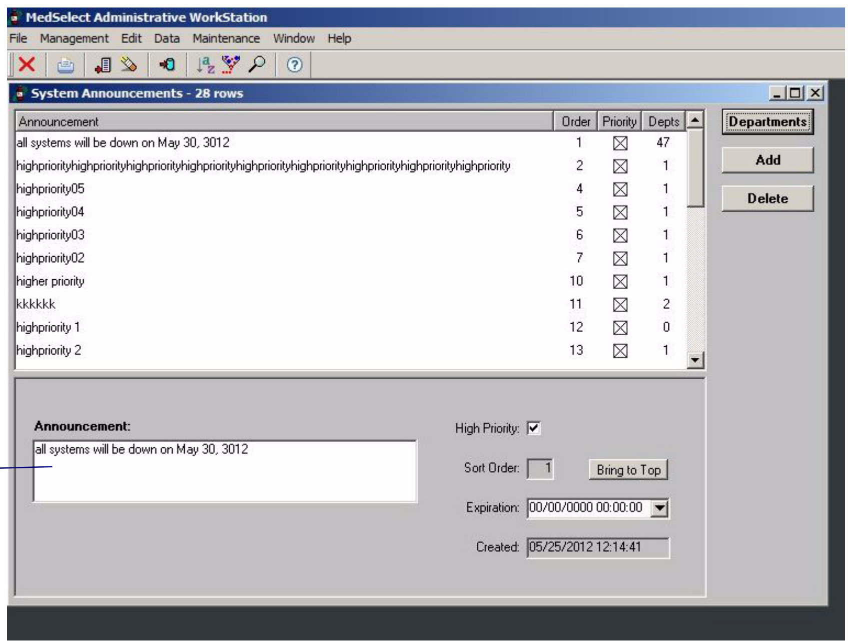
Adding a System Announcement

You may want to send a message to be displayed on DTs within your system. You can choose to display the message on DTs in all departments, or only on DTs in selected departments.

Follow the steps below to create a new system message.

1. Choose System Announcements on the Maintenance menu. The System Announcements window appears.

Type your announcement here.



2. Click ***Add***.
3. Type the announcement in the Announcement text field, as you want it to appear.

4. Check the High Priority check box if you want this announcement to appear under a HIGH PRIORITY heading and to be preceded by **.
5. Click ***Bring to Top*** if you want this announcement to appear at the top of the list.
6. Set an expiration date for the announcement, using the drop-down list to choose a date format. The announcement will expire and automatically disappear from the system messages at the time and date you specify.
7. Click ***Departments*** to view a list of available departments.
8. Choose the departments for which you want the DTs to display the announcement, or choose all departments if you want the announcement to be available for viewing at all DTs.
9. Click the Save icon. The message moves to the large announcement portion at the top of the System Announcements window. To the right of the message you will see the message order, priority status, and the number of departments at which the message is viewable.
10. Close the System Announcements window.

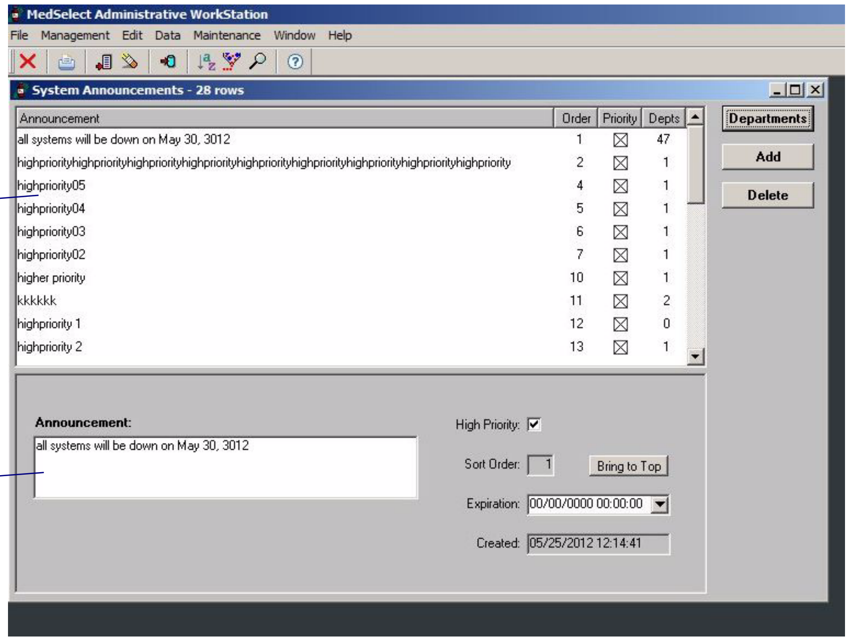
Editing a System Announcement

At times you may need to modify an announcement that you have created. Follow these steps to edit a message.

1. Choose the message you want to modify from the messages listed in the upper left side of the System Announcements window.

Choose the message you want to modify

The message text appears here



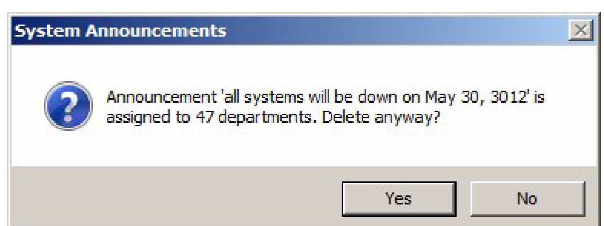
2. When the message text appears in the Announcement text field, make any necessary changes.
3. Select the High Priority check box if you want this announcement to appear under a HIGH PRIORITY heading and to be preceded by **.
4. Click ***Bring to Top*** if you want this announcement to appear at the top of the list.
5. Set an expiration date for the announcement, using the drop-down list to choose a date format. The announcement will expire and automatically disappear from the system messages at the time and date you specify.

6. Click ***Departments*** to view a list of available departments.
7. Choose the departments for which you want the DTs to display the announcement, or choose all departments if you want the announcement to be available for viewing at all DTs.
8. Click the Save icon. The message moves to the large announcement portion at the top of the System Announcements window. To the right of the message you will see the message order, priority status, and the number of departments at which the message is viewable.

Deleting a System Announcement

Follow the steps below if you want to delete an announcement from the System Announcements window.

1. On the System Announcements window, choose the announcement you want to delete.
2. If the message has been set up to be viewed by multiple departments, a window like that shown in the following image appears.



3. Click ***Yes*** if you want to delete the message; or click ***No*** if you want to cancel the deletion.

Notes:

Facilities and Departments

A facility (or enterprise), such as a hospital, is the single entity that incorporates all departments, locations (rooms), and devices within your system. The facility/enterprise is set up during system implementation, and will appear when you select Facility on the Maintenance menu.

If your setup includes multiple facilities, you will work with the Multi-Facility item on the Maintenance menu. Refer to page 45.

Departments such as Surgery, Nursery, ICU, etc. include locations, which consist of all areas that must be monitored or tracked by the MedSelect system. These locations could be operating rooms, patient rooms, nursing stations, storage shelves, etc.

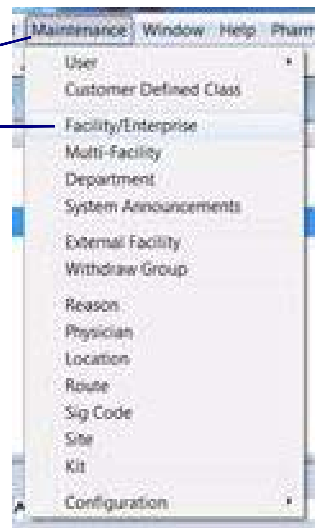
Note: Settings in the facility window are global and affect all departments and display terminals throughout the facility.

Working with Facilities

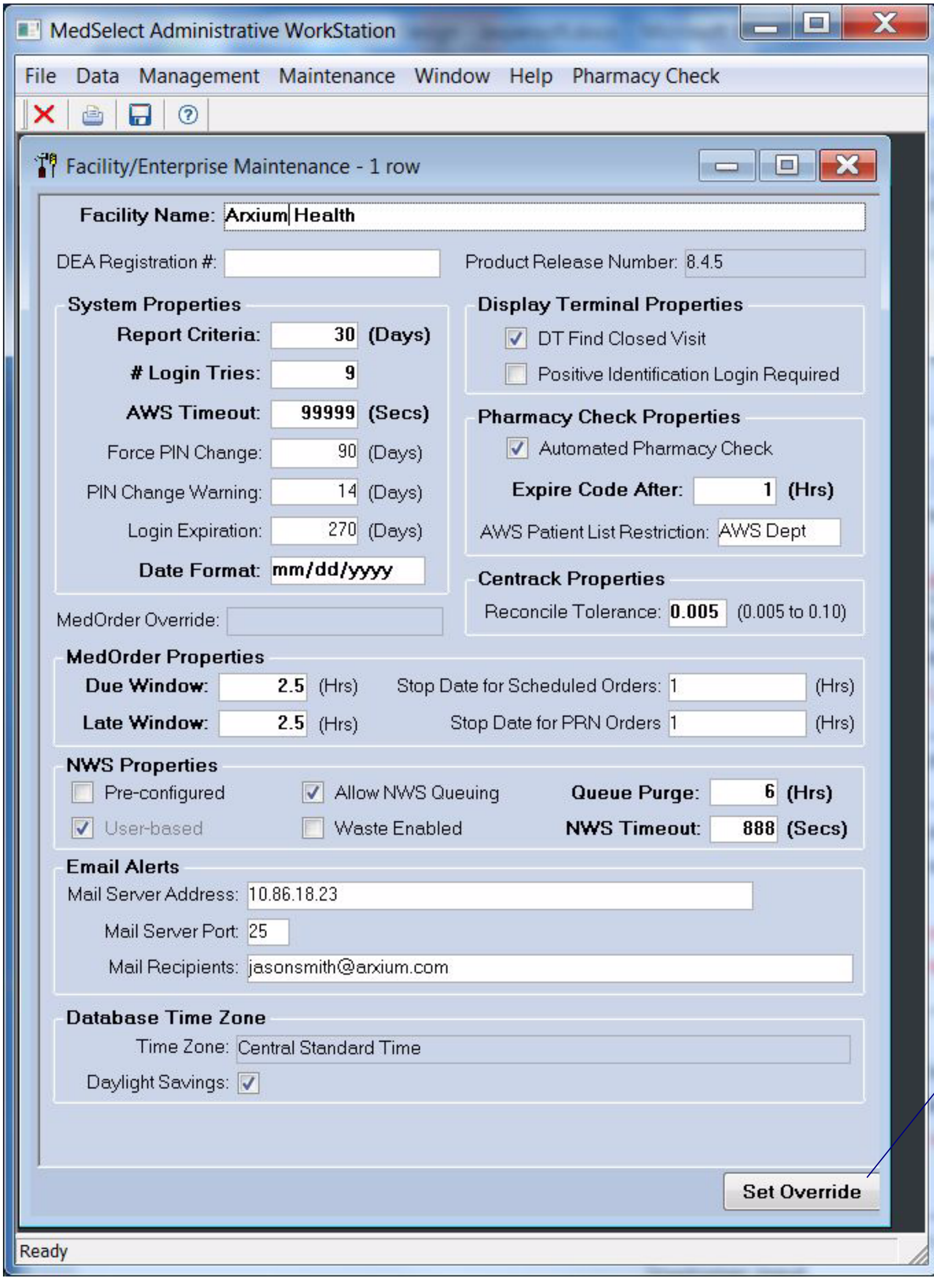
You must have administrate rights to access Facility Maintenance.

Begin working with facilities by selecting Facility/ Enterprise from the Maintenance menu at the top of the AWS main window.

Choose Maintenance, then choose Facility/Enterprise



The Facility Maintenance window appears, as shown in the following figure.



Set Override overrides MedOrders and allows dispensing orders from a picklist

Clear Override returns to MedOrders functionality

Editing a Facility

Follow these steps to edit the facility fields:

1. Select Facility on the Maintenance menu shown on page 38 to open the Facility Maintenance window.
2. Edit the fields on the Facility Maintenance window as necessary; bold fields require data. Refer to the table which follows for details on each of the Facility Maintenance fields.
3. Click the Save icon.

Refer to the following table for an explanation of each of the facility maintenance fields and options.

Facility Maintenance Field Definitions

Review the information in the table below when you add or edit facilities.

Field	Explanation
Facility Name	The facility name (60 characters maximum).
DEA Registration #	Your facility's DEA registration number.
Product Release Number	Provides the software version identification.
System Properties	
Report Criteria	Enter the number of days of information retrieved on the AWS Discrepancy Report. Refer to Setting the Date Range for Discrepancies on page 343. (Suggestion: one day).

Field	Explanation
# Login Tries	Enter the number of times a user can attempt to log into a DT or AWS before the account is disabled.
AWS Timeout	Enter the length of time all AWS computers may sit idle before logging out the user (Suggestion: 300 seconds).
Force PIN Change	Enter the number of days after which the system will force a user to change the PIN (Suggestion: 90 days). Users are prompted at the DT to change their PIN.
PIN Change Warning	Specify the number of days prior to PIN expiration you want to warn users of the impending expiration.
Login Expiration	Enter the number of days after which a login expires (Suggestion: 120 days). The administrator gives the user access.
Date Format	Choose either mm/dd/yyyy (the default) or dd/mm/yyyy
Display Terminal Properties	
DT Find Closed Visit	Check this box to allow a user to find a patient at that DT when the patient has a closed visit.
Positive Identification Login Required	Check this box to require an ID badge, swipe card or proximity card to log into a DT. A cleared box requires only entering the user name and PIN to log in to the DT.
Pharmacy Check Properties	
Automated Pharmacy Check	Check this option to use the pharmacy check feature. When checked, a Pharmacy Check menu appears at the top of the main AWS window.
Expire Code After x Hours	Type a number (5 digit maximum) to represent the number of hours after which a pharmacy check approval code expires. The default value is 24 hours.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>AWS Patient List Restriction</td><td>Choose one of the following options:
All Facilities - The Pharmacy Check patient list shows all patients within the system
AWS Facility - The Pharmacy Check patient list shows only patients of the AWS facility. This is effective for multi-facility users whose systems have separate facilities set up within the multi-facility setup feature
AWS Dept - The Pharmacy Check patient list shows only patients of the AWS department. This is the default setting.</td></tr>
<tr><td colspan="2">Centrack Properties</td></tr>
<tr><td>Reconcile Tolerance</td><td>Use this setting to specify automatic reconciliation of Centrack in-transit activities. When an in-transit transaction occurs with a partial dispense (for example, decimal quantities), if the quantities do not reconcile to zero when reconciling, the system can reconcile the resulting quantities when they are within the tolerance specified here. Acceptable values are between 0.005 and 0.1.</td></tr>
<tr><td colspan="2">MedOrder Properties</td></tr>
<tr><td>MedOrder Override</td><td>Information in this field corresponds to the use of the Set Override/Clear Override button.</td></tr>
<tr><td>Due Window*</td><td>Enter the number of hours before and after the current time to display give times. Give times after the current time within the due window display in green.</td></tr>
<tr><td>Late Window*</td><td>Enter the number of hours the order will be displayed at the DT after the give time. When a medication is past due, it displays in pink. The late window value must be greater than the due window.</td></tr>
<tr><td>Stop Date for Scheduled Orders</td><td>A scheduled order may be dispensed past the order stop date based on the setting in this field.</td></tr>
<tr><td>Stop Date for PRN Orders</td><td>A PRN order may be dispensed past the order stop date based on the setting in this field.</td></tr>
</table>

Field	Explanation
NWS Properties	
Pre-configured	Checking this check box means that all NWS clients are pre-defined in client configuration, and they are not part of a virtual desktop network. If your system includes a virtual desktop environment, uncheck this check box.
User-based	If your system includes a pre-configured NWS setup, NWS will be predefined to support a single department, which is set in client configuration. Check this box to force all NWS applications to prompt for the department when the user logs in. Departments assigned to the user then display.
Allow NWS Queuing	This option is enabled only when the Pre-configured check box is not checked. Checking this option enables queuing for all NWS applications on a virtual desktop network.
Waste Enabled	This option is enabled only when the Pre-configured check box is not checked. Check this option to enable remote wasting in NWS applications on a virtual desktop network.
Queue Purge	This option is enabled only when the Pre-configured check box is not checked. This option indicates how long, queued MedOrders are available at the DT before they are purged. Twelve hours is the default setting.
NWS Timeout	This option is enabled only when the Pre-configured check box is not checked, and represents the amount of time (in seconds) after which the NWS will time out if there is no activity.
Email Alerts	
Mail Server Address	Enter the mail server address.
Mail Server Port	Enter the mail server port.

Field	Explanation
Mail Recipients	Enter the mail recipients. Separate multiple email addresses with a semicolon. Department email addresses take priority over facility addresses. An email is sent to the addressee if there is a stock out.
Set Override	In the event of an interface failure at the facility or if your pharmacy does not operate on a 24/7 basis, you can choose to override the MedOrders function, allowing DT users to dispense orders from a picklist. To do this, perform the following. Click Set Override on the Facility Maintenance window. The button changes to Clear Override. Click the Save icon. Note: If you attempt to access MedOrders when Set Override is activated, a window similar to the one below displays at the DT with the date and time it was set.  DT users can then dispense orders from a picklist. When the interface service returns to normal, you can return the DTs to normal usage, by clicking Clear Override on the Facility Maintenance window, and then clicking Save. This returns the DT operation to MedOrder usage and automatic tracking of orders.

Field	Explanation
Database Time Zone	
Time Zone	This read-only field displays the default database time zone setting.
Daylight Savings (check box)	This read-only check box indicates whether the time zone is affected by Daylight Savings time.

**Note: The total length of time the order is on the screen is the Due Window + Late Window.*

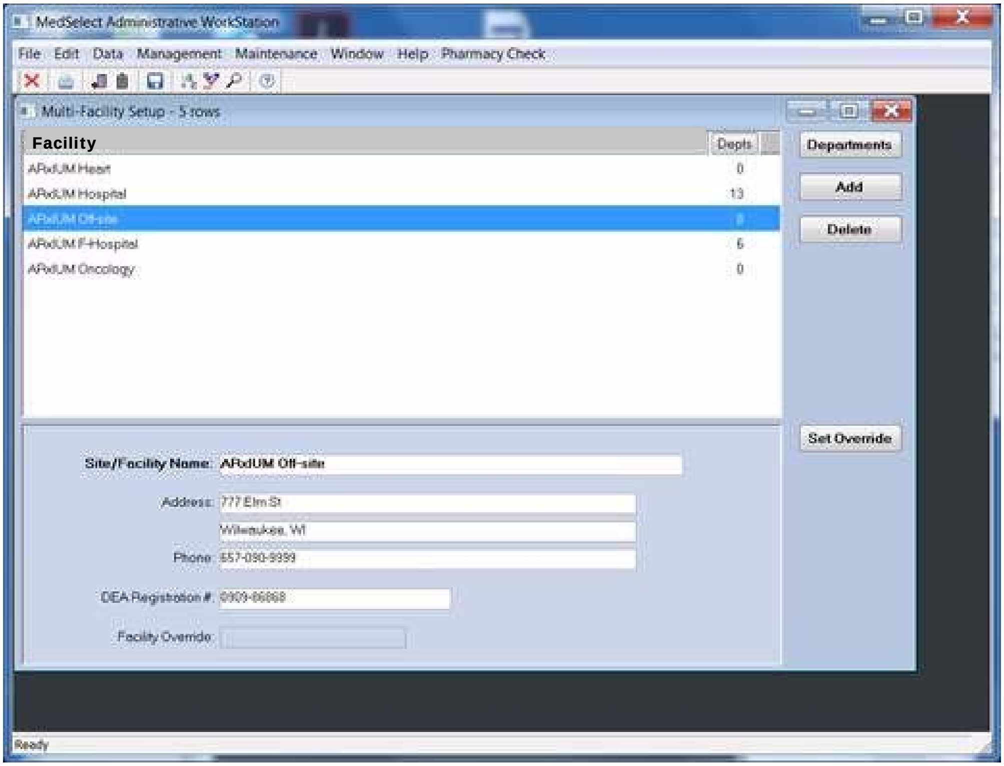
Working with Multi-Facilities

A setup may be composed of multiple facilities, such as a hospital network or a chain of long-term care facilities. You can view and work with these facilities using the multi-facility feature. An advantage to this feature is the ability to search for a medication or supply at other DTs. Similarly, a user can search for a patient at other DTs. Also, you can use the Set Override feature to override MedOrders within a specific facility.

At the time your system is installed or upgraded, your ARxIUM implementation specialist will assist you to set up the multi-facility feature.

Note:
You must have administrate rights to access the Multi-Facility option on the Maintenance menu.

Begin by clicking Multi-Facility on the Maintenance menu. A window like this appears.



At the bottom of the Multi-Facility Setup window you see the name, address, and phone number of the selected facility. If you plan to print labels, this is the information that appears on your labels.

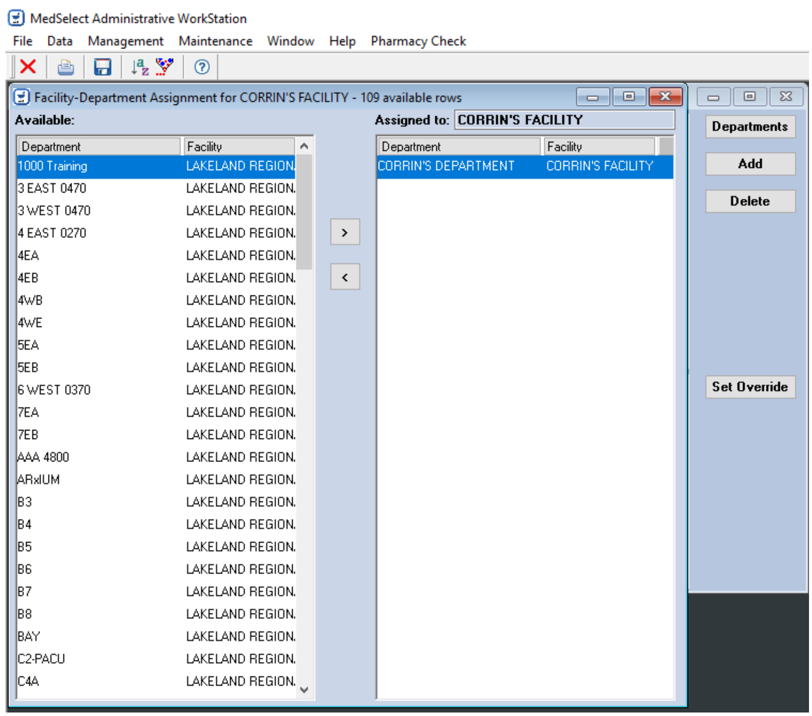
If you have a single facility, when you look at the Multi-Facility window, you will see just that facility. All departments will be assigned to that facility.

If your setup includes two hospitals, for example, the facility/enterprise and the multi-facility information are initially the same. However, from the Multi-

Facility window you can easily add a facility and assign departments to the appropriate facility.

Assigning Departments

On the Multi-Facility window, choose a facility on the list, then click ***Departments***. On the window that appears, you can move a department to or from the selected facility. Departments can only be assigned to one of the facilities on the multi-facility list.



Multi-Facility Setup - Adding a Facility

On the Multi-Facility window, click *Add*; the bottom of the Multii-Facility Setup window clears, allowing you to add information for the facility to be added.

Deleting a Facility

On the Multi-Facility window, choose a facility on the list, then click ***Delete*** to delete it from the list. Confirm or cancel the deletion by choosing either Y or N on the pop-up window that appears.

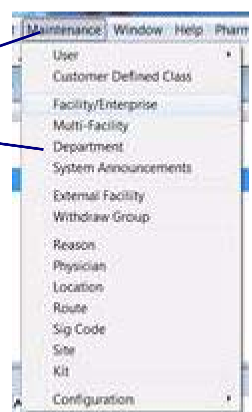
Working with DT Departments

DT Departments are a collection of locations and display terminals (DTs). You may set global attributes for a department which will affect all the DTs within the department.

You must have the administrate right to access Department Maintenance.

Begin working with departments by choosing Department on the Maintenance menu to open the DT Department Maintenance window.

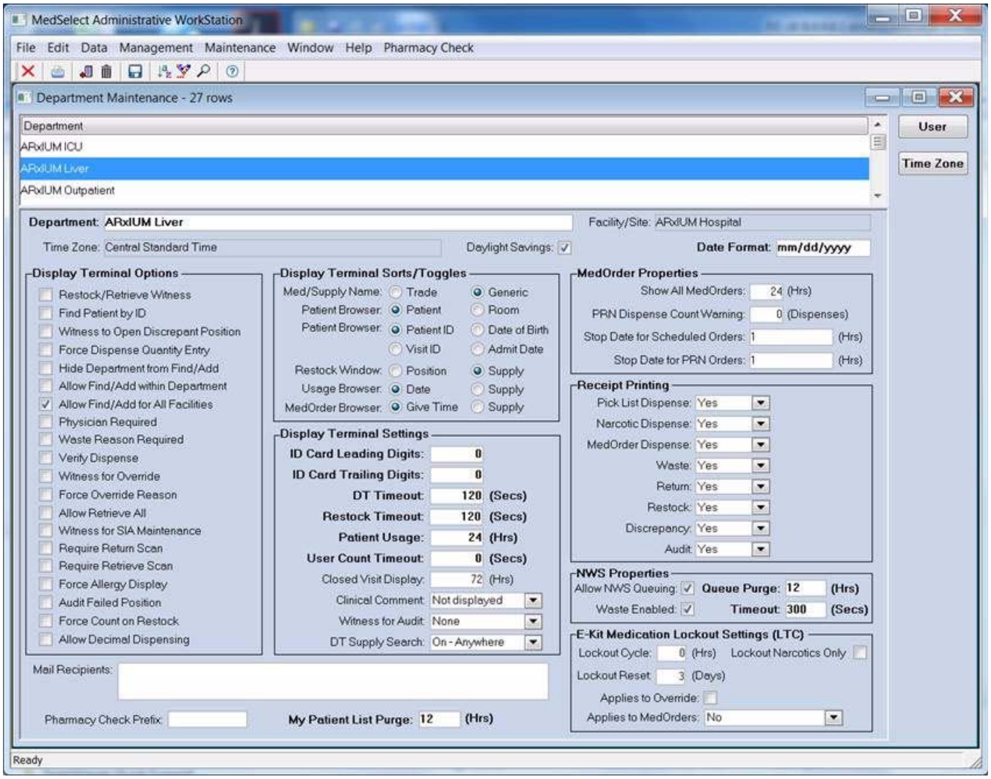
Choose Maintenance, then choose Department



A window similar to the one shown on page 49 opens if the first department is for a DT (or, you can chose DT department from the list).

This type of window opens either when a DT department is first on the list, or when you choose a DT department.

For explanations of the fields on this window, refer to Department Maintenance Field Definitions on page 53.



Department Maintenance window

Creating a DT Department

Follow the steps below to create a DT department.

1. Select Department on the Maintenance menu to open the Department Maintenance window.
2. Click the Add icon on the toolbar of the Department Maintenance window to clear the Department field.
3. Enter the name of the new department.
4. Complete each field and option as required, referring to the table of field definitions on page 53. Bold fields require information.
5. Click the Save icon.

After you create a DT department, you can assign users to departments. (See Assigning Users to DT Departments on page 51.)

Editing a DT Department

Follow the steps below to edit a DT department.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.
2. Select a department from the Department list at the top of the Department Maintenance window.

3. Edit the fields as necessary, referring to the table of field definitions that begins on page 53. Bold fields require information.
4. Click the Save icon.

   After you edit a department, you can assign or unassign users to or from the department. To do this, refer to Assigning Users to DT Departments on page 51 and Unassigning Users from Departments on page 53.

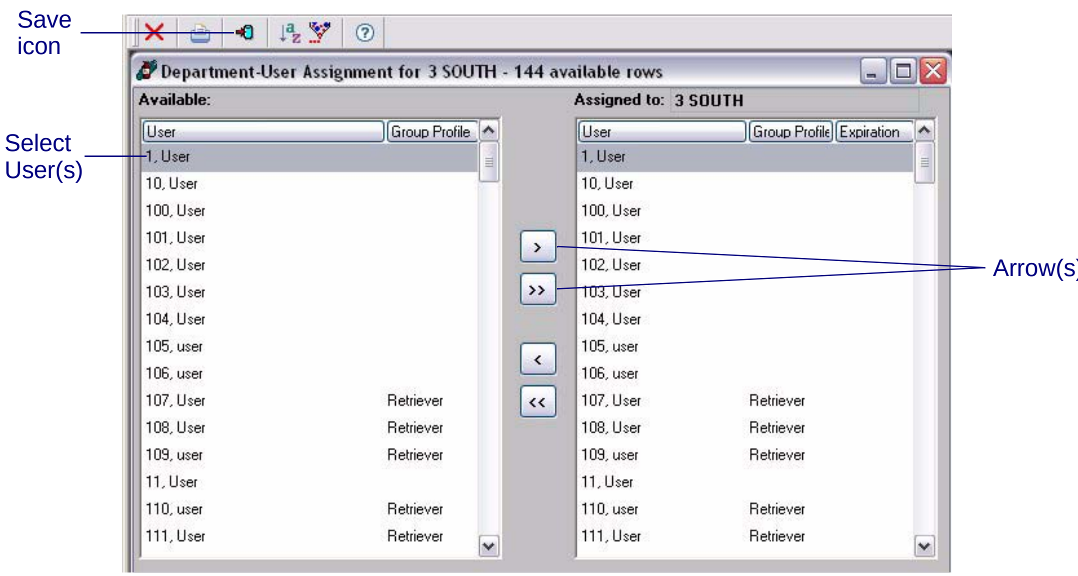
Assigning Users to DT Departments

You must have administrate rights to assign users to DT departments.

Follow the steps below to assign users to departments.

Note: You can also assign/unassign departments to/ from users from the Department Assignment to User window.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.
2. Click ***User*** on the Department Maintenance window to open the Department User Assignment window (shown in the following image).



3. Select a user in the left column and click the > arrow to assign the user to the department or click the >> arrows to assign all users to the department. Or you can drag and drop a user name from one side of the window to the other.

4. Click the Save icon.

Note: Refer to Users on page 71 for specifics on working with user details. Refer to Group Profiles on page 95 to learn about assigning users to group profiles.

Unassigning Users from Departments

Follow the steps below to unassign a user from a department.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.
2. Click ***User*** to open the Department User Assignment window.
3. Select a user in the right column and click the < arrow to unassign a user from the department or click the << arrows to unassign all users from the department.

   You can also drag and drop a user name from one side of the window to the other.
4. Click Save in the toolbar.

Note: Refer to Users on page 71 for specifics on working with users and details. Refer to Group Profiles on page 95 to learn about assigning users to group profiles.

Department Maintenance Field Definitions

Review the information in the table below when you create or edit a department.

Field	Explanation
Department	
Department	When you choose a department from the list, the department name appears in the Department field.
Facility/Site	A read-only field naming the facility/site

Field	Explanation
Time Zone / Daylight Savings	The department time zone. If your system includes sites that cross time zones, times will display based on the department time zone instead of the server time zone. Click the ***Time Zone*** button on the right to change the selection. Refer to page 61 for information on changing time zones. The Daylight Savings check box, when checked, indicates that the time zone is affected by Daylight Saving Time.
Date Format	Choose a date format for the way you want dates to display. Choose either mm/dd/yyyy (the system default), or dd/mm/yyyy.
Display Terminal Options	
Restock/Retrieve Witness	When checked, indicates that any restocking or retrieving of any drugs in this department requires a witness to log in to the DT.
Find Patient by ID	When checked, indicates that when a user performs a patient find at a DT, the patient ID field is an option for specifying find data.
Witness to Open Discrepant Position	When checked, indicates that when a user attempts to open a discrepant position as part of the discrepancy resolution process, a witness is required to log in.
Force Dispense Quantity Entry	When checked, indicates that the Med/Supply browser does not default the dispense quantity to one item. When a user selects an item for dispensing, the item has no dispense quantity associated with it.The user must enter a quantity before the item can be dispensed.
Hide Department from Find/Add	When checked, this department is not accessible from DTs outside the department searching for patients. This option works with the Allow Find/Add Within Department option.

Field	Explanation
Allow Find/Add within Department	This option works with the Hide Department from Find/Add option. When the department is hidden from other departments, this option allows users to find patients at other DTs within this department. If Hide Department from Find/Add is turned off, this option will have no effect.
Allow Find/Add for All Facilities	When checked, allows users to search for and/or add patients within the entire MedSelect system. This option is only effective for systems with multiple facilities.
Physician Required	When checked, indicates that a physician is required for dispensing a non-MedOrder.
Waste Reason Required	When checked, indicates that a reason is required when wasting a med.
Verify Dispense	When checked, requires a user to verify all dispenses associated with the department: • A list of items dispensed displays at the DT. • Register barcodes will prompt a 0 of X scanned under the drug name. • Barcodes not registered will display as visual, indicating visual verification required.
Witness for Override	When checked, the user dispensing the medication must have a witness: • Recommended for hospitals without 24/7 pharmacy coverage. • With a witness, a user can access all medications/supplies in the machine. • If using this feature, a customer need not enable Facility MedOrder Override.
Force Override Reason	When checked, a user must document the reason for a non-MedOrder dispense.

Field	Explanation
Allow Retrieve All	When checked, this will hide or show the Empty All button at the Retrieve Browser.
Witness for SIA Maintenance	When checked, the user performing SIA drawer troubleshooting must have a witness.
Require Return Scan	When checked, the user will be required to scan item barcodes when returning items.
Require Retrieve Scan	When checked, the user will be required to scan item barcodes when retrieving.
Force Allergy Display	When checked, and the user touches ***Override*** on the MedOrder browser, the Allergies window automatically displays. The Allergies window also automatically displays from the Pick List window.
Audit Failed Position	When checked, users working at the DT are prompted to audit the contents of failed positions.
Force Count on Restock	When checked, users working at the DT are prompted to do a blind count of the contents of the position being restocked. This setting applies only to items marked as count remaining.
Allow Decimal Dispensing	When checked, orders may contain decimals
Display Terminal Sorts/Toggles	
Med/Supply Name	Sorts by either the medication manufacturer’s product name or the generic equivalent name.
Patient Browser (first)	Sorts by either the patient name or room. The Joint Commission on Accreditation of Health Care Organizations does not accept Room as positive ID for patient.
Patient Browser (second)	Sorts by either the patient ID, his/her birth date, visit ID, or admit ID.

Field	Explanation
Restock Window	When viewing the window, it sorts either by position (DT location and the bin, shelf, drawer, etc. within the DT) or by supply.
Usage Browser	Sorts by either the date or the supply.
MedOrder Browser	Sorts by either the med give time or the supply.
Display Terminal Settings	
ID Card Leading Digits/ID Card Trailing Digits	Determines how the system reads a user's ID string from a swiped or scanned card ID. A number greater than zero represents the amount of numeric values to be ignored at the beginning or end of the string.
DT Timeout	The length of time, in seconds, that a DT can be idle before logging out the user.
Restock Timeout	The length of time, in seconds, that a DT can be idle during a restock before automatically logging out the user. This is usually longer than the regular DT Timeout.
Patient Usage	History of past transactions within a given time frame (Suggestion: 80 hours).
User Count Timeout	The length of time in seconds that a DT can be idle while the User Count window displays.
Closed Visit Display	The length of time a patient with a closed visit can be located at a DT using the Find button. The DT Find Closed Visit must be checked in the Facility Maintenance window. The time frame can't exceed the patient usage hours and must be more than zero hours.

Field	Explanation
Clinical Comment	The user selects if and when comments display on the DT. Use the clinical comments field to provide information for a user in a department. The options are: • Not Displayed - will never display a comment • Override - a comment will appear when a supply with a comment is chosen from a supply list • MedOrder - a comment will appear when a supply with a comment is chosen from a MedOrder • Always Displayed - will always display a comment (Suggestion: Select ***Always displayed*** for ancillary units.)
Witness for Audit	Requires a witness when working with audit screens or to work with controlled substances (schedules 1-5) or for both.
DT Supply Search	This option allows users to search for supplies at other DTs, and is activated when the user is searching for a supply that is out of stock at the user's DT. This feature can be set to turn off, to only show DTs within the department, to show DTs within the facility, or to show all DTs in the system.
MedOrder Properties	
Show All MedOrders	Displays all MedOrders that should have been dispensed or are scheduled to be dispensed to a patient. The time is split before and after the current time. (Suggestion: 24 - 48 hours).
PRN Dispense Count Warning	If your setup supports dispense count limits, specify the desired number of dispenses after which a warning will appear to notify the user that the PRN dispense count is low.
Stop Date for Scheduled Orders	Choose an amount of time, in hours, for which a scheduled order may be dispensed past the order stop date.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Stop Date for PRN Orders</td><td>Choose an amount of time, in hours, for which a PRN order may be dispensed past the order stop date.</td></tr>
<tr><td colspan="2">Receipt Printing</td></tr>
<tr><td>Pick List Dispense</td><td rowspan="8">Choose an option from the drop-down list next to each of these fields. Choose from among:
• Yes - print a receipt
• No - do not print a receipt (this is the default)
• Prompt - a prompt will appear, offering the user an option to print</td></tr>
<tr><td>Narcotic Dispense</td></tr>
<tr><td>MedOrder Dispense</td></tr>
<tr><td>Waste</td></tr>
<tr><td>Return</td></tr>
<tr><td>Restock</td></tr>
<tr><td>Discrepancy</td></tr>
<tr><td>Audit</td></tr>
<tr><td colspan="2">NWS</td></tr>
<tr><td>Allow NWS Queuing</td><td>The default setting is to allow NWS queuing; however, if you want to disable this option, un-check the check box. This option is only enabled for virtual desktop setups.</td></tr>
<tr><td>Queue Purge</td><td>Specify the number of hours after which you want to purge the NWS patient queue.</td></tr>
<tr><td>Waste Enabled</td><td>When selected, this option allows users to use the remote waste function.</td></tr>
<tr><td>Timeout</td><td>The amount of time in seconds after which the NWS will time out if there is no activity.</td></tr>
</table>

Field	Explanation
Other	
Mail Recipients	The system sends an email to the addressee if there is a stock out. Mail recipients are specified at the facility and/or the department. Department level addresses take precedence over facility level addresses. You can type multiple addresses by separating addresses with a semicolon.
Pharmacy Check Prefix	Type the prefix you want to use (if any), when you are using the pharmacy check feature. The prefix will appear on the pharmacy approval code, and identifies the pharmacy for which the codes are being generated.
My Patient List Purge	Type the number of hours after which the My Patient list contents will be purged. The default setting is 12 hours.
E-Kit Medication Lockout Settings (LTC)	
Lockout Cycle (in hours)	The number of hours you type here is specific to a patient and medication. The number you type (typically 24 or 48) represents a cycle of lockout and dispense. Type a ‘0’ if you want to turn off this feature.
Lockout Reset (in days)	The number of days you type here is specific to a patient and medication. Lockout resets after the number of days you type here have passed. When a medication for a specific patient is accessed during override, the lockout feature takes effect, toggling between access and lockout. If set to 2 days, and the medication is not accessed during that time span for the specific patient, toggling stops. The next access to this medication for this patient starts over.

Field	Explanation
Lockout Narcotics Only	When checked, this lockout feature applies to controlled substances, specifically schedule 2 through 6 medications. The setting is specific to a patient and medication.
Applies to Override	Check this option if you want your E-Kit lockout settings to apply to override dispenses.
Applies to MedOrders	Choose a setting from the drop-down list. **No** - Lockout feature will not apply to any MedOrder dispense. **PRN only** - Lockout feature will only apply to PRN orders **PRN + One Time** - Lockout feature will only apply to PRN and one-time orders **All** - Lockout feature will apply to all MedOrder dispenses

Changing Department Time Zone

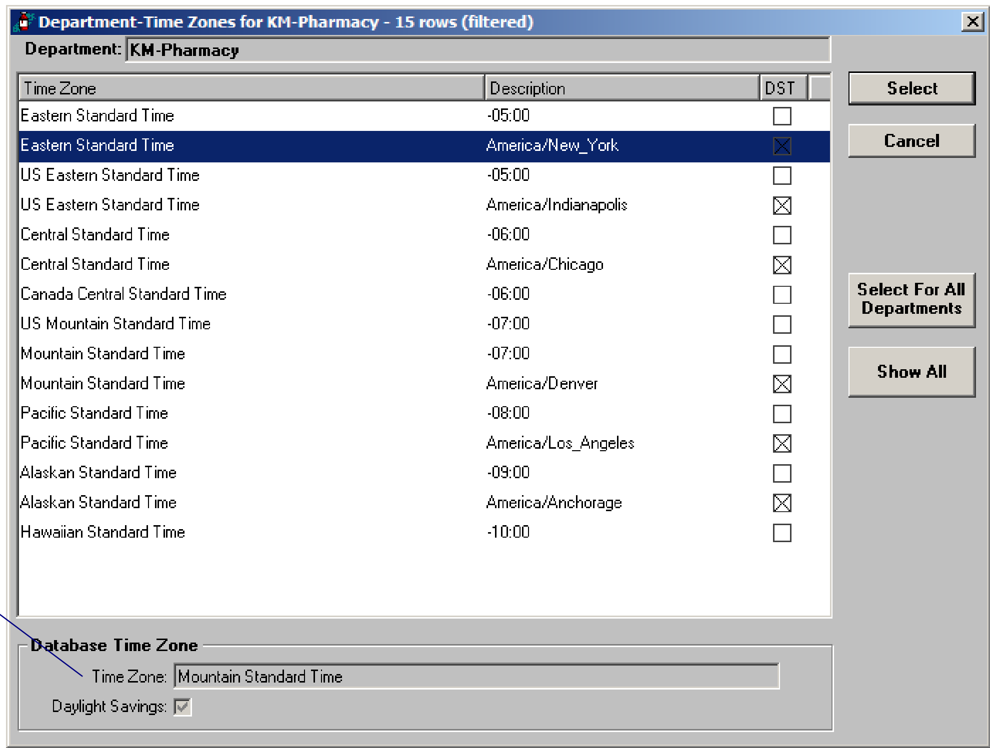
You may want to change a department time zone when, for example, the department resides in a different time zone than that of the server. This may be the case when your system headquarters is located in a different time zone than some, or all, of your facilities. You can work with time zones if your user permissions include the Time Zone access right.

Follow the steps below to change a department time zone.

1. From the Maintenance menu at the top of the AWS main window, choose Department. The Department Maintenance window appears.

2. Choose a department.
3. Click ***Time Zone*** (on the right side of the window). The Department Time Zones window appears, as shown in the following figure.

This window displays the time zone options, and provides a description as well as a DST check box to indicate whether the time zone observes Daylight Savings Time.



The time zone that applies to your database appears here.

If the database time zone observes Daylight Savings Time, the Daylight Savings check box will be checked.

4. Choose a time zone from the list.
5. Click ***Select*** to apply this selected time zone to the department; or choose ***Cancel*** to return to the previous window.

6. If you wish to apply the selected time zone to all departments, click ***Select For All Departments***.
7. If desired, click ***Show All*** to view all time zones in the world.

Deleting a DT Department

Follow these steps to delete a DT department.

1. Choose Department from the Maintenance menu; the Department Maintenance window opens.
2. Choose the department you want to delete from the list at the top of the window.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click Save in the toolbar.

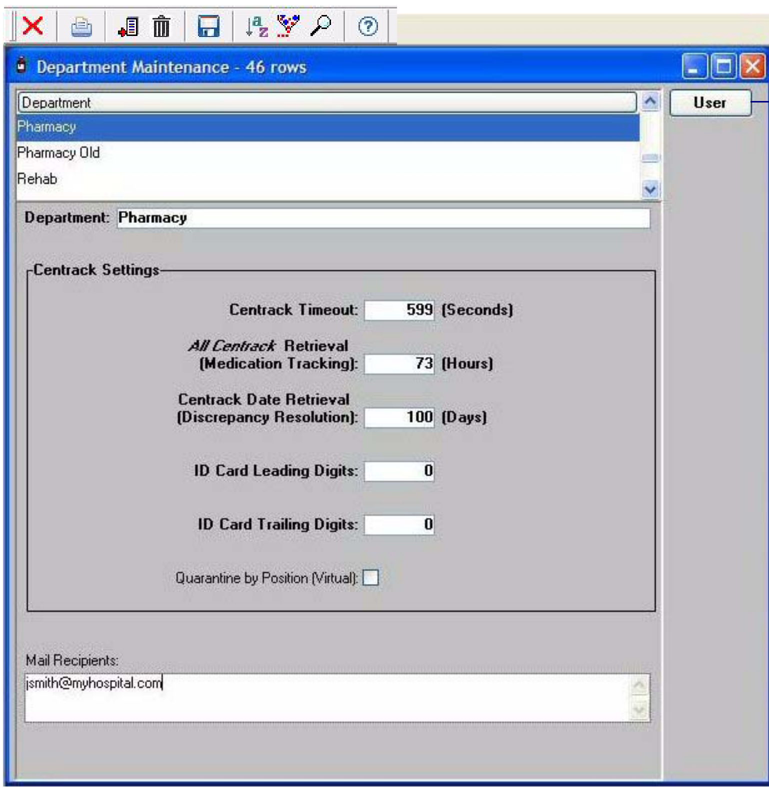
Working with Centrack Departments

Centrack is a separate software application that simplifies record-keeping and supply tracking of controlled substances in the pharmacy from receipt through distribution to resolution. Centrack tracks drugs that are stocked, retrieved, unloaded or expired until you place them into quarantine, return them to the pharmacy or destroy them.

Centrack departments are a collection of locations, which are Centrack only. You may set global attributes for Centrack departments.

Begin by selecting Department on the Maintenance menu on the AWS main window to open the Department Maintenance window.

A window similar to that shown here opens if the first department is for Centrack (or, you can choose a Centrack department from the list).



User

This type of window opens when a Centrack department is first in the list or when you select a Centrack department

Enter information, select options, and select from drop-down boxes

Creating a Centrack Department

Follow the steps below to create a new Centrack department.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.
2. Click the Insert icon on the toolbar of the Department Maintenance window to clear the Department field.
3. Enter the Centrack department name.
4. Complete each field. Bold fields require information, referring to the table on page 68 for an explanation of the fields.
5. Click the Save icon.

After you create a Centrack department, you can assign users to departments. To do this, refer to Assigning Users to Centrack Departments on page 66.

Editing a Centrack Department

Follow the steps below to edit a Centrack department.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.
2. Select a department from the list at the top of the window.
3. Edit the fields as necessary, referring to the table on page 68 for explanations of the Centrack Settings fields.

4. Click Save in the toolbar.

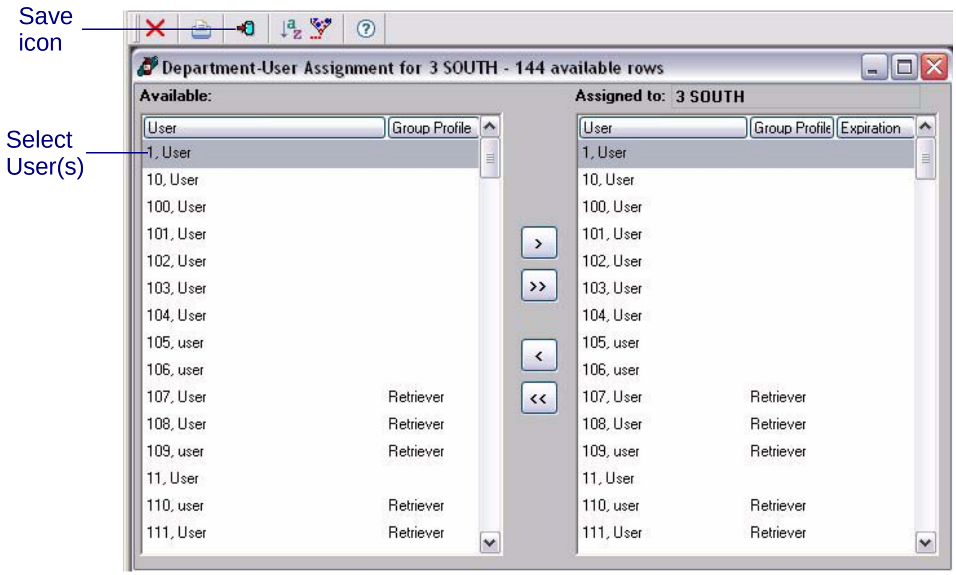
   After you edit a department, you can assign or unassign users to or from the department. To do this, refer to Assigning Users to Centrack Departments on page 66 and Unassigning Users from Departments on page 67.

Assigning Users to Centrack Departments

You must have administrate rights to assign users to DT departments.

Follow the steps below to assign users to departments.

1. Choose Department on the Maintenance menu to open the DT Department Maintenance window.
2. Select a department from the list at the top of the window.
3. Click ***User*** to open the Department User Assignment window.



4. Select a user in the left column and click the > arrow to assign the user to the department or click the >> arrows to assign all users to the department.

   You can also drag and drop a user name from one side of the window to the other.

5. Click Save in the toolbar.

Unassigning Users from Departments

Follow the steps below to unassign a user from a department.

1. Choose Department on the Maintenance menu to open the Department Maintenance window.

2. Select a department from the list at the top of the window.
3. Click ***User.***
4. Select a user in the right column and click the < arrow to unassign a user from the department or click the << arrows to unassign all users from the department.

   You can also drag and drop a user name from one side of the window to the other.
5. Click the Save icon.

Note: Refer to Users on page 71 for specifics on working with users and details. Refer to Group Profiles on page 95 to learn about assigning users to group profiles.

Centrack Settings Field Definitions

Refer to the following table for an explanation of each of the fields on the Centrack Department Maintenance window.

Field	Explanation
Centrack Timeout	The length of time, in seconds, that Centrack can be idle before logging out the user.
All Centrack Retrieval (Medication Tracking)	The value defining the default number of hours to go back when retrieving all Centrack events, which are displayed in a list in the Centrack Medication Tracking function (not part of AWS). The user may specify different retrieval dates within Medication Tracking.

Field	Explanation
Centrack Date Retrieval (Discrepancy Resolution)	The value defining the default number of days you can retrieve a list of discrepancies. The user may specify different retrieval dates in the Centrack Discrepancy Resolution function.
ID Card Leading Digits/ID Card Trailing Digits	Determines how the system reads a user's ID string from a swiped or scanned card ID. Any number greater than zero represents the amount of numeric values ignored either at the beginning or end of the string.
Quarantine by Position (Virtual)	This function is no longer used by Centrack. Leave it clear because checking it will not activate it.
Mail Recipients	Enter e-mail address(es) at the facility and/or the department. You can type multiple addresses by separating them with a semicolon. Department level addresses take precedence over facility level addresses.

Deleting a Centrack Department

Follow the steps below to delete a Centrack department.

1. Choose Department on the Maintenance menu; the Department Maintenance window opens.
2. Select the department you want to delete from the list at the top of the window.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the save icon.

Notes:

Users

AWS users are site personnel who dispense drugs, enter or change data, assign and unassign supplies, create locations, and perform other administrative duties. Each AWS user is assigned to one or more departments and can log in to display terminals (DTs) in departments to which they are assigned.

You must have AWS login and administrate access rights (refer to Adding a User shown on page 73) to create and edit users and define access privileges for users. The rights you assign to users can vary and may be part of a group profile.

You can set login expiration dates to limit the time a user account is valid and also temporarily disable a user if, for example, a user goes on vacation.

All these actions take place on the User Detail window.

Working with the User Browser

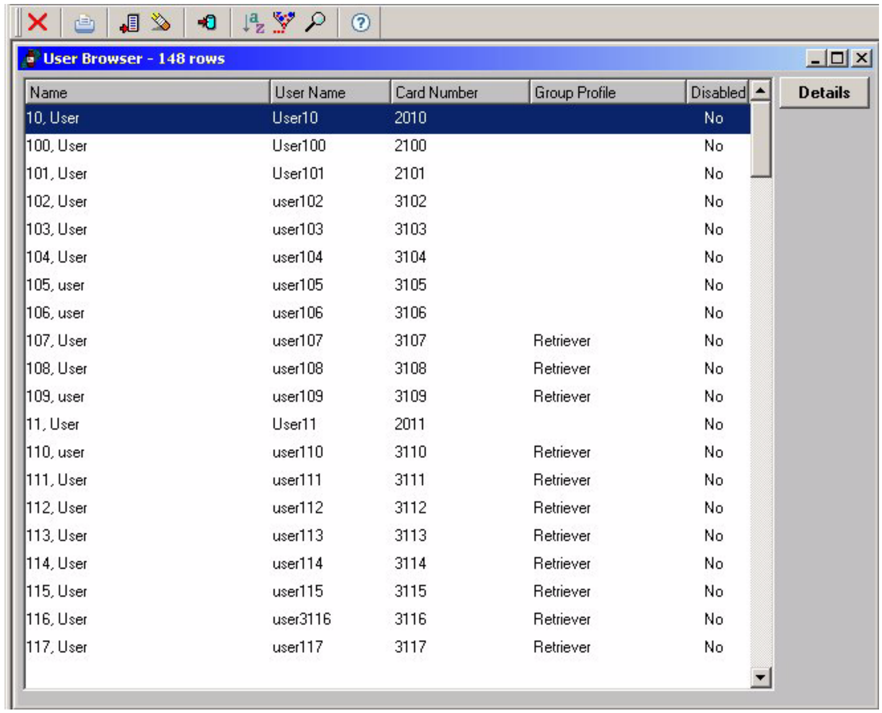
Follow the steps below to open the User Browser.

1. Select User on the Maintenance menu.

Choose Maintenance,
then choose User

2. Select User Browser to open the User Browser.

   After opening the User Browser, you will see a list of all current AWS users.



Adding a User

Follow the steps below to add a new user.

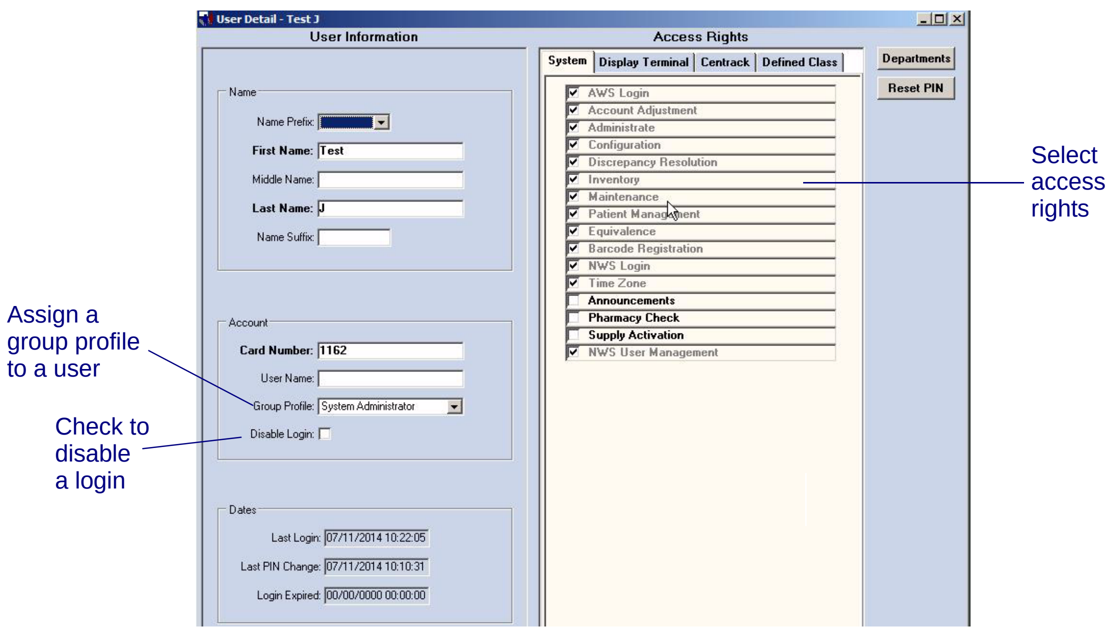
1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Click Add in the toolbar of the User Browser to open a blank User Detail window.

   If you are already on the User Details window, click add in the toolbar to open a blank window.

4. Complete the fields (bold fields require information), referring to the tables that begin on page 83 for explanations of each of the fields.
5. Select the access rights check boxes under the System, Display Terminal, Centrack, and Defined Class tabs required for the user.

Note: Select all user rights if the new user will be an administrator.

6. Click the Save icon.



User Detail window

After you add a user, you can assign departments to the user. To do this, refer to Assigning Departments to Users on page 75.

Editing a User

Follow the steps below to edit a user detail.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Edit the fields as necessary. Bold fields require information.

   Refer to the tables on page 81 and page 83, for explanations of the fields and check boxes.

5. Click the Save icon.

   After you edit the information on the User Detail window, you can assign or unassign departments to or from the user, if necessary. To do this, refer to Assigning Departments to Users on page 75 and Unassigning Departments from Users on page 76.

Assigning Departments to Users

You must have administrate rights to assign departments to users.

Follow the steps below to assign a department to a user.

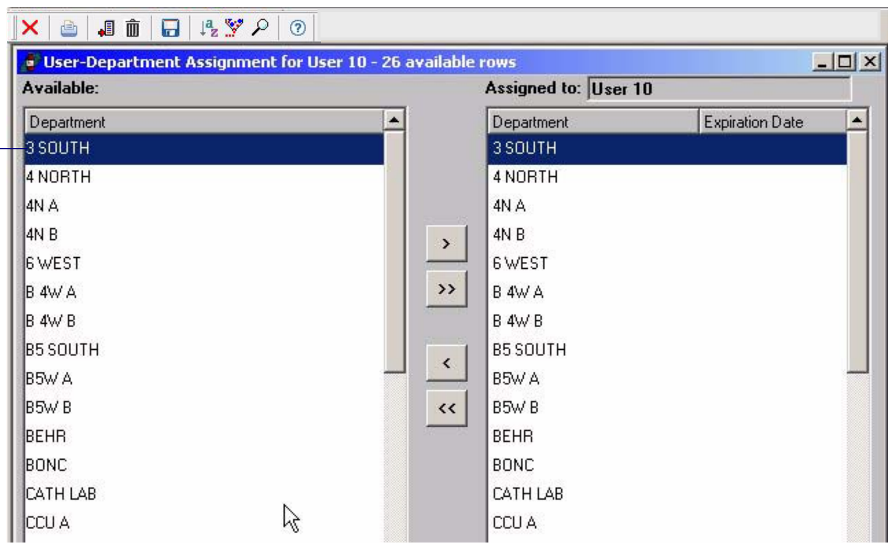
1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user.

4. Click ***Departments***. The User-Department Assignment window opens.

5. Select a department in the left column and click the > arrow to assign the department to a user or click the >> arrows to assign all departments to the user.

   You can also drag and drop department names from one side of the window to the other.

Select a department



6. Click the Save icon.

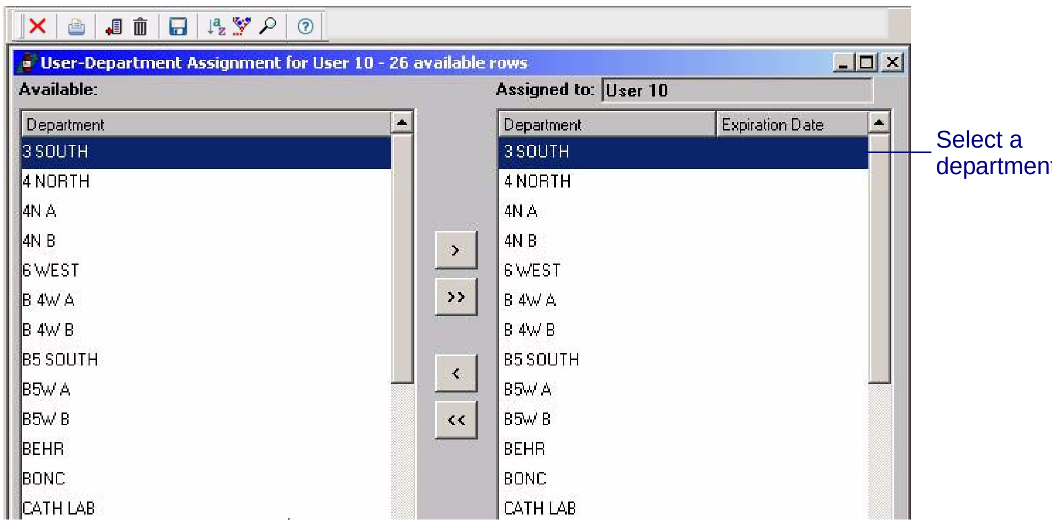
Unassigning Departments from Users

Follow the steps below to unassign a department from a user.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.

3. Click ***Departments***. The User-Department Assignment window opens.
4. Select a department in the right column, and click the < arrow to unassign a department from a user or click the << button to unassign all departments from the user.

   You can also drag and drop department names from one side of the window to the other.



5. Click the Save icon.

Assigning a Group Profile to a User

Follow the steps below to assign a group profile to a user. For more information on group profiles, see Group Profiles on page 95.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.

3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Select a group profile from the Group Profile drop-down box on the User Detail window.
5. Click the Save icon.

Clearing a User from an Assigned Group Profile

Follow the steps below to clear a user from a group profile.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Select the Group Profile drop-down box on the User Detail window, then press the spacebar.
5. Click the Save icon.

Temporarily Disabling a User

You can disable a user’s ability to log in if s/he will not be using the system on a regular basis, for example, when the user goes on vacation.

Follow the steps below to temporarily disable a user.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.

4. Select the Disable Login option.
5. Click the Save icon.

Enabling a User After Being Temporarily Disabled

You can enable a user's ability to log in after s/he has been temporarily disabled.

Follow the steps below to enable a user.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Clear the Disable Login check box to allow a login and enable a user.
5. Click the Save icon.

Resetting a Personal Identification Number (PIN)

At times you may need to reset a user PIN. For example, a user may have forgotten his/her PIN.

Follow the steps below to reset a user's PIN.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Click ***Reset PIN*** on the User Detail window.
5. Click the Save icon.

6. This resets the PIN to 9999.The next time the user tries to log into an AWS or DT, s/he must enter 9999 on the login window. The system will prompt the user to change the PIN.

Note: An administrator cannot create a user's PIN.

Note: The System Log Messages Report lists all PIN resets.

Setting a User Expiration Date

At times you may want to set an expiration date for a user's ability to access the DTs in a department. For example, if a user is scheduled to work in a department up to a specified date and time, you can set the time frame to limit the user's access to the department DTs.

Follow the steps below to set a user expiration date.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Click ***Departments*** to open the Department Assignment to User Window.
5. Select the department for which you want to set the expiration date from the right column.
6. Select Data on the top toolbar.
7. Select Change Expiration from the Data menu, and enter the expiration date (mm/dd/yyyy; time must be military time).
8. Click the Save icon in the toolbar.

The expiration date will display in the right-hand column.

Clearing a User Expiration Date

Follow the steps below to clear a user expiration date.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row and click ***Details*** or double-click a row to open the User Detail window.
4. Click ***Departments*** to open the Department Assignment to User Window.
5. Select the department for which you want to clear the expiration date from the right column.
6. Select Data on the top toolbar.
7. Select Clear to clear the expiration date.
8. Click the Save icon in the toolbar.

   The expiration date will no longer display in the right-hand column.

User Detail Field Definitions

Refer to the following table for an explanation of each of the User Detail fields.

Field	Explanation
Name Prefix	Enter titles such as Dr., Mr., Mrs. (15 characters maximum).
First Name	Enter the user's first name or initial (15 characters maximum).

Field	Explanation
Middle Name	Enter the user's middle name or initial (15 characters maximum).
Last Name	Enter the user's last name (15 characters maximum).
Name Suffix	Enter descriptors that follow a name such as Jr., III, MD., PhD.
Card Number	Enter the number used to log in to the DT. This number may be encoded on an ID swipe card, on a proximity card or entered at the login window (15 characters maximum).
User Name	Enter the name that identifies the user to the MedSelect System. User names combine the first name with the last initial. For example, John Jones would be johnj. Use this to log in to the AWS (15 characters maximum).
Group Profile	Select the group profile from the drop-down box, which includes associated access rights that have been assigned to users. Refer to Adding a Group Profile on page 97.
Disable Login	Check this box to disable the user and disallow logging in to any MedSelect applications. Clear it to enable the user.

User Rights Field Definitions

Refer to the tables below for information about the fields on the User Detail window.

System Tab	
Check Box	**Explanation**
AWS Login	This allows a user to log into the AWS with a valid user name and PIN to view patient information.
Account Adjustment	This allows a user to merge patient or visit records and to transfer events between patient accounts using Account Adjustment, and to assign unknown events to patient accounts using Inventory Adjustment.
Administrate	This allows a user to maintain user accounts, including group profiles and customer-defined classes. It allows a user to maintain facility and department information. It gives the user the right to add temporary users at the DT.
Configuration	This allows a user to modify the system configuration information that includes dispensing devices, storage areas, and related components.
Discrepancy Resolution	This allows a user to resolve discrepancies at the DT and the AWS.
Inventory	This allows a user to add, update, and delete supply information through the formulary import application or the Administrative WorkStation. It also allows a user to assign supplies to positions, adjust supply minimum and maximum quantities, expire supplies, and build kits.
Maintenance	This allows a user to add, update or delete Route, Site, Reason, Physician, Kit and Location information. It also allows a user to use Physician Import and Location Import and SigCode Import.

System Tab	
Check Box	**Explanation**
Patient Management	This allows a user to add, update, and delete patient information and to close visit records at the Administrative WorkStation. Users without this right may still view patient information. This right has no impact on a user's ability to add a patient at the DT. All users with login rights may add a patient at the DT.
Equivalence	This allows a user to add, modify or delete equivalence groups.
Barcode Registration	This allows a user to register barcodes on the Administrative WorkStation and the DT.
NWS Login	This allows a user to log into a Nursing WorkStation (NWS) and access reports on patient data. A user that attempts to log into an NWS must also be assigned to the same department as that NWS (NWS software only).
Time Zone	Users with this access right can change department time zones.
Announcement	Users with this access right can work with system announcements.
Pharmacy Check	This option appears when the Pharmacy Check option is enabled in the facility settings. Check this option when you want the user to have access rights to the pharmacy check feature. See the *MedSelect Flex Display Terminal User Guide* for more information.
Supply Activation	Users with this access right can access the Inactivate Supply option on the Management menu.
NWS User Management	Users with this access right can manage users of the NWS.

Display Terminal Tab	
Check Box	**Explanation**
DT Login	This allows a user to log into a DT, dispense non-narcotic supplies, and add or find patients at the DT. A user that attempts to log into a DT must also be assigned to the same department as that DT.
Override MedOrder	This allows a user to dispense a supply by overriding a MedOrder (MedOrder systems only).
Restock	This allows a user to enter the Restock browser. Once in the browser, the user must have the Restock right (both DEA and customer defined class) for the medication in the position being restocked, as well as the other medication in that same cabinet or drawer position.
Retrieve	This allows a user to remove medications from a return drawer regardless of the user's rights to dispense DEA scheduled medications. (If the department requires a restock/retrieve witness, the user cannot retrieve medications without a witness.)
Witness	This enables a user to be a witness for wasting, restocking, override or retrieving of medications. If a user has witness rights, that user can be a witness to the wasting, restocking, override or retrieving of medications even if that user does not have access rights to dispense those medications.
Schedule I Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule I narcotics.
Schedule II Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule II narcotics.
Schedule III Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule III narcotics.

Display Terminal Tab	
Check Box	**Explanation**
Schedule IV Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule IV narcotics.
Schedule V Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule V narcotics.
Schedule VI Dispense/ Restock	This allows a user to either dispense or restock supplies with a Schedule of VI. Schedule VI is not an official classification in most states, but has been provided as a way of securing supplies that do not fall under the official I through V schedules.
OTC Dispense/Restock	This allows a user to either dispense or restock over-the-counter supplies.
Legend Dispense/ Restock	This allows a user to either dispense or restock any supply requiring a prescription.
Patient Specific Restock	This allows a user to restock suppies to a patient specific position.
Schedule I Restock	This allows a user to restock schedule I supplies
Schedule II Restock	This allows a user to restock schedule II supplies
Schedule I Restock	This allows a user to restock schedule III supplies
Schedule IV Restock	This allows a user to restock schedule IV supplies
Schedule V Restock	This allows a user to restock schedule V supplies
Schedule VI Restock	This allows a user to restock schedule VI supplies
Audit	This allows a user to log into the Audit function and audit supplies with no defined schedule.
Audit Witness	This allows a user to login as an audit witness. A user with this right can act as a witness when a discrepancy occurs in a count remaining drawer.

Display Terminal Tab	
Check Box	**Explanation**
Schedule I Audit	This allows a user to audit DEA Schedule I narcotics.
Schedule II Audit	This allows a user to audit DEA Schedule II narcotics.
Schedule III Audit	This allows a user to audit DEA Schedule III narcotics.
Schedule IV Audit	This allows a user to audit DEA Schedule IV narcotics.
Schedule V Audit	This allows a user to audit DEA Schedule V narcotics.
Schedule VI Audit	This allows a user to audit supplies with a Schedule of VI. Schedule VI is not an official classification in most states, but has been provided as a way of securing supplies that do not fall under the official I through V schedules.
OTC/Legend Audit	This allows a user to audit over-the-counter supplies or supplies requiring a prescription.
UDM Audit	This allows a user to audit all of the supplies contained in the UDM.
SIA Maintenance	This allows a user to troubleshoot the SIA drawer and/or drawer positions in the event of an issue.

Centrack Tab	
Check Box	**Explanation**
Centrack Discrepancy Resolution	This allows a user to resolve Centrack discrepancies (Centrack software only).
Centrack Audit	This allows a user to audit Centrack positions (Centrack software only).
Centrack Witness	This allows a user to be a Centrack witness (Centrack software only).

Centrack Tab	
Check Box	**Explanation**
Centrack Login	This allows a user to log into Centrack (Centrack software only).
Centrack Cabinet Maintenance	This allows a user to perform Centrack maintenance duties.
Reconcile	This allows users to manually reconcile and to un-reconcile.
Waste	This allows the user access to the waste function.
Quarantine	This allows the user access to the quarantine function.
Deposit	This allows the user access to the deposit function
Load/Unload	This allows the user access to the load and unload functions
Withdraw	This allows the user access to the withdraw function
Return to Pharmacy	This allows the user access to the return to pharmacy function
Borrow/Loan/Sell	This allows the user access to the borrow, loan, and sell functions
Compound/Unit Package	This allows the user access to the compound and unit package functions
Expire/Recall	This allows the user access to the expire and recall functions
Schedule I	This allows the user access to schedule I medication
Schedule II	This allows the user access to schedule II medication
Schedule III	This allows the user access to schedule III medication
Schedule IV	This allows the user access to schedule IV medication
Schedule V	This allows the user access to schedule V medication

Centrack Tab	
Check Box	**Explanation**
Schedule VI	This allows the user access to schedule VI medication
OTC	This allows the user access to work with OTC medication
Legend	This allows the user access to work with legend medication

Defined Class Tab	
Check Box	**Explanation**
Dispense and Restock Rights Defined by Administrator	This allows a user to restock, dispense or audit classes of supplies previously defined by the administrator through the AWS. If no classes are defined, this area is empty.

Deleting a User

Follow the steps below to delete a user.

Note:You cannot delete yourself. If you must delete your own record, you must first create a new record for yourself - refer to Adding a User shown on page 73 and log on with that new ID. You can then delete your old record.

1. Choose User on the Maintenance menu.
2. Choose User Browser to open the User Browser.
3. Select a user row on the User Browser.
4. Click the Delete icon; a confirmation window appears.

5. Click ***Yes*** to confirm the deletion.
6. Click the Save icon.

Importing Users

Data Requirements

When you initially set up your MedSelect Flex system, you must import user data into the MedSelect Flex database. The user data includes a card number and naming description for each user. The system displays this information on the User Detail window shown on page 74.

Note: The order for the import data is determined by the site and downloaded into the MedSelect Flex system from the site database during setup. It is recommended that the ABTG implementation team assist the site in this process or if the data requires modification.

User data must meet these requirements before being imported:

- Data must exist in a flat file (text) format.
- The flat file must be tab delimited.
- The flat file must have, at minimum, the required fields listed in the following table. Other fields are optional; no field can exceed the length specified in the following table.
- The user card number uniquely identifies the user. Existing records are updated with new information. New records are added to the database.
- The flat file must have the format defined in the following table (bold fields require data).

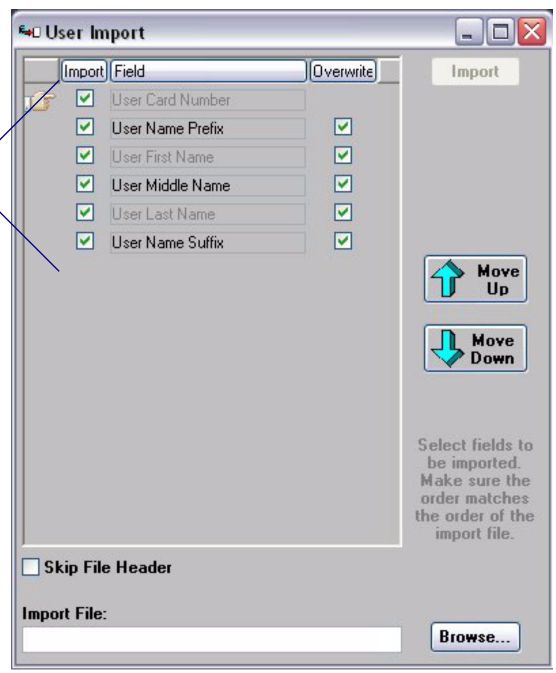
Field Name	Type	Length
User Card Number (required)	Numerals only	9
User Name Prefix	Char	4
User First Name (required)	Char	15
User Middle Name	Char	15
User Last Name (required)	Char	15
User Name Suffix	Char	8

Importing Users

After your data meets all the requirements described in the previous section, follow the steps below to import users.

1. Begin by selecting User Import on the Management menu to open the User Import window.

Select Import and/ or Overwrite Fields



2. Turn off any fields that are not part of your site data by clearing the check in the Import box.

Note: No new records will be added if a non-required field is cleared. Instead, only existing records will be updated. Required fields (grayed-out) cannot be cleared - a prompt will alert you if you attempt to clear a required field.

3. Arrange the order of the fields to match the order of the user import file. Select a field to move it up or down. Then click ***Move Up*** or ***Move Down***, or drag and drop the field to a new location in the list.
4. Check the Overwrite box to overwrite fields in existing records with imported values for a field. Leave it clear to preserve the value in the database if the data already exists.
5. Click ***Browse*** to locate and select the file, which will display in the Import File text box.
6. Select the Skip File Header box to ignore any header information in the file.
7. Click ***Import*** to import data into the database.

   A progress window displays to show the status of the import. When finished, the number of successful and failed imports displays. For failed imports, you can either continue or stop importing.
8. Select Data on the toolbar of the AWS main window, then select Save Column Format to save the format you used (that is, the order of fields).

You can also save when closing. When you close the window, a prompt will ask if you want to save the format you used (that is, the order of fields). Choose Yes to preserve this format. Or choose No, to open the list in its default format the next time the import function is used.

Notes:

Group Profiles

You can create group profiles for a group (or class) of users, such as RNs, LPNs, etc., that include specific access rights, instead of individually assigning rights to each user. You can provide any description for group profiles and include any access rights.

For example, suppose that you want to assign all registered nurses one set of rights, and assign all licensed practical nurses another set. You can create one group called RN, and another called LPN. To each of these profile groups, you can assign all the rights you want the group to have. Then, you can assign each nurse to the appropriate group. If you change the rights of the RN group, every user with RN profile group rights would be affected.

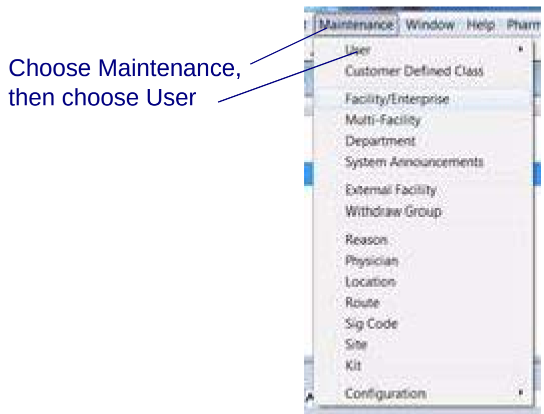
Once you have assigned a group profile to a user, you can add or delete additional individual rights but you cannot remove rights that are part of the profile.

You must have the administrate access right to create, edit or delete group profiles. Assign this right by selecting the Administrate check box on the User Detail window, see Adding a User on page 73.

Accessing Group Profiles

Follow the steps below to open the Group Profile Maintenance window.

1. Choose User on the Maintenance menu.

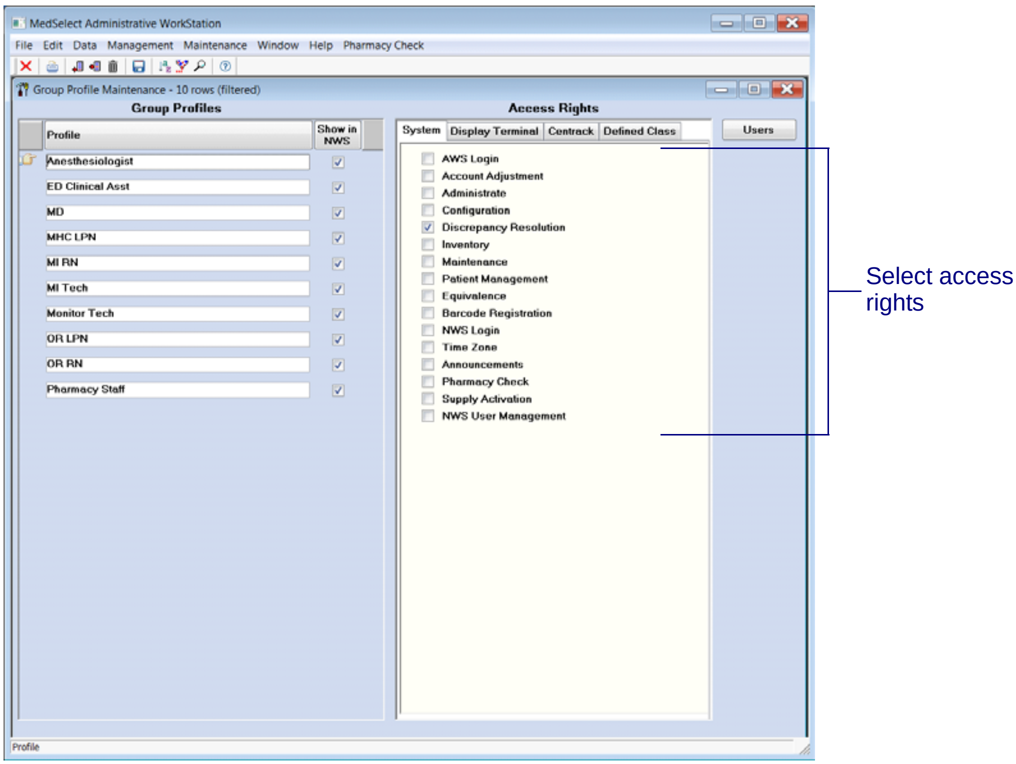


2. Select Group Profile to open the Group Profile Maintenance window. (See the following figure.)

Adding a Group Profile

Follow the steps below to add a new group profile.

1. Choose User on the Maintenance menu.
2. Select Group Profile to open the Group Profile Maintenance window.



3. Click the Add icon on the toolbar of the Group Profile maintenance window to open an empty Profile row.

4. Add a new group profile name, such as 5W RN (15 characters maximum).
5. Select the access rights check boxes under the System, Display Terminal, Centrack, and Defined Class tabs required for the group profile, referring to the tables starting on page 99 for an explanation of the options.
6. Click the Save icon.
7. Refer to Assigning a Group Profile to a User on page 77 to assign the new group profile to users.

Editing a Group Profile

Follow these steps to edit a group profile.

1. Choose User on the Maintenance menu.
2. Select Group Profile to open the Group Profile Maintenance window.
3. Select the group profile you want to change.
4. Select or clear access rights check boxes under the System, Display Terminal, Centrack, and Defined Class tabs as required, referring to the table of field definitions for an explanation of the options on each tab.
5. Click the Save icon.

Group Profile Rights

Refer to the tables below for information about the fields on the Group Profile Maintenance window.

System Tab	
Check Box	**Explanation**
AWS Login	This allows a user to log into the AWS with a valid user name and PIN to view patient information.
Account Adjustment	This allows a user to merge patient or visit records and to transfer events between patient accounts using Account Adjustment, and to assign unknown events to patient accounts using Inventory Adjustment.
Administrate	This allows a user to maintain user accounts, including group profiles and customer defined classes. It allows a user to maintain facility and department information. It gives the user the right to add temporary users at the DT.
Configuration	This allows a user to modify the system configuration information that includes dispensing devices, storage areas, and related components.
Discrepancy Resolution	This allows a user to resolve discrepancies at the DT and the AWS.
Inventory	This allows a user to add, update, and delete supply information through the formulary import application or the Administrative WorkStation. It also allows a user to assign supplies to positions, adjust supply minimum and maximum quantities, expire supplies and build kits.
Maintenance	This allows a user to add, update or delete route, site, reason, physician, kit and location information. It also allows a user to have access to physician, location, and sig code import.

System Tab	
Check Box	**Explanation**
Patient Management	This allows a user to add, update, and delete patient information and to close visit records at the Administrative WorkStation. Users without this right may still view patient information. This right has no impact on a user's ability to add a patient at the DT. All users with login rights may add a patient at the DT.
Equivalence	This allows a user to add, modify or delete equivalence groups.
Barcode Registration	This allows a user to register barcodes on the Administrative WorkStation and the DT.
NWS Login	This allows a user to log into a Nursing WorkStation (NWS) and access reports on patient data. A user that attempts to log into an NWS must also be assigned to the same department as that NWS (NWS software only).
Time Zone	Users with this access right can change department time zone settings.
Announcements	Users with this access right can work with system announcements.

Display Terminal Tab	
Check Box	**Explanation**
DT Login	This allows a user to log into a DT, dispense non-narcotic supplies, and add or find patients at the DT. A user that attempts to log into a DT must also be assigned to the same department as that DT.
Override MedOrder	This allows a user to dispense a supply by overriding a MedOrder (MedOrder systems only).

Display Terminal Tab	
Check Box	**Explanation**
Restock	This allows a user to enter the Restock browser. Once in the browser, the user must have the Restock right (both DEA and customer defined class) for the medication in the position being restocked, as well as the other medication in that same cabinet or drawer position.
Retrieve	This allows a user to remove medications from a return drawer regardless of the user's rights to dispense DEA scheduled medications. (If the department requires a restock/retrieve witness, the user cannot retrieve medications without a witness.)
Witness	This enables a user to be a witness for wasting, restocking, override or retrieving of medications. If a user has witness rights, that user can be a witness to the wasting, restocking, override or retrieving of medications even if that user does not have access rights to dispense those medications.
Schedule I Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule I narcotics.
Schedule II Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule II narcotics.
Schedule III Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule III narcotics.
Schedule IV Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule IV narcotics.
Schedule V Dispense/ Restock	This allows a user to either dispense or restock DEA Schedule V narcotics.
Schedule VI Dispense/ Restock	This allows a user to either dispense or restock supplies with a Schedule of VI. Schedule VI is not an official classification in most states, but has been provided as a way of securing supplies that do not fall under the official I through V schedules.

Display Terminal Tab	
Check Box	**Explanation**
OTC Dispense/Restock	This allows a user to either dispense or restock over-the-counter supplies.
Legend Dispense/ Restock	This allows a user to either dispense or restock any supply requiring a prescription.
Patient Specific Restock	This allows a user to restock supplies to a patient-specific position.
Audit	This allows a user to log into the Audit function and audit supplies with no defined schedule.
Audit Witness	This allows a user to login as an Audit witness. A user with this right can act as a witness when a discrepancy occurs in a count remaining drawer.
Schedule I Audit	This allows a user to audit DEA Schedule I narcotics.
Schedule II Audit	This allows a user to audit DEA Schedule II narcotics.
Schedule III Audit	This allows a user to audit DEA Schedule III narcotics.
Schedule IV Audit	This allows a user to audit DEA Schedule IV narcotics.
Schedule V Audit	This allows a user to audit DEA Schedule V narcotics.
Schedule VI Audit	This allows a user to audit supplies with a Schedule of VI. Schedule VI is not an official classification in most states, but has been provided as a way of securing supplies that do not fall under the official I through V schedules.
OTC/Legend Audit	This allows a user to audit over-the-counter supplies or supplies requiring a prescription.
UDM Audit	This allows a user to audit all of the supplies contained in the UDM.
SIA Maintenance	This allows a user to troubleshoot the SIA drawer and/ or drawer positions in the event of an issue.

Centrack Tab	
Check Box	**Explanation**
Centrack Discrepancy Resolution	This allows a user to resolve Centrack discrepancies (Centrack software only).
Centrack Audit	This allows a user to audit Centrack positions (Centrack software only).
Centrack Witness	This allows a user to be a Centrack witness (Centrack software only).
Centrack Login	This allows a user to log into Centrack (Centrack software only).
Centrack Cabinet Maintenance	This allows a user access to Centrack cabinet maintenance.
Reconcile	This allows a user access to the reconcile function.
Waste	This allows a user access to the waste function.
Quarantine	This allows a user access to the quarantine function.
Deposit	This allows a user access to the deposit function.
Load/Unload	This allows a user access to the load/unload functions.
Withdraw	This allows a user access to the withdraw function
Return to Pharmacy	This allows a user access to the pharmacy return function
Borrow/Loan/Sell	This allows a user access to the borrowing, loaning, and selling functions
Compound/Unit Package	This allows a user access to the compounding and unit packaging functions
Expire/Recall	This allows a user access to the expire/recall functions
Schedule I	This allows a user access to schedule I medication

Centrack Tab	
Check Box	**Explanation**
Schedule II	This allows a user access to schedule II medication
Schedule III	This allows a user access to schedule III medication
Schedule IV	This allows a user access to schedule IV medication
Schedule V	This allows a user access to schedule V medication
Schedule VI	This allows a user access to schedule VI medication
OTC	This allows a user access to work with OTC medication
Legend	This allows a user access to work with legend medication

Defined Class Tab	
Check Box	**Explanation**
Dispense and Restock Rights Defined by Administrator	This allows a user to restock, dispense or audit classes of supplies previously defined by the administrator through the AWS. If no classes are defined, this area is empty.

Deleting a Group Profile

Follow the steps below to delete a group profile.

1. Choose User on the Maintenance menu.
2. Select Group Profile to open the Group Profile Maintenance window.

3. Select the group profile you want to delete.
4. Click Delete in the toolbar; a confirmation window appears.
5. Click ***Yes*** to confirm the deletion.
6. Click the Save icon.

Note: You are not allowed to delete a group profile if the profile is assigned to any users. You must remove the assignment from all users before you can delete a group profile. If such a condition exists, a message appears.

Notes:

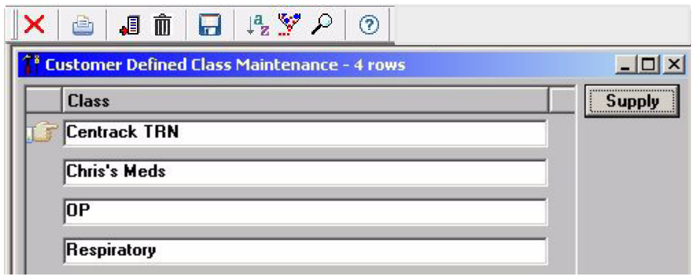
Customer-Defined Classes of Users

Use the customer defined class (CDC) function to create a class of users to whom you will then grant access to specific medications. For example, you may want to create a customer-defined class for anesthesiologists. If you do not want this class of users to have access to all the medications within a DT, you can grant them access to a limited subset of medications. You can grant these users restocking, dispensing, and auditing privileges for those medications.

Note: You must have the administrate access right to work with customer defined classes. See Adding a User on page 73 for setting rights.

Working with Customer-Defined Classes

Select Customer Defined Class on the Maintenance menu to open the Customer Defined Class Maintenance window.



From this window you can add, edit, or delete a customer-defined class (CDC).

Adding a Customer Defined Class

Follow the steps below to add a new CDC.

1. Select Customer Defined Class on the Maintenance menu to open the Customer Defined Class Maintenance window.
2. Click the Add icon on the toolbar of the Customer Defined Class Maintenance window to open a new class field.
3. Enter a class description (15 characters maximum) in the new row.
4. Click the Save icon.

Note: When you save a new CDC, the system automatically creates three access rights: restocking, dispensing, and auditing. You must assign these rights to users.

After you add a CDC, you can assign supplies to it. To do this, refer to Assigning Supplies to a Customer-Defined Class on page 110.

Editing a Customer-Defined Class

Follow the steps below to edit a customer defined class.

1. Open the Customer Defined Class Maintenance window.
2. Select a class.
3. Edit the field as necessary, referring to the table of field definitions that begins on page 110.
4. Click Save in the toolbar.

After you edit the information on the Customer Defined Class maintenance window, you can assign or unassign supplies to or from the CDC. To do this, refer to Assigning Supplies to a Customer-Defined Class on page 110 and Unassigning Supplies from a CDC on page 112.

Customer-Defined Class Field Definitions

Refer to the following table for an explanation of each of the Customer-Defined Class fields.

Field	Explanation
Generic name	The general, chemical, or non-brand name for a drug/supply.
Trade Name	The manufacturer's proprietary, US trademarked name for a drug/supply.
Form	The type of drug/supply used for administration, such as spray, vial, inhaler, etc.
Item Code	The code for the drug/supply as determined by your facility.

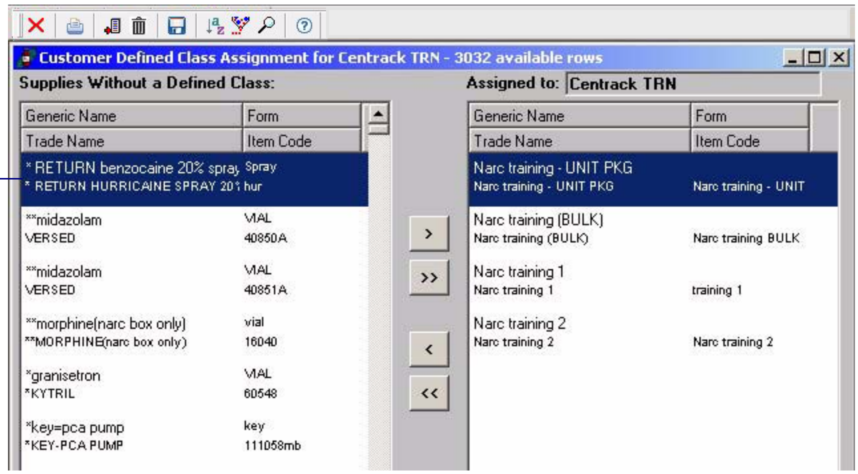
Assigning Supplies to a Customer-Defined Class

You must have the administrate right to assign supplies to a customer-defined class. See Adding a User on page 73 for setting rights.

Follow these steps to assign supplies to a CDC.

1. Select Customer Defined Class on the Maintenance menu to open the Customer Defined Class Maintenance window.

Select a supply



2. Click ***Supply*** to open the Customer Defined Class Supply window.

3. Select a supply in the left column and click the > arrow to assign the supply to a CDC or click the >> arrows to assign all supplies to the CDC.

   You can also drag and drop supply names from one side of the window to the other.

4. Click the Save icon..

Refer to the table on page 110 for an explanation of the CDC sort columns.

Unassigning Supplies from a CDC

Follow the steps below to unassign supplies from a customer-defined class.

1. Select Customer Defined Class on the Maintenance menu to open the Customer Defined Class Maintenance window.
2. Click ***Supply*** to open the Customer Defined Class Supply window.
3. Select a supply in the right column and click the < arrow to unassign the supply from the CDC or click the << arrows to unassign all supplies from the CDC.

   You can also drag and drop supplies from one side of the window to the other.
4. Click the Save icon.

Refer to Working with Supply Details on page 293 for an alternate way to assign supplies to a customer defined class.

Deleting a Customer-Defined Class

Follow the steps below to delete a customer defined class.

1. Select a class in the Customer Defined Class Maintenance window.
2. Click Delete in the toolbar; a confirmation window appears.
3. Click ***Yes*** to confirm the deletion.
4. Click the Save icon.

Reasons

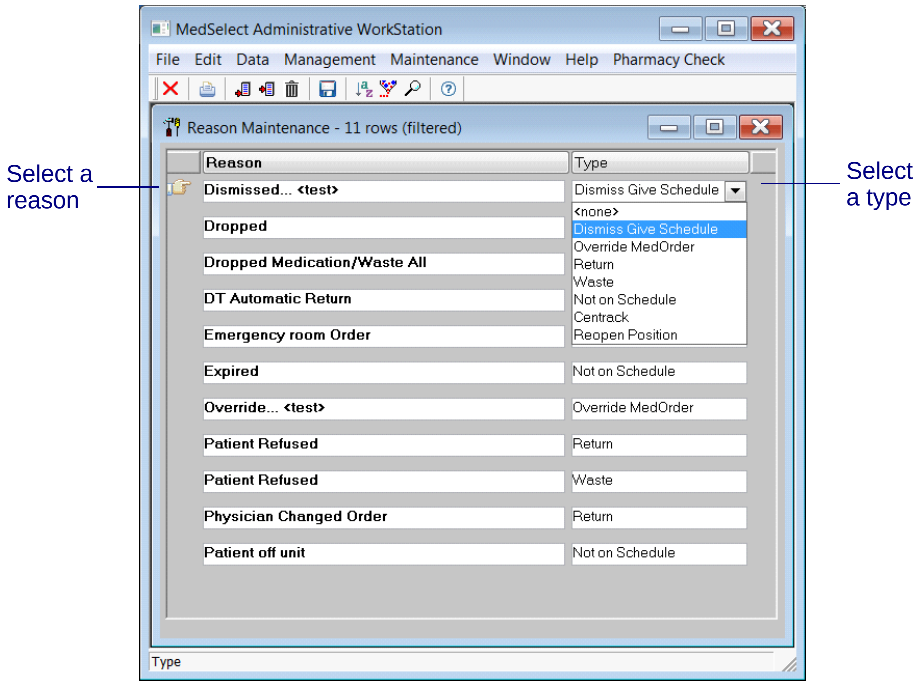
Use the Reason Maintenance function to cite reasons (explanations) when you choose to dismiss the give schedule, override a MedOrder, return, waste, or administer a medication outside the schedule. You can select reason descriptions you create at the AWS whenever you perform one of the above functions at the DT.

For example, let's say you want to provide a reason for wasting a medication because it was dropped on the floor. Type "Dropped" in the Reason column and then provide the action to be taken because of the reason, which in this case is Waste, in the Type column. Then, when you perform a waste function at the DT because you dropped a med, the Reason Maintenance window will appear and you will select the corresponding reason.

Only users with the maintenance access right can maintain reasons. Assign this right to users by selecting the Maintenance check box on the User Detail window, refer to Adding a User on page 73.

Working with Reason Maintenance

Select Reason on the Maintenance menu to open the Reason Maintenance window.



You can click the Reason column heading to sort by that column.

Adding a Reason

Follow the steps below to add a new reason.

1. Choose Reason on the Maintenance menu to open the Reason Maintenance window.
2. Click the Add icon on the toolbar of the Reason Maintenance window to open a new field in the Reason column.
3. Enter a reason description (30 characters maximum) in the field.
4. Select a type from the Type drop-down list. Select from among:
    - <none> - no reason type is given for the reason
    - Dismiss Give Schedule - used when a nurse does not dispense or give a medication to a patient (for example when a doctor orders a “hold” on a medication)
    - Override MedOrder - used when a nurse overrides a MedOrder and selects a medication from a supply list
    - Return - used when a medication is to be returned to the dispense location
    - Waste - used when a medication is to be wasted
    - Not on Schedule - used when a nurse selects a medication for dispense that is either past due or due in the future
    - Centrack - used for a Centrack-related reason

    Note: to see the drop-down list, click the entry in the Type column.

5. Click the Save icon.

Editing a Reason

Follow these steps to edit a reason.

1. Choose Reason on the Maintenance menu to open the Reason Maintenance window.
2. Select the reason you want to edit in the Reason Maintenance window.
3. Edit the reason (30 characters maximum) as necessary.
4. Click inside the Type entry to view the drop-down list of types. Select a type from the Type drop-down list. Refer to Adding a Reason on page 115 for an explanation of the various types.
5. Click Save in the toolbar.

Deleting a Reason

Follow the steps below to delete a reason.

1. Choose Reason on the Maintenance menu to open the Reason Maintenance window.
2. Select the reason you want to delete in the Reason Maintenance window.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Note: The system will not allow you to delete a reason if the reason information is required elsewhere within the MedSelect Flex system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Notes:

Physicians

Use the Physician Maintenance function to create and manage records for all physicians who order MedSelect-tracked (MedOrder) supplies. You must set up each physician within the system in order to give the physician access to the MedSelect System.

All supplies dispensed from a MedOrder are attributed to the physician who issued it.

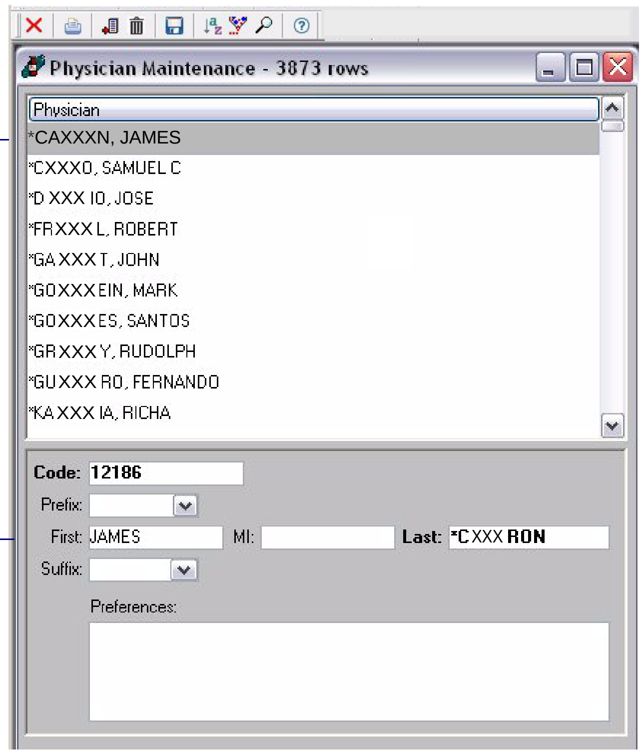
Only users with the maintenance access right can maintain physicians. Assign this right to users by selecting the Maintenance check box on the User Detail window, refer to Adding a User on page 73.

Working with Physician Maintenance

Select Physician on the Maintenance menu to open the Physician Maintenance window below.

Select a physician

Enter or edit the fields and select from the drop-down boxes in the detail window



Adding a Physician

Follow the steps below to add a physician.

1. Select Physician on the Maintenance menu to open the Physician Maintenance window.
2. Click Add in the toolbar of the Physician Maintenance window to open new fields in the detail window (bottom pane).
3. Complete the fields, referring to the table on page 122 for an explanation of the fields. Bold fields require information.
4. Click the Save icon.

   The physician's name will display at the top of the browser (top pane). You can sort the names alphabetically at any time by clicking the column header.

Editing a Physician

Follow the steps below to edit a physician.

1. Select Physician on the Maintenance menu to open the Physician Maintenance window.
2. Select a physician in the top pane of the Physician Maintenance window to view the details in the bottom pane.
3. Edit the fields as necessary, referring to the table on page 122 for an explanation of the fields. Bold fields require information.
4. Click the Save icon.

Physician Field Definitions

Refer to the following table for an explanation of each of the Physician field definitions.

Field	Explanation
Code (required)	A national registry physician code (15 characters maximum).
Prefix	A name prefix such as Mr., Mrs, Ms., etc. (4 characters maximum). Enter or select from the drop-down box.
First	The physician's first name (15 characters maximum).
MI	The middle initial (15 characters maximum).
Last (required)	The physician's last name (15 characters maximum).
Suffix	A name suffix, such as Jr., Sr., etc. (8 characters maximum). Enter or select from the drop-down box.
Preferences	Use this field to note any requirements for the physician, such as gloves, a specific supply type, etc. Nurses and technicians may wish to review this information while preparing for a procedure. (2000 characters maximum).

Deleting a Physician

Follow the steps below to delete a physician.

1. Select Physician on the Maintenance menu to open the Physician Maintenance window.
1. Select the physician you want to delete in the top pane of the Physician Maintenance window.

2. Click Delete in the toolbar; a confirmation window appears.
3. Click ***Yes*** to confirm the deletion.
4. Click the Save icon.

   The physician's name no longer appears in the top pane.

Note: The system will not allow you to delete a physician if the physician information is required elsewhere within the MedSelect system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Importing Physicians

When you initially set up your MedSelect system, you must import physician data into the MedSelect database. You can import physician data from your own database, or you can import physician data from another facility (for example an affiliate), if the other facility exports the physician data for you. The physician data includes a unique physician code and naming description for each physician. The system displays this information on the Physician Maintenance window.

A benefit to importing physician data is the reduction or elimination of manual data entry.

Note: Your site determines the order for the physician data and downloads the data into the MedSelect system during setup. ARxIUM recommends that the ARxIUM implementation team assist the site in this process during setup or when the data requires modification.

Physician Data Requirements

Physician data must meet these requirements before being imported:

- Data must exist in a flat file (text) format.
- The flat file must be tab delimited.
- The flat file must have, at minimum, the required fields listed in the following table. Other fields are optional, and all fields must not exceed the length specified in the following table.
- The flat file must have the format defined in the table below (bold fields require data).
- The physician code must be unique.

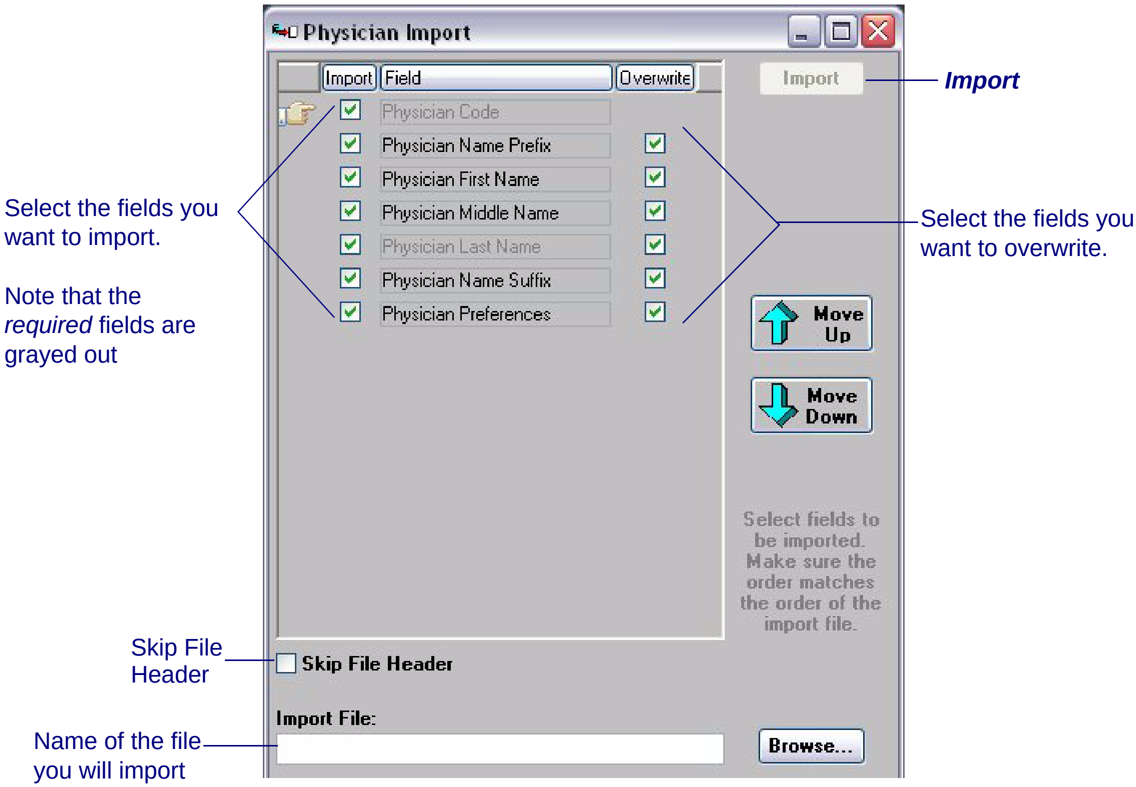
Note: The system updates existing records with new information when you add new records to the database.

Field Name	Type	Length
Physician Code (required)	Char	15
Physician Name Prefix	Char	4
Physician First Name	Char	15
Physician Middle Name	Char	15
Physician Last Name (required)	Char	15
Physician Name Suffix	Char	8
Physician Preferences	Char	2000

Importing Physicians

After your data meets all the requirements described in the previous section, follow the steps below to import physicians.

1. Select Physician Import on the Management menu to open the Physician Import window.



2. Turn off any fields that are not part of the data by removing the check in the Import box, to the left of the field.

Note: No new records will be added if a non-required field is cleared. Instead, only existing records will be updated. Required fields (grayed out) cannot be cleared - a prompt will alert you if you attempt to clear a required field.

3. Arrange the order of the fields to match the order of the physician import file. Select the field to move it up or down. Then click ***Move Up*** or ***Move Down***, or drag and drop the field to a new location in the list.
4. Check the Overwrite box to the right of any field you want to overwrite with imported values. Leave it clear to preserve the existing value in the database.
5. Click ***Browse*** to locate and select the file, which will then display in the Import File text box.
6. Select the Skip File Header box to ignore any header information in the file.
7. Click ***Import*** to import data into the database.

   A progress window displays to show the status of the import. When finished, the number of successful and failed imports displays. For failed imports, you can either continue or stop importing.

8. Select Data on the toolbar of the AWS main window, then select Save Column Format to save the format you used (that is, the order of fields).

   You can also save the format when you close the window; a prompt will ask if you want to save the format you used (that is, the order of fields). Choose Yes to preserve this format. Or choose No, to open the list in its default format the next time you use the import function.

Locations

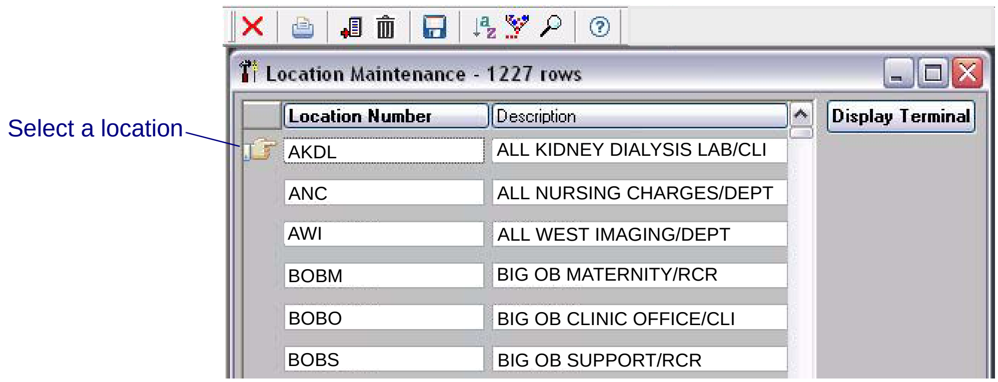
Location names display on DTs; DT users use the locations when dispensing items. Use Location Maintenance to enter location names for all locations that contain MedSelect devices, patient care areas, and patient rooms.

After you add locations, assign DTs to them. Patient names display on DTs in the locations that you create.

AWS users must have the maintenance access right to maintain locations. Refer to Adding a User on page 73.

Working with Location Maintenance

Select Location on the Maintenance menu to open the Location Maintenance window below.



Click either column to sort by that column.

Adding a Location

Follow the steps below to add a location.

1. Select Location on the Maintenance menu to open the Location Maintenance window.
2. Click the Add icon on the toolbar of the Location Maintenance window to open a new field.

Note: The location number must be unique.

3. Complete the fields. Bold fields require information.

   Refer to the table on page 131 for an explanation of the fields.

4. Click the Save icon.

   After you add a location, you can assign DTs to it. To do this, refer to Assigning Display Terminals to Locations on page 131.

Adding a Range of Locations

You may want to add a range of locations that include multiple locations listed in sequence on the Location Maintenance window. To do this, follow the steps below.

1. Select Location on the Maintenance menu to open the Location Maintenance window.
2. Select Data, then Add range on the main window toolbar.
3. Enter the name of the lowest room number in the Beginning Location Number field, and the highest room number in the Ending Location Number field.

   You can enter any combination of numbers and letters. The automatic sequencing is based on the first string of unrepeated numbers found in your entry. For instance, if you enter Room5-1B as the beginning number and Room5-12B as the ending number, the system bases its sequencing on the numbers 1 through 12, ignoring everything to the right and left of 1 and 12. After Room5-1B, the first location generated would be Room5-2B, followed by Room5-3B,etc.

   The system can add leading zeros to make your start number and end number consistent. For instance, if your start number is Room001 and your end number is Room10, the system can change the end number to Room 010 so that the leading zeros are matched.

If your locations include leading zeros, a prompt appears asking if you want to use the zeros. If you choose No, the zeros are dropped from the location number.

4. Select Skip Every Other Number to skip every other combination and allow even or odd strings.
5. Select Use This Description for All to give the same description to all locations.
6. Select Description Same As Number to make the description identical to the location number.
7. Click ***OK*** to generate the new locations.

Editing a Location

Follow the steps below to edit a location.

1. Select Location on the Maintenance menu to open the Location Maintenance window.
2. Select a location on the Location Maintenance window.
3. Edit the fields as necessary. Bold fields require information.

   Refer to the table on page 131 for an explanation of the fields.
4. Click the Save icon.

   After you edit the information in the Location

Maintenance window, you can assign or unassign DTs to or from the location. To do this, refer to Assigning Display Terminals to Locations on page 131 and Unassigning a DT from a Location on page 133.

Location Field Definitions

Refer to the following table for an explanation of each of the location fields.

Field	Explanation
Location Number (required)	A unique number (or descriptive name) that identifies the location (16 characters maximum).
Description	A description that you can use to help you identify the location (30 characters maximum). This description only appears on the Location Maintenance window.

Assigning Display Terminals to Locations

You must have the maintenance right to assign DTs to a location. See Adding a User on page 73 for setting rights.

When you assign a DT to a location, the DT only displays records for patients who are assigned to that same location. However, a user at a DT can find a patient in any location by using the DT's Find/Add feature.

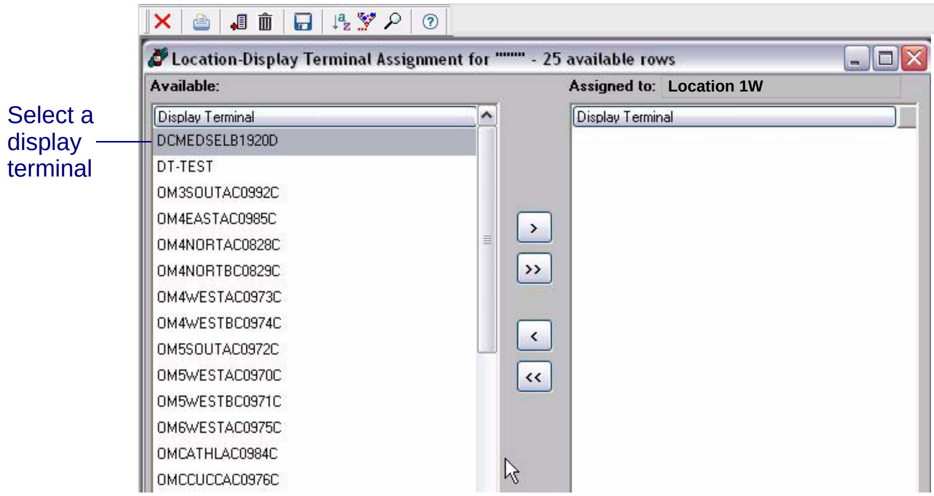
If the DT name is followed by "Default", then the location is the default location for that DT (that is, the location where the DT resides). The DTs in the Location Display Terminal Assignment window are set in Setting Display Terminal App Type Properties on page 191.

Follow these steps to assign a display terminal to a location.

1. Select Location on the Maintenance menu to open the Location Maintenance window.
2. Select a location on the Location Maintenance window.
3. Click ***Display Terminal*** to open the Location Display Terminal Assignment window for that location.
4. Select a DT in the left column and click the > arrow to assign the DT to the selected location or click the >> arrows to assign all DTs to the location.

   You can also drag and drop DTs from one side of the window to the other.

5. Click the Save icon.



Location Display Terminal Assignment window

Unassigning a DT from a Location

Follow the steps below to unassign a DT from a location.

1. Select Location on the Maintenance menu to open the Location Maintenance window.
2. Select a location on the Location Maintenance window.
3. Click ***Display Terminal*** to open the Location Display Terminal Assignment window for that location.
4. Select a DT in the right column and click the < arrow to unassign the DT from a location or click the << arrows to unassign all DTs from the location.

You can also drag and drop DTs from one side of the window to the other.

5. Click the Save icon.

Deleting a Location

Follow the steps below to delete a location.

1. Select a location on the Location Maintenance window.
2. Click Delete in the toolbar; a confirmation window appears.
3. Click ***Yes*** to confirm the deletion.
4. Click the Save icon.

Importing Locations

When you initially set up your MedSelect Flex system, you must import locations into the MedSelect Flex database. The location data includes a location number and description for each location. The system displays this information on the Location Maintenance window.

Note: Your site determines the order of the import data; you download the data into the MedSelect Flex system during setup. ABTG recommends that the ABTG implementation team assists you with this process during initial setup and when you need to modify the data.

Location Data Requirements

Location data must meet these requirements before being imported:

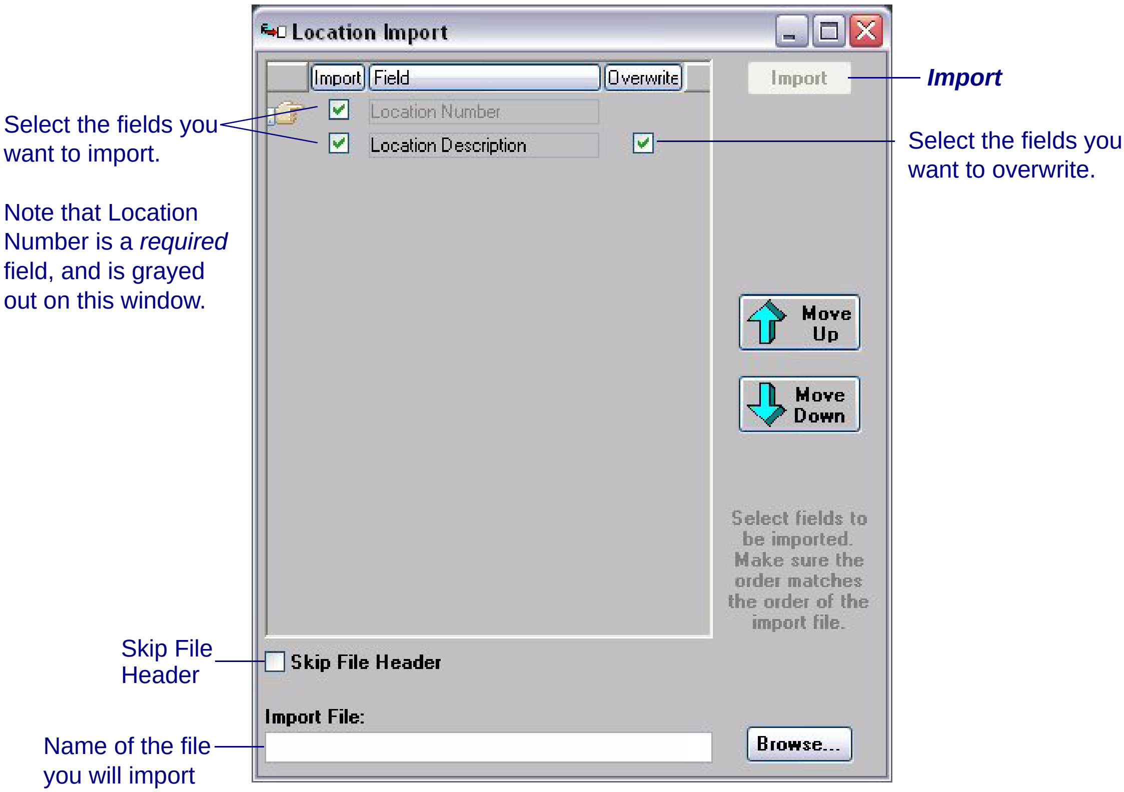
- Data must exist in a flat file (text) format.
- The flat file must be tab delimited.
- The flat file must have, at minimum, the required fields listed in the following table. Other fields are optional, and all fields must not exceed the length specified in the following table.
- The location number must be unique, but can be either a number or a descriptive name. Existing records can be updated with new information. New records are added to the database.
- For new locations, if no location description is provided, then Location Description = Location Number.
- The flat file must have the format defined in the following table (bold fields require data).

Field Name	Type	Length
Location Number (required)	Char	16
Location Description	Char	30

Importing Locations

After your data meets all the requirements described in the previous section, follow the steps below to import locations.

1. Select Location Import on the Management list to open the Location Import window.



2. Turn off any fields that are not part of the data by removing the check in the Import box to the left of the field.

Note: No new records will be added if you clear a non-required field. Instead, only existing records will be updated. You cannot clear a required field (grayed out); a prompt will alert you if you attempt to clear a required field.

3. Arrange the order of the fields to match the order of the location import file. Select a field to move it up or down. Then click ***Move Up*** or ***Move Down***, or drag and drop the field to a new location in the list.
4. Check the Overwrite box to the right of any field you want to overwrite with imported values. Uncheck the box to preserve the existing value in the database.
5. Click ***Browse*** to locate and select the file you want to import, which will display in the Import File text box.
6. Select the Skip File Header box to ignore any header information in the file.
7. Click ***Import*** to import the file into the database.

   A progress window displays to show the status of the import. When finished, the number of successful and failed imports displays. For failed imports, you can either continue or stop importing.

8. Select Data on the toolbar of the AWS main window, then select Save Column Format to save the format you used (that is, the order of fields).

   You can also save when you close the window. A prompt will ask if you want to save the format you used (that is, the order of fields). Choose Yes to preserve this format. Or choose No, to open the list in its default format the next time you use the import function.

Notes:

Routes

Routes are the means by which a medication is administered to a patient, for example, intravenous, nasal, or transdermal. Your MedSelect system comes with routes set up, including a list of HL7 standard routes (see page 140).

When users dispense medications from a DT, routes may display. Users select routes, when appropriate, for documentation purposes only.

AWS users must have the maintenance access right to maintain routes. Assign this right to AWS users by selecting the maintenance check box on the User Detail window. Refer to Adding a User on page 73.

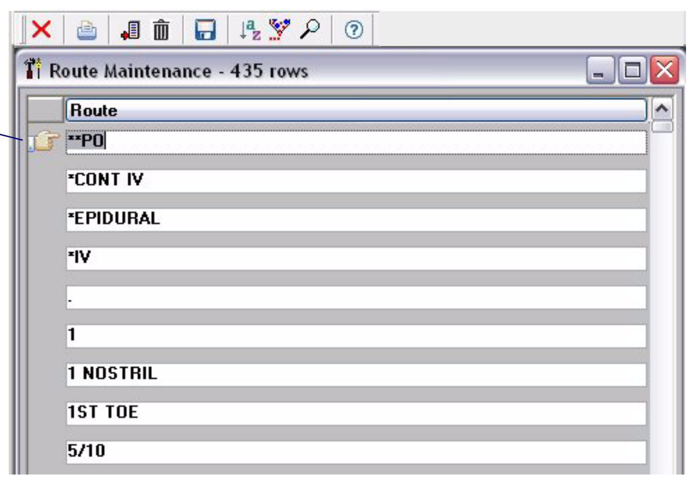
HL7 Standard Route Names

HL7 Standard Route Names				
Apply Externally	Intracardiac	Intraperitoneal	Ophthalmic	Topical
Buccal	Intradermal	Intrasynovial	Otic	Transdermal
Dental	Inhalation	Intrathecal	Oral	Translingual
Gastronomy Tube	Intramuscular	Intravenous	Rectal	Urethral
GU Irrigant	Intranasal	Nasal	Subcutaneous	Vaginal
Intra-arterial	Intraocular	Nasogastric	Sublingual	------------------------

Working with Route Maintenance

Select Route on the Maintenance menu to open the Route Maintenance window shown below.

Select a route



Adding a Route

Follow the steps below to add a route.

1. Select Route on the Maintenance menu to open the Route Maintenance window.
2. Click the Add icon on the toolbar of the Route Maintenance window.
3. Enter a route description (30 characters maximum) in the new row.
4. Click the Save icon.

Editing a Route

Follow the steps below to edit a route.

1. Select Route on the Maintenance menu to open the Route Maintenance window.
2. Select the route you want to edit.
3. Edit the field as necessary.
4. Click the Save icon.

Deleting a Route

Follow the steps below to delete a route.

1. Select Route on the Maintenance menu to open the Route Maintenance window.
2. Select the route you want to delete.
3. Click the Delete icon; a confirmation window appears.

4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Sig Codes

During your system setup, your ARxIUM implementation specialist will import standard sig codes. Use the Sig Code Maintenance function to work with sig codes, adding, editing, deleting, and importing them. DT users will use sig codes with MedOrder systems only.

MedSelect Sig Code Types

There are two sig code types:

- Continuous - A continuous sig code is one whose doses are given continuously around the clock based on the dose increment times.
- Non-continuous - A non-continuous sig code is one whose doses are not given continuously around the clock based on the dose increment times. Instead, doses start over each day at the start default time, and stop

each day when the last increment in the definition is reached. The non-continuous label pertains to how the sig code is scheduled for a particular day.

MedSelect Sig Code Categories

In order to accommodate hospital sig codes, MedSelect has created categories into which the continuous and non-continuous sig code types are grouped. They are as follows:

Hourly Sig Code

A MedSelect hourly sig code is a frequency that has a specific interval for which it continually repeats. One interval is expected and the doses are based on the MedOrder start time. An order that is created as an hourly with an interval of ‘x’ will have the first dose at the start time and will be repeated every ‘x’ number of hours. An hourly sig code is synonymous with a continuous sig code.

Daily Sig Code

A MedSelect daily sig code is a frequency that has specific administration times per day. A daily sig code is synonymous with a non-continuous sig code. The doses start over each day, beginning with the default start time, and stop each day once the last increment is reached. The process is repeated the following days until the MedOrder stop date is reached or the order is cancelled.

Note: A sig code of Q8H (every eight hours) appears to be an hourly sig code. If, however, you defined it with a give schedule of 0400, 1200, 2000, then it should be set up as a daily sig code with a repeat interval of 24.

Weekly Sig Code

Weekly sig codes are frequencies that fall on specific days. There is no limit to the number of doses you can set up for a particular day; however, each of the days defined in the weekly sig will have the same number of doses. For example, if you define weekly sig code to be given on Monday, Wednesday, and Friday and the default hours are 0900 and 2100, the order will be given at 0900 and 2100 on each of those days. Default hours cannot be different for any of the specified days.

Monthly Sig Code

Monthly MedSelect sig codes are frequencies that fall on specific days of the month. Typically, many drugs are set up for Q30D (every 30 days). However, some institutions may prefer to administer the drugs on the 15th and 28th of every month. The MedSelect system offers this flexibility.

PRN Status

PRN status is set by a flag sent with an order from the pharmacy MedOrder interface. If this flag is not available on your pharmacy system, then you must negotiate the PRN status with the interface engineer.

Stat Flag

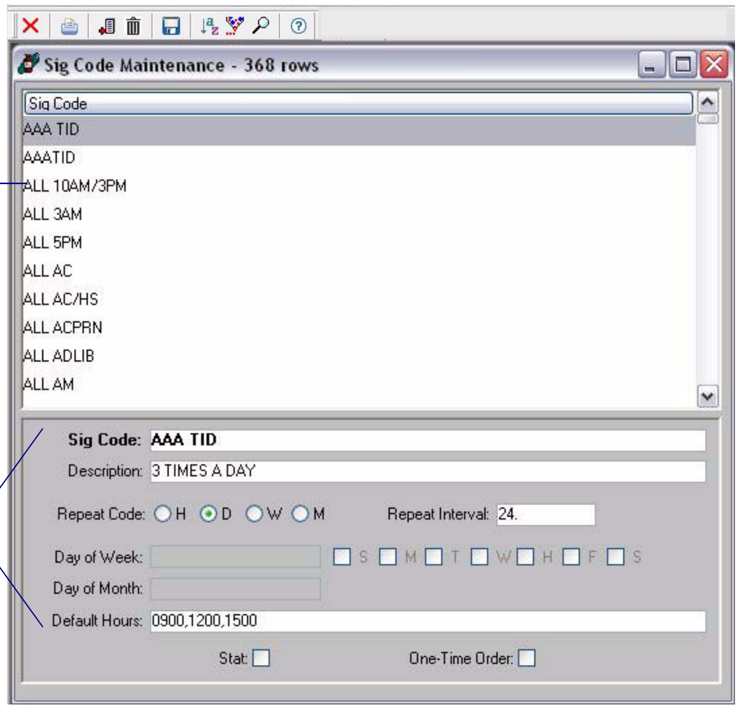
Your pharmacy system may use a stat flag when a sig code is set as stat. The stat flag is best suited for daily sigs which you administer at pre-defined times, and when the nurse needs to administer a drug immediately, which the pre-defined schedule cannot accommodate.

Working with Sig Codes

Select Sig Code on the Maintenance menu to open the Sig Code Maintenance window shown below.

Select a sig code

Enter information and select options



Click the Sig Code column header to sort the sig codes alphabetically by name.

Adding a Sig Code

Follow the steps below to add a sig code.

1. Select Sig Code on the Maintenance menu to open the Sig Code Maintenance window.
2. Click Add on the toolbar of the Sig Code Maintenance window
3. Complete the fields. Bold fields require information.

   Refer to the table on page 148 for an explanation of the field definitions.

4. Click the Save icon.

Editing a Sig Code

Follow the steps below to edit a sig code.

1. Select Sig Code on the Maintenance menu to open the Sig Code Maintenance window.
2. Select the sig code you want to edit.
3. Edit the fields as necessary, referring to the table on page 148 for an explanation of the field definitions. Bold fields require information.
4. Click the Save icon.

Sig Code Field Definitions

Refer to the following table for an explanation of each of the sig code fields as displayed on the Sig Code Maintenance window.

Field	Explanation
Sig Code (required)	Unique text identifying the sig code.
Description	Describes what the sig code means.
Repeat Code	Specifies the repeat sequence for the give schedules (H=Hourly, D=Daily, W=Weekly, M=Monthly).
Repeat Interval	Specifies how often the give record sequence is repeated.
Day of Week	Specifies the day(s) of the week the medication should be administered.
Day of Month	Specifies the day(s) of the month the medication should be administered.
Default Hours	Specifies the administration times (military) associated with this sig code.
Stat	If checked, indicates medication should be given immediately.
One-Time Order	If checked, indicates the medication should be given one time only.

Deleting a Sig Code

Follow the steps below to delete a sig code.

1. Select Sig Code on the Maintenance menu to open the Sig Code Maintenance window.
2. Select the sig code you want to delete.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Note: The system will not allow you to delete a sig code if the sig code information is required elsewhere within the MedSelect Flex system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Importing Sig Codes

When you initially set up your MedSelect Flex system, you must import sig codes into the MedSelect Flex database. You can import sig code data from another facility, if that facility exports the data for you. The sig code data includes a unique sig code name, and give times and intervals for each sig code. The system displays this information on the Sig Code Maintenance window.

A benefit to importing sig code data is the reduction or elimination of manual data entry.

Note: Your site determines the order for the sig code data and downloads it into the MedSelect Flex system from the site database during setup. ABTG recommends that the ABTG implementation team assist the site in this process during setup or when the data requires modification.

Sig Code Data Requirements

Sig code data must meet these requirements before being imported:

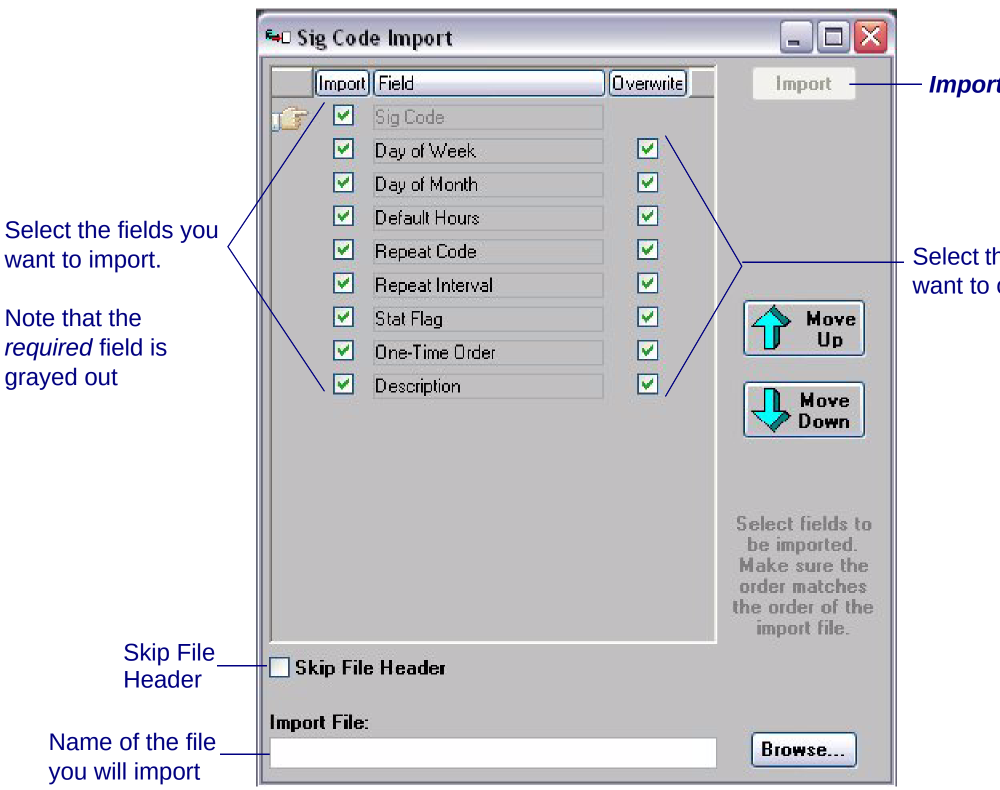
- Data must exist in a flat file (text) format.
- The flat file must be tab delimited.
- The flat file format must be as shown in the table below (bold fields require data).
- The flat file must have, at minimum, the required fields listed in the following table. Other fields are optional, and all fields must not exceed the length specified in the following table.
- The sig code must be unique. The system can update existing records with new information and add new records to the database:

Field Name	Type	Length
Sig Code (required)	Char	60
Day of Week	Char	24
Day of Month	Char	20
Default Hours	Char	255
Repeat Code	Char	1
Repeat Interval	Number	N/A

Field Name	Type	Length
Stat Flag	Char	1
One-Time Order	Char	1
Description	Char	60

Importing Sig Codes

After your data meets all the requirements described in the previous section, follow the steps below to import sig codes. Begin by selecting Sig Code Import on the Management list to open the Sig Code Import window shown below.



1. Turn off any fields that are not part of the data by removing the check in the Import box to the left of the field name.

Note: No new records will be added if a non-required field is cleared. Instead, only existing records will be updated. Required fields (grayed out) cannot be cleared - a prompt will alert you if you attempt to do so.

2. Arrange the order of the fields to match the order of the sig code import file. Select a field to move it up or down. Then click ***Move Up*** or ***Move Down***, or drag and drop the field to a new location in the list.
3. Check the Overwrite box to the right of any field you want to overwrite with imported values. Clear the box to preserve the existing value in the database.
4. Click ***Browse*** to locate and select the file you want to import. The file name will display in the Import File text box.
5. Select the Skip File Header box to ignore any header information in the file.
6. Click ***Import*** to import data into the database.

   A progress window displays to show the status of the import. When finished, the number of successful and failed imports displays. For failed imports, you can either continue or stop importing.

7. Select Data on the toolbar of the AWS main window, then select Save Column Format to save the format you used (that is, the order of fields).

   You can also save when you close the window. A prompt will ask if you want to save the format you used (that is, the order of fields). Choose Yes to save this format. Or choose No, to open the list in its default format the next time you use the import function.

Notes:

Site Maintenance

Sites are locations on the body where treatments are administered, such as eyes, ears, or intramuscular locations. Your MedSelect system comes with pre-populated site information. Users may choose sites when dispensing from the DT, depending on the item being dispensed. Refer to page 156 for a list of sites.

Only users with the maintenance access right may maintain sites. You can assign this right to a user by selecting the maintenance check box on the User Detail window, refer to Adding a User on page 73.

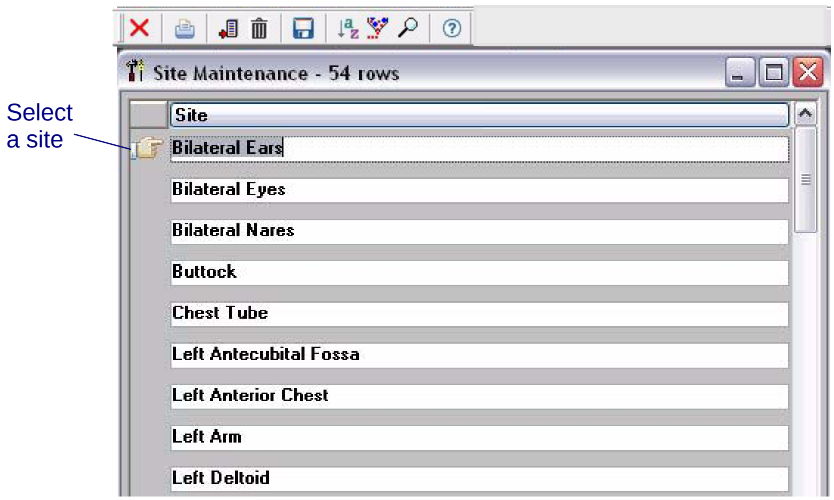
Body Location Sites

The following sites are pre-loaded in the database.

Body Site Names				
Bilateral Ears	Left Eye	Left Thigh	Right Deltoid	Right Posterior Chest
Bilateral Eyes	Left Foot	Left Upper Arm	Right Ear	Right Subclavian
Bilateral Nares	Left Gluteus Medius	Left Upper Abd Quandrant	Right External Jugular	Right Thigh
Buttock	Left Hand	Left Ventragluteal	Right Eye	Right Upper Arm
Chest Tube	Left Internal Jugular	Left Vastus Lateralis	Right Foot	Right Upper Abd Quandrant
Left Arm	Left Lower Abd Quadrant	Nebulized	Right Gluteus Medius	Right Upper Forearm
Left Anterior Chest	Left Lower Forearm	Perianal	Right Hand	Right Vastus Lateralis
Left Antecubital Fossa	Left Mid Forearm	Perineal	Right Internal Jugular	Right Ventragluteal
Left Deltoid	Left Naris	Right Arm	Right Lower Abd Quandrant	_ _ _ _ _ _ _ _ _ _
Left Ear	Left Posterior Chest	Right Anterior Chest	Right Lower Forearm	_ _ _ _ _ _ _ _ _ _
Left External Jugular	Left Subclavian	Right Antecubital Fossa	Right Naris	_ _ _ _ _ _ _ _ _ _

Working with Site Maintenance

Select Site on the Maintenance menu to open the Site Maintenance window below.



Adding a Site

Follow the steps below to add a site.

1. Select Site on the Maintenance menu to open the Site Maintenance window.
2. Click the Add icon on the toolbar of the Site Maintenance window.

3. Enter a site description (30 characters maximum) in the new row.
4. Click the Save icon.

Editing a Site

Follow the steps below to edit a site.

1. Select Site on the Maintenance menu to open the Site Maintenance window.
2. Select the site you want to edit.
3. Edit the field as necessary.
4. Click the Save icon.

Deleting a Site

Follow the steps below to delete a site.

1. Select Site on the Maintenance menu to open the Site Maintenance window.
2. Select the site you want to delete.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Note: The system will not allow you to delete a site if the site information is required elsewhere within the MedSelect Flex system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Kits

You can use kits as a convenient way to dispense picklist groups of supplies. Kits are found in outpatient facilities as well as inpatient facilities for standing orders. Kits are not assigned as a MedOrder.

Kits must be assigned to a department; all DTs in that department will see the associated kits. You must create a new kit name for a kit that has the same items as another kit but will be assigned to a different department.

When a user at a DT chooses to dispense a kit, every item assigned to the kit is automatically dispensed unless an item is out of stock. In that case, all other items in the kit will dispense.

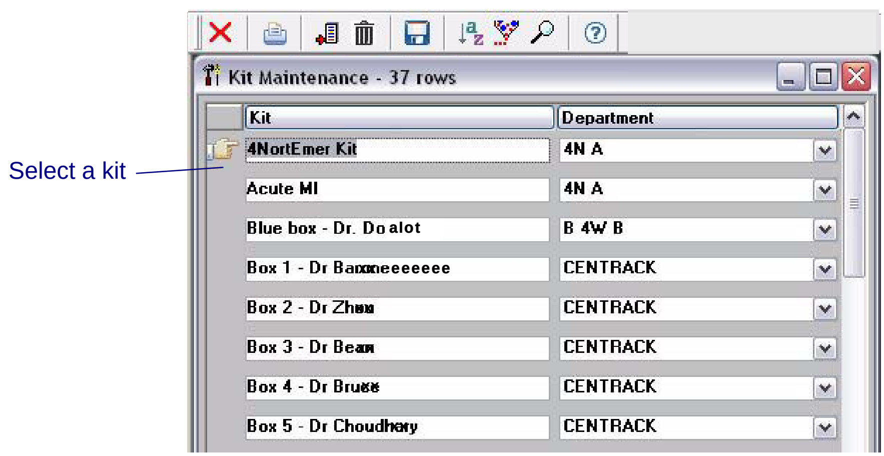
You must have the inventory right to assign/unassign kits and change kit supply quantities. You must have the maintenance right to create, edit, and delete a kit. See Adding a User on page 73 for setting rights.

There are two separate functions to perform when working with kits. They are:

- Using Kit Maintenance to create kit names and assign them to departments (see Working with Kits below).
- Using Kit Assignment to assign/unassign supplies to/from kits and change kit supply quantities (see page 161, page 164, and page 165, respectively).

Working with Kits

Select Kit on the Maintenance menu to open the Kit Maintenance window below.



Click either column to sort by that column.

Creating/Adding a Kit

Follow the steps below to create/add a kit.

1. Select Kit on the Maintenance menu to open the Kit Maintenance window.
2. Click the Add icon on the toolbar of the Kit Maintenance window to open new fields.
3. Enter the new kit name.
4. Select a department to which you want to assign the kit, from the drop-down box.

   Refer to the table on page 165 for an explanation of the fields.

5. Click the Save icon.

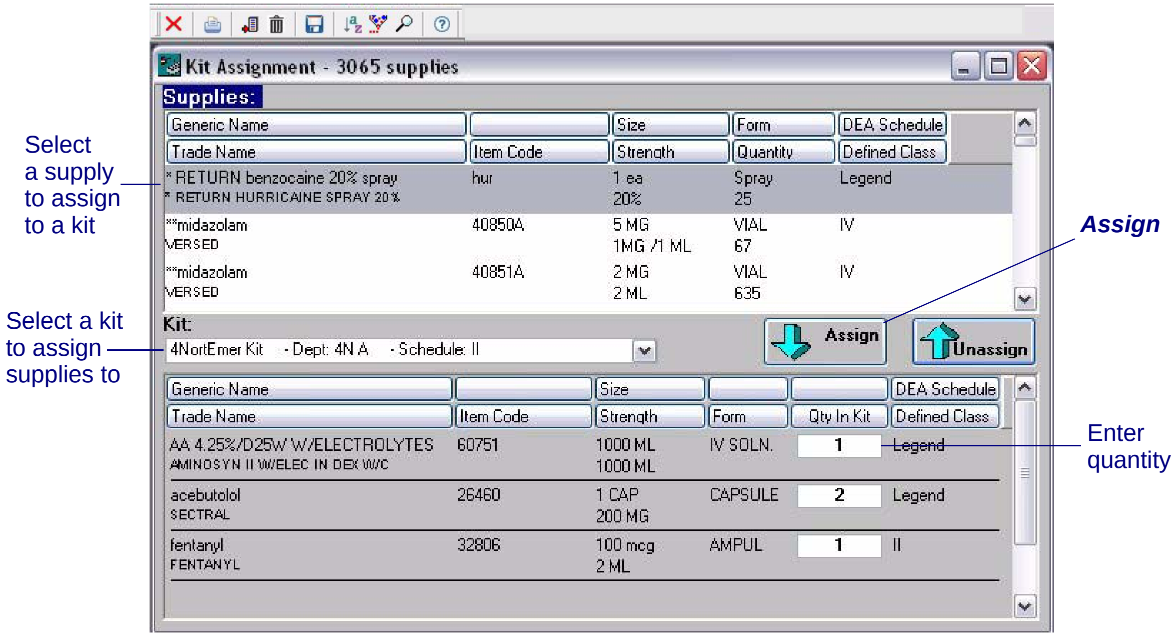
   After you add a kit, you can assign supplies to it. To do this, refer to Assigning Supplies in the following section.

Assigning Supplies to a Kit

You must have the inventory right to assign supplies to a kit. See Adding a User on page 73 for setting rights.

Follow these steps to assign supplies to a kit.

1. Select Kit Assignment on the Management menu to open the Kit Assignment window shown in the following figure.



The Kit Assignment window contains two browsers. The top browser is a supply browser. The bottom browser shows all of the supplies contained within the selected kit.

2. To ensure that the data in the supply browser is current, open the Data menu, and then choose the Refresh Browser option.
3. View supply details, if desired.
   a. Right-click on the name of a supply listed in the browser or displayed in the assigned list of the Kit Assignment window. A pop-up window will display.
   b. Click ***Details*** to open the supply detail window.

c. Close the supply detail window after viewing.

4. Select the kit to which you want to assign supplies from the Kit drop-down box (bottom pane) in the Kit Assignment window.
5. Select a supply in the Supplies browser (top pane) to assign to the kit.

Note: Select multiple non-consecutive supplies by pressing the Ctrl key and selecting each supply. Select multiple consecutive supplies by selecting the first supply, pressing the Shift key, and selecting the last supply.

6. Click ***Assign*** to place the supply/supplies into the kit.

   You can also drag and drop supply names from the top of the window to the bottom and vice versa.

7. Click in the Qty In Kit field and enter the quantity of the supply you are adding to the kit.
8. Click Save in the toolbar.

   If there are supplies with a DEA schedule in the kit when the kit is saved, the kit is given a DEA schedule, which will reflect the highest DEA schedule of the supplies in the kit.

Editing a Kit

Follow the steps below to edit a kit.

1. Select Kit on the Maintenance menu to open the Kit Maintenance window.
2. Select the kit you want to edit.
3. Edit the kit field as necessary and select a different department as necessary.

   Refer to the table on page 165 for an explanation of the fields.

4. Click the Save icon.

   After you edit the information in the Kit Maintenance window, you can assign or unassign supplies to or from the kit or change the kit supply quantities. To do this, refer to Assigning Supplies to a Kit on page 161, Unassigning Supplies from a Kit on page 164, and Changing Kit Supply Quantities on page 165.

Unassigning Supplies from a Kit

Follow the steps below to unassign supplies from a kit.

1. Select Kit Assignment on the Management menu to open the Kit Assignment window.
2. Select a kit from the Kit drop-down box (bottom pane).
3. Select a supply to unassign from the kit.

Note: Select multiple non-consecutive supplies by pressing the Ctrl key and selecting each supply. Select multiple consecutive supplies by selecting the first supply, pressing the Shift key, and selecting the last supply.

4. Click ***Unassign*** to remove a supply from the kit.

Changing Kit Supply Quantities

Follow the steps below to change the kit supply quantity.

1. Select Kit Assignment on the Management menu to open the Kit Assignment window.
1. Click in the Qty In Kit field and enter the new quantity of the supply that will be in the kit.
2. Click the Save icon.

Kit Field Definitions

Refer to the following table for an explanation of each of the kit fields.

Field	Explanation
Kit	A name that describes the group of supplies (30 characters maximum).
Department	The department in which this kit is available.

Deleting a Kit

You must unassign supplies before you can delete a kit. To do this, refer to Unassigning Supplies from a Kit on page 164.

Follow the steps below to delete a kit.

1. Select a kit on the Kit Maintenance window.
2. Unassign the kit supplies.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Note: Deleting a kit does not delete the kit's supplies from the database. Those supplies remain in the database, but they no longer have a kit assignment.

Note: The system will not allow you to delete a kit if the kit information is required elsewhere within the MedSelect Flex system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Pharmacy Check

The pharmacy check feature allows dispensing of a medication, based on a physician's verbal order. For example, a physician verbally approves an order for a medication, but the physical prescription has not yet arrived at the pharmacy. If the medication has been set up within AWS as a pharmacy check item, the user calls the pharmacy for a unique, one-time approval code prior to dispensing. This chapter explains how to set up pharmacy check and describes the implications of setup options.

In general, to use pharmacy check, you must set up a supply to be pharmacy check required, and set up a DT to support pharmacy check functionality. When these options have been set up, users will be required to enter a pharmacy approval code prior to dispensing the pharmacy check supply.

There are two ways to use pharmacy check: automatic mode or manual mode. Depending on the mode you want to use, there are different setup options for using pharmacy check. When using automatic pharmacy check, the system is set up to produce a pharmacy approval code which the system verifies. In manual mode, the approval code is not generated by AWS and is not verified.

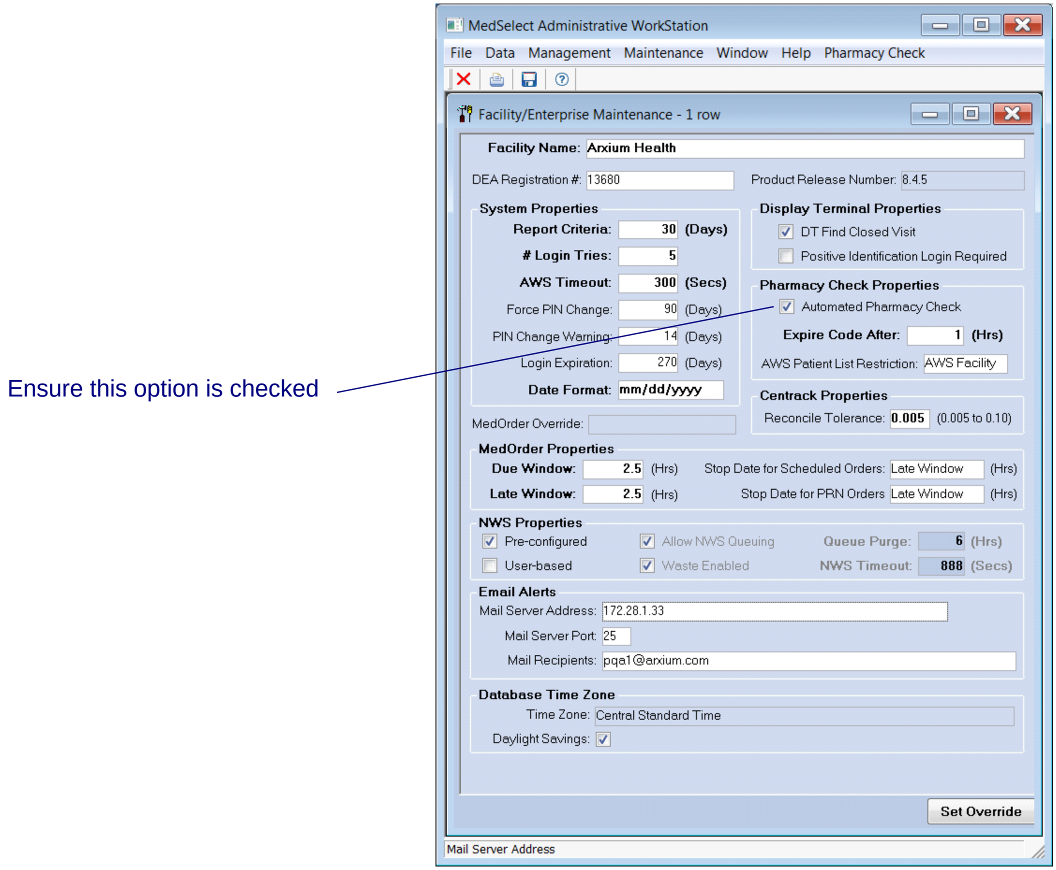
Setting Up Pharmacy Check

You can set up the Pharmacy Check feature in any of a number of ways to best meet your needs. The steps below describe a basic setup. However, if your system comprises multiple facilities and multiple departments and you want all facilities to use Pharmacy Check, you may wish to seek the advice of ARxIUM support for assistance. Call 800-477-2750, then select option 2.

Follow these steps to set up Pharmacy Check.

1. If you want to use *automatic* mode, select Facility from the Maintenance menu at the top of the AWS main window. The Facility Maintenance window appears.

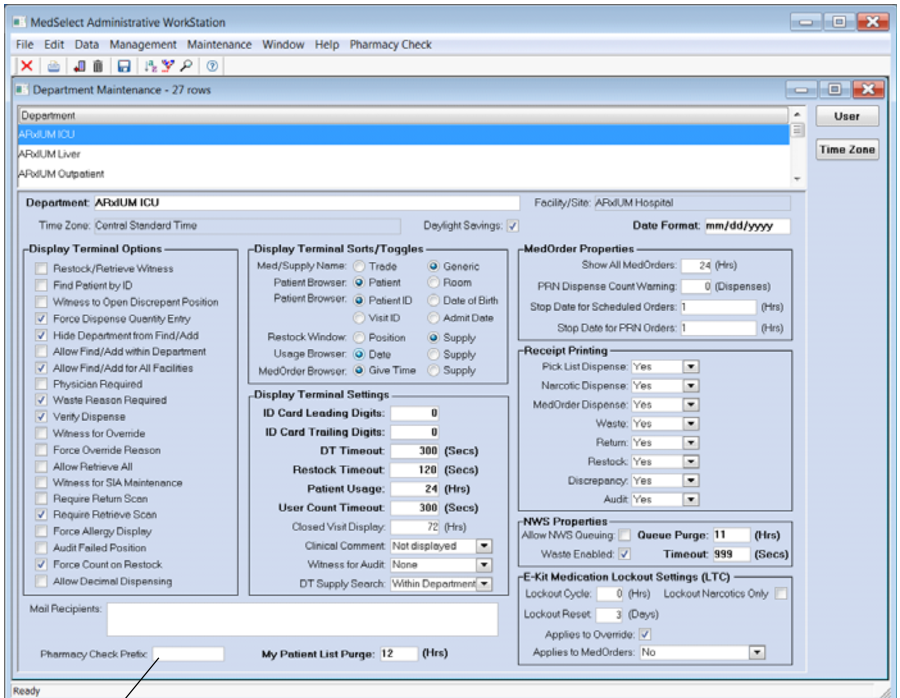
2. Check the Automated Pharmacy Check option.



3. Specify a period of time (in hours), after which any approval code expires, in the Expire Code After field. An hour is the default value.

   When this option is set up, and the user has the pharmacy check access right (see step 8), the Pharmacy Check menu appears at the top of the AWS main window.

4. If you choose to use *automatic* mode, click Department on the Maintenance menu to open the DT Department Maintenance window.



Pharmacy Check prefix field

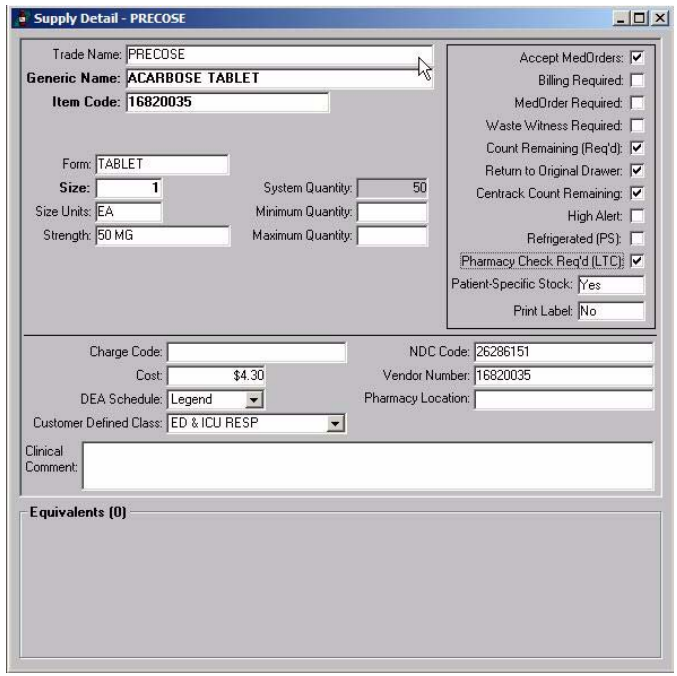
5. On this window you can type a pharmacy check prefix, if desired.

   In a long term care environment, users may have multiple facilities and multiple pharmacies. Adding a prefix to a pharmacy check approval code may help users determine which pharmacy is generating codes.

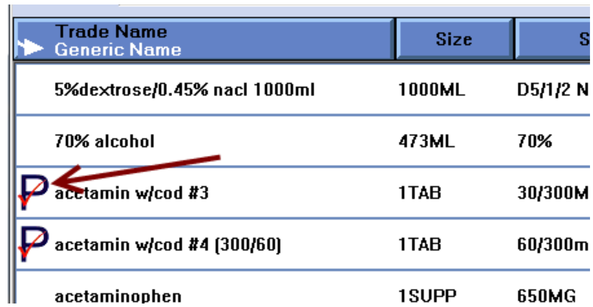
6. Next, set up the client.
    a. Select Configuration on the Maintenance list.
    b. Select Client to open the Client Configuration window.
    c. Select a DT on the Client Configuration window.
    d. Select a Display Terminal field under the App Type column heading on the Client Configuration window.
    e. Click Properties to open the Display Terminal App Type window.
    f. Use the pharmacy check toggle to select the type of order to which you want to apply the pharmacy check feature. Choose from among: All dispenses, None, Picklist dispenses, or MedOrder dispenses.

       Note: If you choose All dispenses, Picklist dispenses, or MedOrder dispenses, and you leave the pharmacy check option on the Facility Maintenance window unchecked, you are using the manual mode of operation. When operating in *manual* mode, users who call the pharmacy for an approval code, must type both the approval code and the pharmacist information in the corresponding fields on the Pharmacy Check browser.

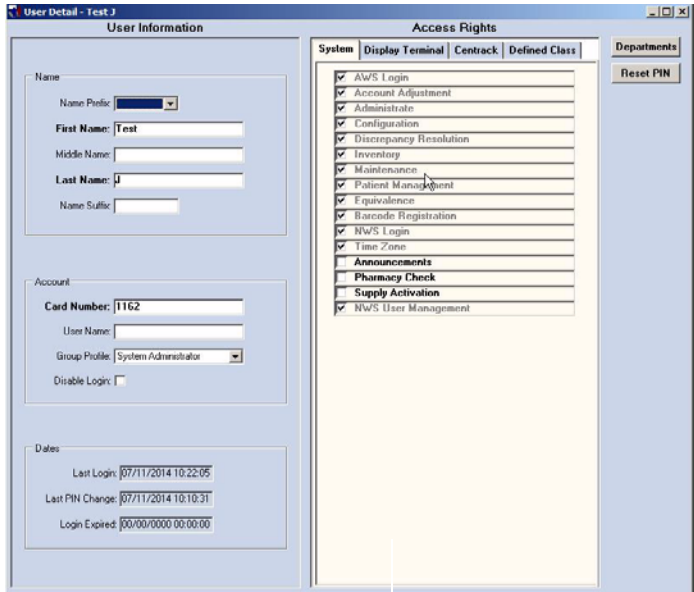
7. Next, set up items to be dispensed for pharmacy check, by selecting a supply on the Supply browser and then clicking ***Details***. When the Supply Detail window appears, ensure that the Pharmacy Check Required option is checked.



When checked, the supply is tagged with an icon when it appears on the Supply Browser or the MedOrder Browser, as shown in the following figure, and the user is prompted to contact the pharmacy for an approval code.



8. Last, set up users to work with the Pharmacy Check Browser.
   a. Choose User on the Maintenance menu.
   b. Choose User Browser to open the User Browser.
   c. Select the user row to whom you want to assign pharmacy check rights.
   d. Click ***Details*** or double-click a row to open the User Detail window.



e. Ensure the Pharmacy Check option is checked.

Working with the Pharmacy Check Browser

After you have set up all the pharmacy check options, you are ready to work with the Pharmacy Check Browser.

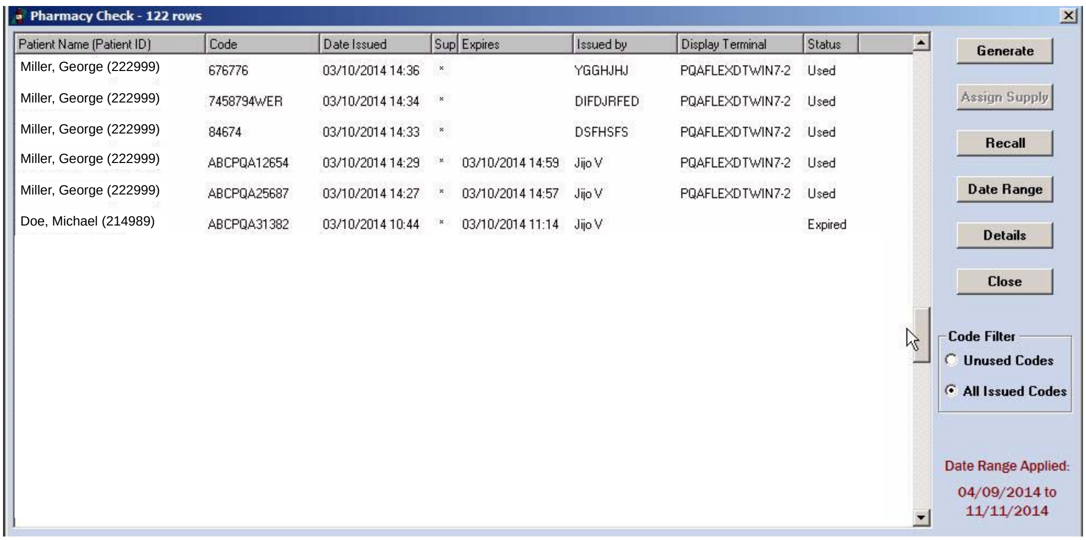
Note: The Pharmacy Check Browser only appears if you have set up your system for the pharmacy check automatic mode.See steps 1 and 4 above.

Note: The patient list and issued code list reflect the scope specified in the Facility/Enterprise Maintenance window. Your selection on the AWS Patient List Restriction setting results in the list that displays. (See pages 39 and 40.)

Viewing Issued Pharmacy Check Codes

Follow these steps to view a list of the issued pharmacy check codes.

1. Choose the Pharmacy Check menu at the top of the AWS main window. The Pharmacy Check Browser opens.



The data displayed on this browser represents assigned pharmacy check approval codes. If you are using the multi-facility feature, the list may contain patients from multiple facilities/ locations, depending on how you set up your system. Refer to Working with Multi-Facilities on page 45.

2. Filter the view, if desired, by selecting either Unused Codes or All Issued Codes. Only the corresponding codes appear on the list.

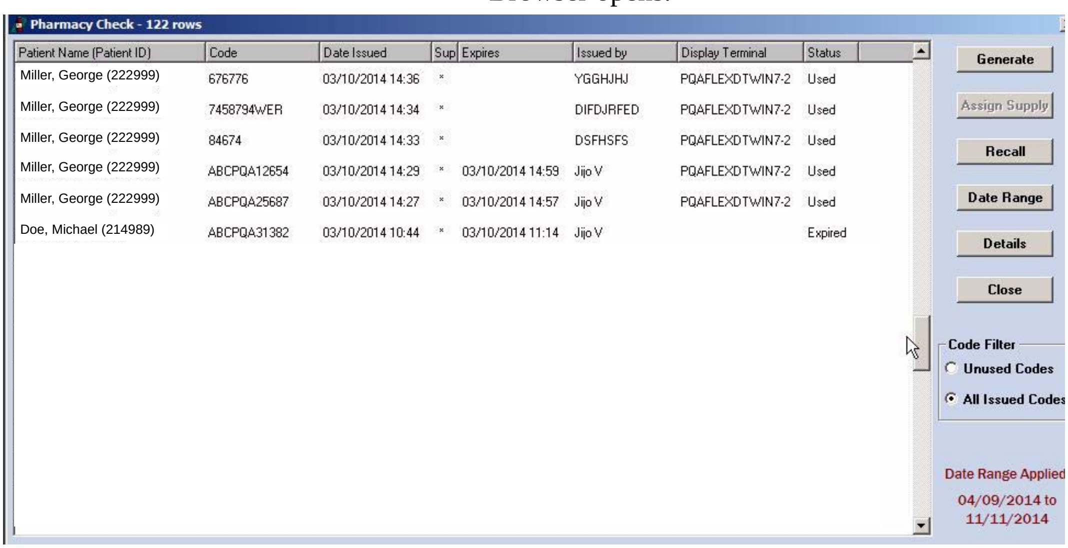
3. Select one of the items on the list, then click ***Details*** to see a window like that shown in the following figure.

The information displayed on this window contains usage details of the selected pharmacy code.

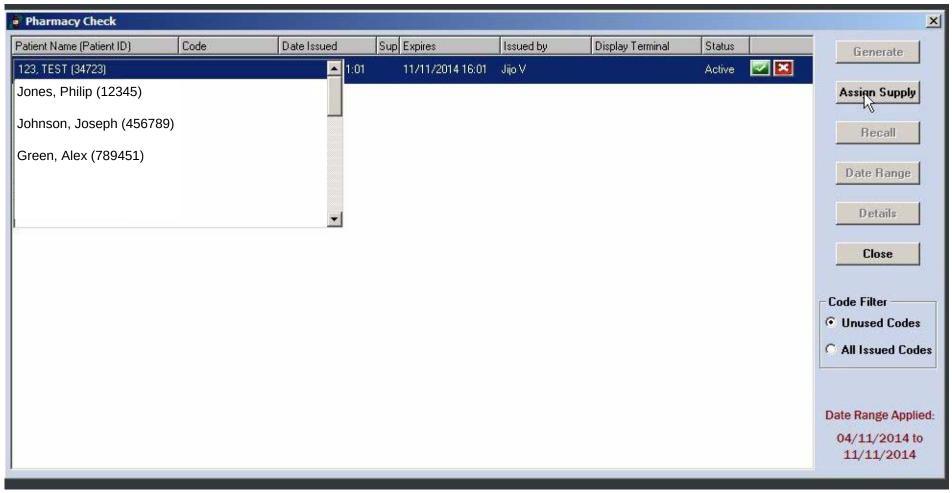
Generating a Pharmacy Check Approval Code

Follow these steps to generate an approval code.

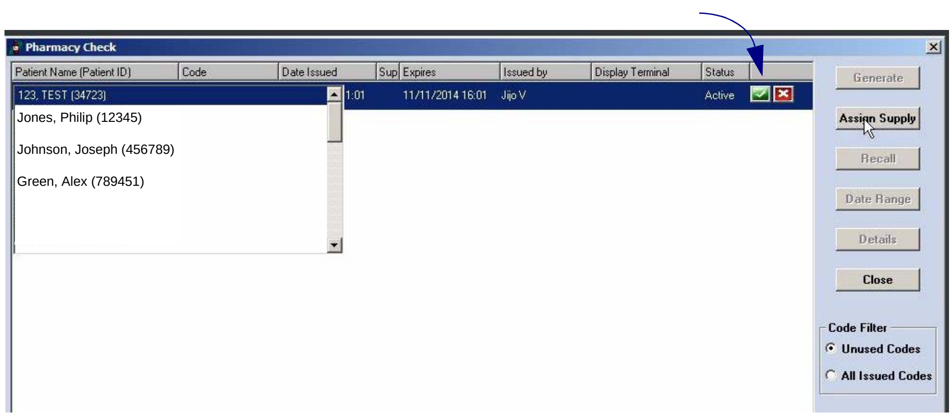
1. Choose the Pharmacy Check menu at the top of the AWS main window. The Pharmacy Check Browser opens.



2. Click ***Generate***. A list of patients appears.
3. Select a patient, then click ***Assign Supply***.



4. When the Supply Browser appears, select the supply with which you want to use the pharmacy check feature.
5. Click ***Select***.
6. Click the green button at the top of the Pharmacy Check window.



7. If you generate a code in error, select the erroneous code, then click ***Recall***. When the confirmation window appears, confirm the recall of the code.
8. To specify a date range for a code, select the code, then click ***Date Range***, then type a value. The default value is one week.
9. When you have finished, click ***Close*** to close the window.

Client Computers

ARxIUM implementation personnel will work with your staff to configure your clients when installing your system.

*Note: You must add departments to the database before adding any clients (*refer to Creating a DT Department on page 50*).*

You can configure your display terminal clients and any other clients with any of the MedSelect applications. That is, you can configure a client as a DT that you use to dispense items and also configure clients that do not dispense such as an administrative workstation, Centrack workstation, SmartStock workstation, ConfigureRx workstation, etc.

The applications that drive the workstations run on your system server; altogether the server and clients are your system network.

Client configuration is the first part of the overall configuration process.

Configuration consists of these three steps:

1. Configuring a client, which is covered in this chapter.
2. Configuring cabinets (modules) for dispensing supplies via drawers or shelves. Refer to *Configuring Cabinets/Virtual Storage Areas on page 172*.
3. Configuring controllers that control the cabinet drawers, drawer compartments and shelves. Refer to Creating/Configuring Controllers on page 210.

Working with Client Configuration

Note: The AWS, DT, and DT Location Assignment applications must be included in Client Configuration. Exam Rx (MedSelect), Exam CT (Centrack), and Exam SSP (SupplySelect) register themselves when MedSelect, Centrack, and SupplySelect, respectively, are part of your system.

Refer to Assigning App Type Properties on page 188 for the application types that require configuration.

You can also choose from the various applications that are available on the Client Configuration window in the App Type drop-down box. The list that follows is comprised of applications for which you do not set properties:

- ADT Interface - The MedSelect interface to a hospital admission, discharge, and transfer system
- ConfigureRx - The configuration and supply assignment utility accessed from the MedSelect DT
- Charting Interface - The MedSelect interface to a hospital charting system
- EXP Interface - The MedSelect interface to the ARxIUM pill packager
- Error Log - The MedSelect interface to report ADT or MedOrder errors
- Exam CT - Examiner reports for Centrack
- Exam Rx - Examiner reports for the MedSelect system
- Exam SSP - Examiner reports for the Supply Select system
- Formulary Interface - The MedSelect interface to a hospital pharmacy system to manage drug information
- Impromptu - MedSelect's underlying report software
- MedOrder Interface - The MedSelect interface to a hospital information system to receive patient orders
- NWS - The MedSelect Nursing WorkStation application
- Replenish Interface - The MedSelect interface to hospital drug refill systems
- Rx Billing Interface - The MedSelect interface to hospital billing systems

You must have the configuration access right to work with clients. See Adding a User on page 73 for setting rights.

Note: Do not assign a Centrack application to the same department as a DT.

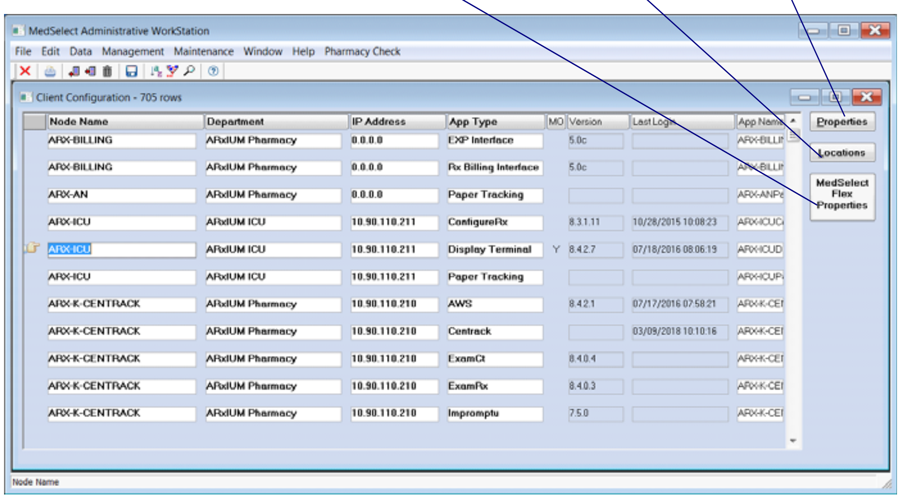
To begin working with client configuration, follow these steps:

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window.

This button is only accessible when you are working with an app type for which you can set properties.

Click ***MedSelect Properties*** to change DT global properties

Click ***Locations*** to assign locations to DTs.



Select any column heading to sort the information on this window by that column.

Adding a Client

Follow the steps below to add a new client.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window.
3. Click Add or Insert in the toolbar of the Client Configuration window to open a new row. (When you click Add, the fields open at the bottom of the column; when you click Insert, the fields open above the field you selected.)
4. Enter data under each of the headings.
5. Select the department and app type in the corresponding Department and App Type column drop-down boxes.

   Refer to the table on page 188 for an explanation of all the client configuration fields.

6. Click the Save icon.

   When the client you create is a DT, you must define a default location for the DT. After creating and saving your DT client, a prompt appears asking you to define a default location for the DT. Begin by clicking the ***Location*** button. Refer to Assigning Locations to a Display Terminal on page 185.

7. Click ***OK*** on the prompt.

Editing a Client

Follow the steps below to edit a client.

Note: You cannot change an existing application type. If you attempt to do so, a prompt appears stating that fact. Click ***OK*** *to clear the prompt.*

Note: You cannot change the version.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window.
3. Select any field under a column that you wish to edit, aside from the App Type or Version.
4. Edit the selection as necessary by entering new data in the field or by choosing from the Department drop-down box.

   Refer to the table on page 188 for an explanation of all the client configuration fields.
5. Click the Save icon.

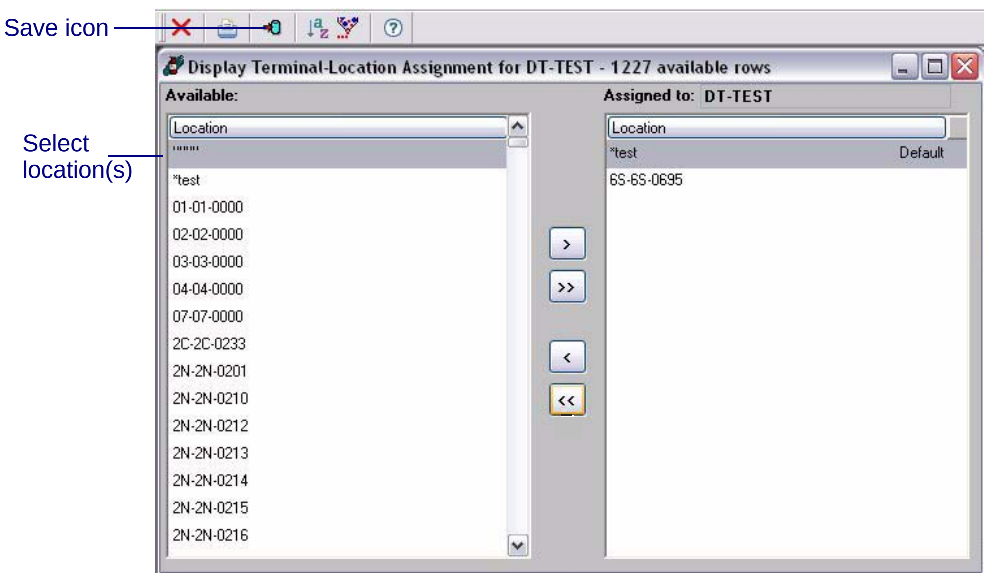
   If you are editing a DT, you may also want to assign or unassign locations to or from the DT. To do this, refer to Assigning Locations to a Display Terminal on page 185.

Assigning Locations to a Display Terminal

You must have the configuration access right to work with clients. See Adding a User on page 73 for setting rights.

When you assign a location to a DT, the DT only displays records for patients who are assigned to that same location. However, a user at a DT can find a patient in any location by using the DT's Find/Add feature.

To define a default location and assign other locations for a DT, begin by selecting the DT you just added on the Client Configuration window and then by clicking ***Location*** to open the Display Terminal Location Assignment window for that DT.



Follow the steps below to define a default location for the DT you just added.

Click either column to sort by that column.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window.
3. Select a location in the left column and click the > arrow to assign the location to the selected DT.
4. Select Data, then Set As Default Location on the main window toolbar.
5. Click Save in the toolbar. The location name is followed by "Default" and is the location where the DT resides.

   Now you can assign other locations to the DT you just added. Perform the following steps.

6. Select a location in the left column and click the > arrow to assign the location to the selected DT or click the >> arrows to assign all locations to the DT.

   You can also drag and drop location names from one side of the window to the other.

7. Click the Save icon.

Unassigning Locations from Display Terminals

You must have the configuration access right to work with clients. See Adding a User on page 73 for setting rights.

If the location name is followed by "Default", that is where the DT resides.

Note: You cannot unassign a location from a DT if it is the default location. Every DT has one default location.

Follow the steps below to unassign a location from a DT.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window. Select a DT on the Client Configuration window.
3. Click ***Location*** to open the Display Terminal Location Assignment window for that DT.
4. Select a location in the right column and click the < arrow to unassign the location from a DT or click the << arrows to unassign all locations from the DT.

   You can also drag and drop locations from one side of the window to the other.
5. Click the Save icon.

Client Configuration Field Definitions

Refer to the following table for an explanation of each of the client configuration fields.

Field	Explanation
Node Name	A unique name (16 characters maximum) that identifies the client computer running the application. It may be any valid TCP/IP node name.
Department	A department where a client is located.
IP Address	The client computer's assigned IP address (required for DTs), which must be provided by the facility’s information systems personnel.
App Type	The app type (or application type) is any MedSelect Flex application, such as AWS, Centrack, DT, MedOrder Interface, etc. that runs on a client.
App Name	The app name identifies the application. App names follow a standard format of combining the Node Name and the App Type. The system does this automatically.
MO	Indicates whether the DT is set up to dispense MedOrders.
Version	The current version of software.
Last Login	Indicates the last date/time a user logged in to the application.

Assigning App Type Properties

When you create one of the following application types for your client, you must configure additional properties.

- AWS app type properties (page 189)
- DT app type properties (page 191)

- DT global properties (page 194)
- Centrack app type properties (page 195)
- Paper Tracking app type properties (page 198)

Setting AWS App Type Properties

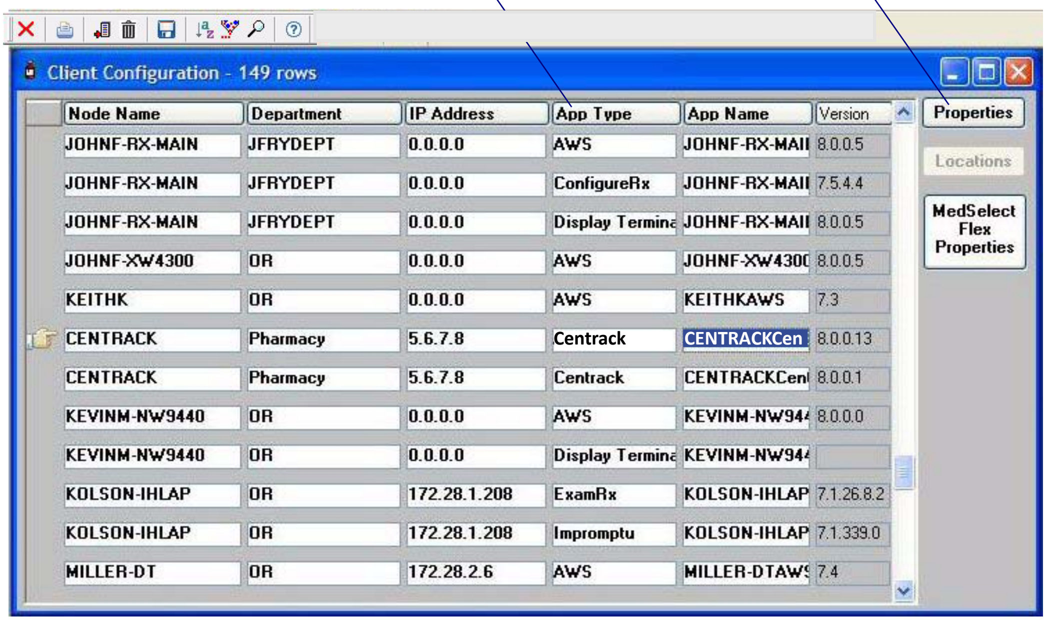
Use the AWS application to set up and manage your MedSelect system.

Follow the steps below to set the AWS application type properties.

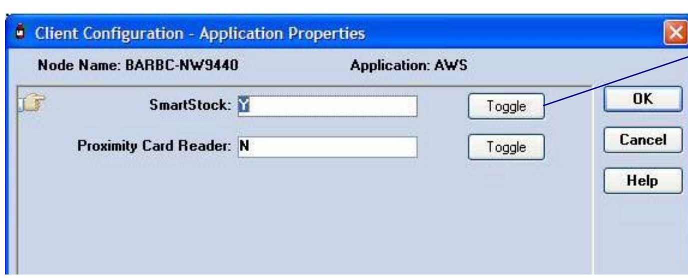
1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window. Select a DT on the Client Configuration window.
3. Click on an AWS field under the App Type column heading on the Client Configuration window.

Select the app type field for which you want to configure properties

Click ***Properties*** after selecting the App Type to open the corresponding window and configure properties



4. Click ***Properties*** to open the AWS App Type window.



Toggle

5. Click ***Toggle*** next to SmartStock if you want to change the setting from Y to N, or vice versa.
6. Click ***Toggle*** next to Proximity Card reader to change the setting from Y to N, or vice versa.
7. Click ***OK*** to save changes, or ***Cancel*** to cancel changes.

AWS App Type Field Definitions

Refer to the following table for an explanation of each of the AWS App Type fields.

Field	Explanation
SmartStock	Y = SmartStock is enabled, N = SmartStock is not enabled (default). SmartStock is an optional inventory/restocking package that you can use with your MedSelect Flex System.
Proximity Card Reader	Y = AWS expects proximity card reader input at the login window. However, if you choose to type your login, the cursor automatically moves down to the PIN field following a pause when you finish typing your user name, N = AWS won't expect proximity card reader input at the login window although you can still use your proximity card to log on.

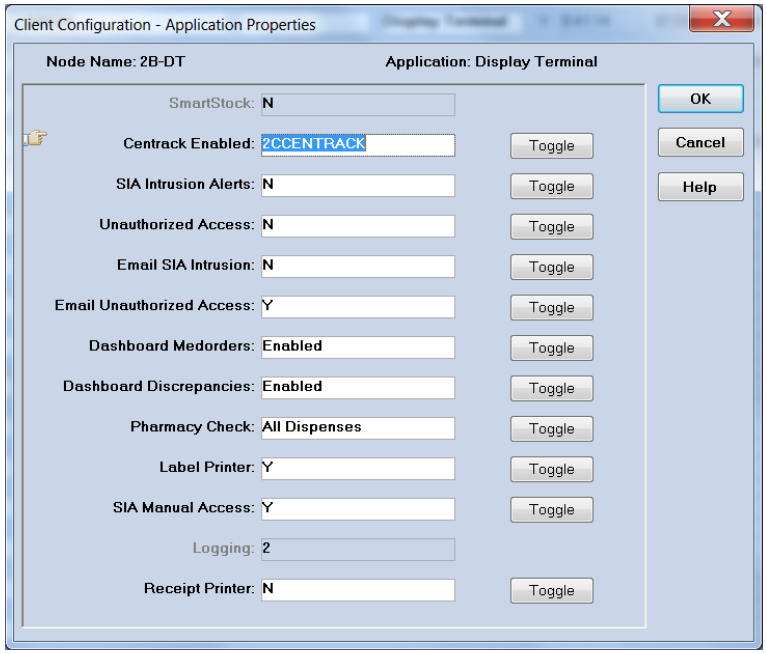
Setting Display Terminal App Type Properties

Display Terminal is the application that dispenses supplies for patients at the DTs within a department.

Refer to the following steps to set the DT application type properties.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window.
3. Select a DT on the Client Configuration window.

4. Select a Display Terminal field under the App Type column heading on the Client Configuration window.
5. Click ***Properties*** to open the Display Terminal App Type window.



6. Click ***Toggle*** next to each option, if desired, to change the setting from Y to N, or vice versa, referring to the table that follows for explanations of the options.

Note: Grayed-out properties cannot be changed.

7. Click ***OK*** to save changes, or ***Cancel*** to cancel changes.

DT App Type Field Definitions

Refer to the following table for an explanation of each of the DT App Type Fields.

Field	Explanation
SmartStock	This field is not enabled (default), and not editable.
Centrack Enabled	Y = Centrack is enabled and the value is set to the Node Name of an existing Centrack application. If more than one Centrack client is configured, the DT must be assigned to the Centrack application for its facility, N = Centrack will not track medications to and from the DT (default).
SIA Intrusion Alerts	Select Y if you want the system to alert you when someone tries to interfere with a single item access drawer. Choose N to disable this setting. Can be set on an individual DT basis.
Unauthorized Access	Y = this setting is enabled, unauthorized access alert appears when there is access to a drawer when the DT didn't send a drawer open command, N = this setting is disabled. Can be set on an individual DT basis.
Email SIA Intrusion	Y = is enabled and sends an email to department mail recipients when an intrusion occurs, N = disabled.
Email Unauthorized Access	Y = is enabled and sends an email to department mail recipients when an unauthorized access occurs, N = disabled.
Dashboard MedOrders	Y = this setting is enabled, and MedOrders are displayed on the DT dashboard. The default setting is N, which disables this functionality.
Dashboard Discrepancies	Y = this setting is enabled, and discrepancies are displayed on the DT dashboard. The default setting is N, which disables this functionality.

Field	Explanation
Pharmacy Check	Choose the type of dispenses to which you want to apply the pharmacy check feature. Choose from among: • All dispenses • None • Picklist dispenses • MedOrder dispenses
Label Printer	Y = enabled, you may print patient-specific labels; N = disabled.
SIA Manual Access	Y = enabled, users may manually access the SIA drawers if there is a jam or other error; N = disabled.
Logging	The log file detail level, not editable.
Receipt Printer	The receipt printer is enabled, N = The receipt printer is not enabled (default).

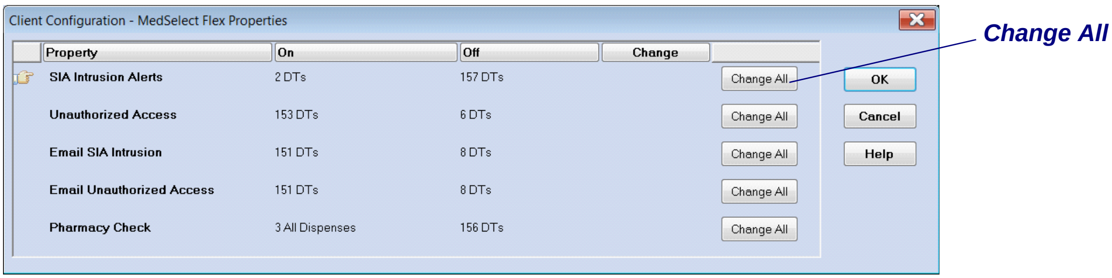
Setting Display Terminal Global Properties

You can enable (on) or disable (off) the global properties for intrusion alerts and unauthorized access for all DTs. Refer to the DT App Type field definitions above for descriptions of these properties.

Follow the steps below to change the DT global properties.

1. Select Configuration on the Maintenance list.
2. Select Client to open the Client Configuration window. Select a DT on the Client Configuration window.
3. Select a Display Terminal field under the App Type column heading on the Client Configuration window.

4. Click ***MedSelect Flex Properties*** to open the Client Configuration MedSelect Flex Properties window.



5. Click ***Change All*** for any properties you want to make global; a prompt appears.
6. Enter Y (yes) in the field.
7. Click ***OK***. The letter Y appears under the Change column in the MedSelect Flex Properties window.
8. Click ***OK*** to save changes, or ***Cancel*** to cancel changes.

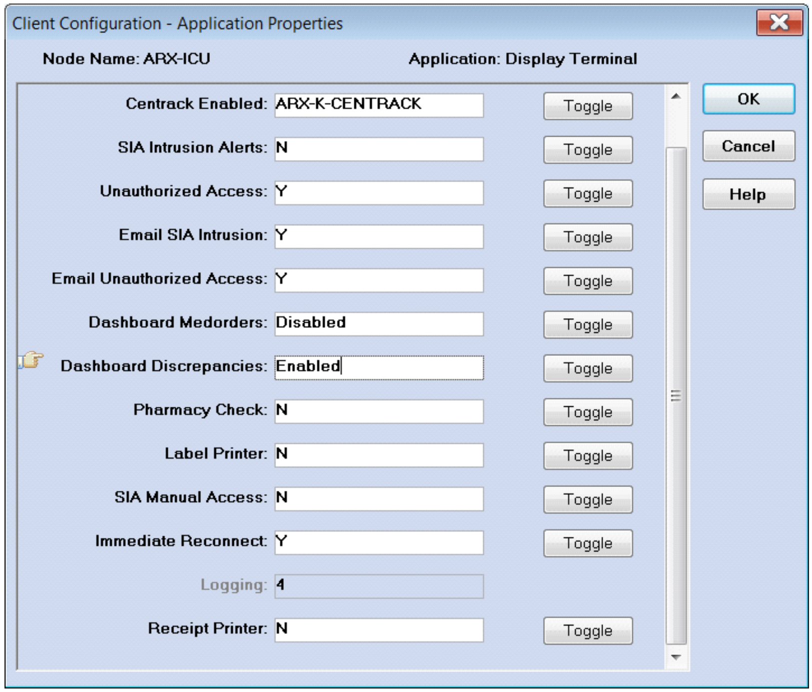
Setting Centrack App Type Properties

Centrack is a separate software system installed in the pharmacy to track controlled substances and other items from receipt through distribution to resolution.

Follow the steps below to set the Centrack application type properties.

1. Select a Centrack field under the App Type column heading on the Client Configuration window.

2. Click ***Properties*** to open the Centrack App Type window.



3. Click ***Toggle*** next to any line item if you want to change the setting from Y to N, or vice versa.

Note: You cannot toggle the Discrepancy Time Interval It remains set unless you change it. You also cannot toggle the IB Communication Flag. It must be set at 1.

4. Click ***OK*** to save changes, or ***Cancel*** to cancel changes.

Centrack App Type Field Definitions

Refer to the following table for an explanation of each of the Centrack App Type Fields.

Field	Explanation
Audit Witness Required	Y = Centrack requires a witness to log in, N = no witness is required.
Discrepancy Time Interval	The amount of time, in hours, after which a medication in transit is considered a discrepancy. View records on the Centrack Medication Tracking window.
Administration Only	Use this option to set up an administration-only version of Centrack that will allow limited functionality.
Audit After Access	When turned on, the Count Remaining window is ignored for all functions except withdraws. If you choose Never, the Count Remaining window appears for every access to a count remaining item, and the Audit Count Remaining function is never used. If you choose Non-Withdraws, the Count Remaining window is ignored for all accesses to a count remaining item except for when withdrawing, then counted via the Audit Count Remaining function. When you choose Withdraws, the Count Remaining window is ignored for withdraws of a count remaining item. When you choose All Accesses, the Count Remaining window is ignored for all access, then counted via the Audit Count Remaining function.
SIA Intrusion Alert	Select Y if you want the system to alert you when someone tries to interfere with a single item access drawer.
Unauthorized Access	Select Y if you want the system to alert you when an unauthorized access occurs.

Field	Explanation
E-mail SIA Intrusion	Select Y if you want the system to automatically send you an e-mail message when someone tries to interfere with a single item access drawer.
E-mail Unauthorized Access	Select Y if you want the system to automatically send you an e-mail when there has been an unauthorized access.
Proximity Card Reader	Select Y when your setup includes a proximity card reader, and you want the system to display the password field immediately after you scan the proximity card.
Position Message	Select Y if you want the system to display a position message at the time of access for SCM and towers.
SIA Manual Access	Y = enabled, users may manually access the SIA drawers if there is a jam or other error; N = disabled.

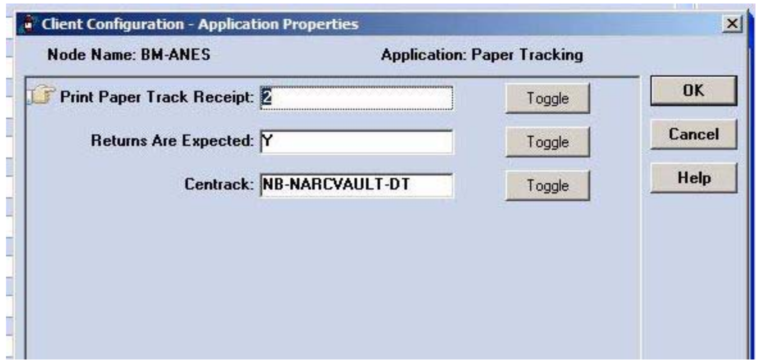
Setting Paper Tracking App Type Properties

Paper tracking is the means by which the pharmacy vault uses a paper receipt to track Centrack-supplied medications to and from locations without the use of a DT. Medications withdrawn from the vault are taken to patients by a nurse who manually records the action on the receipt. The nurse then returns the receipt (and possibly meds) to the vault after some or all the medications have been given or wasted.

The pharmacy retains a copy of the receipt in the vault while the nurse’s copy is being used.

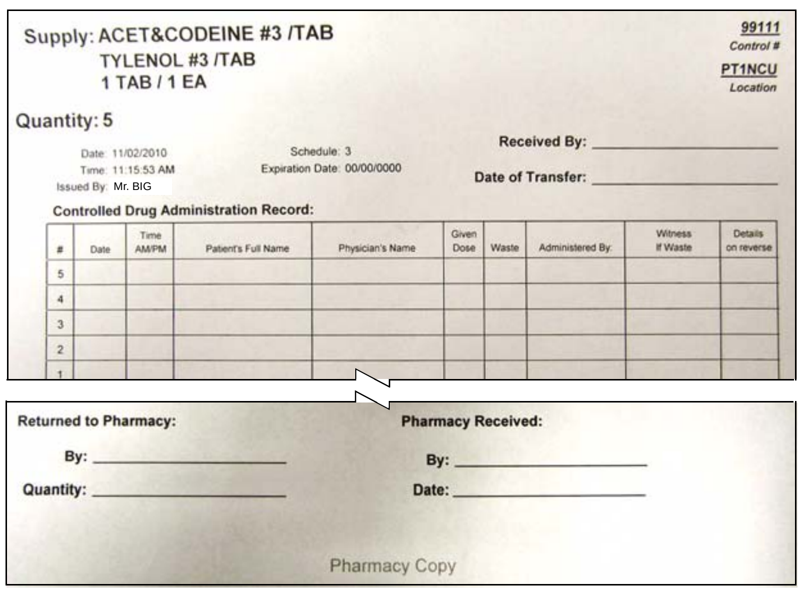
Follow the steps below to set the paper tracking application type property.

1. Select a paper tracking field under the AppType column on the Client Configuration window.
2. Click ***Properties*** to open the Paper Tracking App Type window.



3. Click ***Toggle*** next to Print Paper Tracking Receipt if you want to change the setting. You can choose any of the following:
   - 0 - to print no control sheet upon dispense
   - 1 - to print 1 copy
   - 2 - to print 2 copies

   A sample is shown in the following image.



Supply: ACET&CODEINE #3 /TAB
TYLENOL #3 /TAB
1 TAB / 1 EA

99111
Control #
PT1NCU
Location

Quantity: 5

Date: 11/02/2010
Time: 11:15:53 AM
Issued By: Mr. BIG
Schedule: 3
Expiration Date: 00/00/0000

Received By: ______
Date of Transfer: ______

Controlled Drug Administration Record:

#	Date	Time AM/PM	Patient's Full Name	Physician's Name	Given Dose	Waste	Administered By	Witness if Waste	Details on reverse
5									
4									
3									
2									
1									

Returned to Pharmacy:
By: ______
Quantity: ______

Pharmacy Received:
By: ______
Date: ______

Pharmacy Copy

4. Click ***Toggle*** next to Returns are Expected to change from Y to N (or vice versa), depending on whether or not you expect returns.
5. Click ***Toggle*** next to Centrack to choose the Centrack to which you want to assign the paper tracking location.
6. Click ***OK*** to save the change, or ***Cancel*** to cancel the change.

Paper Tracking Receipt Field Definitions

Refer to the following table for an explanation of each of the fields on the Paper Tracking Receipt window shown on the previous page.

Field	Explanation
Supply	The trade and generic name of the medication and the type and quantity to be administered
Control #	The number of the receipt form
Location	The site location at which the medications are being dispensed
Quantity	The total quantity of a medication that was dispensed
Date/Time	The date and time a medication was dispensed
Issued By	The name of the person that dispensed the medication
Schedule	The DEA schedule of the medication
Expiration Date	The manufacturer’s medication expiration date

Field	Explanation
Received By	The name of the person taking possession of the medication(s) and receipts
Date of Transfer	The date a person took possession of the medication(s) and receipts
#	A number that identifies the row
Date	The date a medication was administered
Time AM/PM	The time a medication was administered
Patient's Full Name	The full name of the patient to which a medication was administered
Physician's Name	The name of the physician who prescribed the medication
Given Dose	Put a check mark to indicate a medication was administered
Waste	Put a check mark to indicate a medication was wasted
Administered By	The name of the nurse that administered the medication
Witness If Waste	The name of the person who witnessed the wasting of a medication
Details on reverse	Check to indicate that there is more information on the reverse side of the receipt
Returned to Pharmacy: By	The name of the person returning medications to the pharmacy
Returned to Pharmacy: Quantity	The quantity of the medications being returned to the pharmacy
Pharmacy Received: By	The name of the person receiving medications at the pharmacy
Pharmacy Received: Date	The date the returned medications were received by the pharmacy

Setting NWS App Type Properties

CAUTION

Do not modify your NWS properties unless instructed to do so by ARxIUM support.

If you are using the NWS application, your system was set up for its use during implementation, and rarely requires modification.

Do not modify your NWS properties unless instructed to do so by ARxIUM support. To review your NWS configuration, follow these steps.

1. On the Client Configuration window, select an NWS line.
2. Click ***Properties*** to open the NWS App Type window.
3. If you see a Y, your system has been pre-configured. In this case, the client will only support the assigned department, that is, the department seen in the client configuration. This is the default setting.
4. If you see an N, your system has not been pre-configured. The DT is a shared NWS client used for distributed virtual desktops.

Deleting a Client

Note: You cannot delete a display terminal if it is assigned to a location, has assigned supplies, or has an assigned controller.

Follow the steps below to delete a client.

1. Select a DT on the Client Configuration window.
2. Click Delete in the toolbar; a confirmation window appears.
3. Click ***Yes*** to confirm the deletion, then click the Save icon.

Note: The data is not removed from the database until you save. When you delete a client, it is no longer registered and you may encounter problems when the MedSelect application re-starts.

Notes:

Cabinets, Virtual Storage Areas, and Controllers

ARxIUM implementation personnel works with your staff to configure your cabinets and virtual storage locations, and to configure controllers.

Note: You must create locations before you can create cabinets or virtual storage areas.

Note: You must configure clients (refer to Client Computers on page 179) before configuring cabinets, virtual storage areas, and controllers.

You must have the configuration right to maintain cabinets and virtual storage areas. Refer to Adding a User on page 73.

Configuring cabinets and virtual storage areas and controllers are the second and third parts of the configuration process begun in Chapter . Configuration consists of these three steps:

1. Configuring a client (DT). Refer to Client Computers on page 179.
2. Configuring cabinets. Refer to Configuring Cabinets/Virtual Storage Areas on page 206.

3. Configuring controllers that control cabinet drawers, compartments and shelves. Refer to Creating/Configuring Controllers on page 210.

Important: To reassign a cabinet to a different display terminal you must first unassign all meds (refer to Unassigning Supplies from Positions on page 314) and then change the DT designation for each controller in the controller configuration window before re-assigning the meds. When reassigning cabinets, always contact the ARxIUM implementation help desk for assistance.

Important: If you replace a display terminal, you must give the new DT the same node name as the old one. In this way, no change is needed at the AWS and the new DT will function properly. A DT should only be replaced by authorized ARxIUM service personnel.

Configuring Cabinets/Virtual Storage Areas

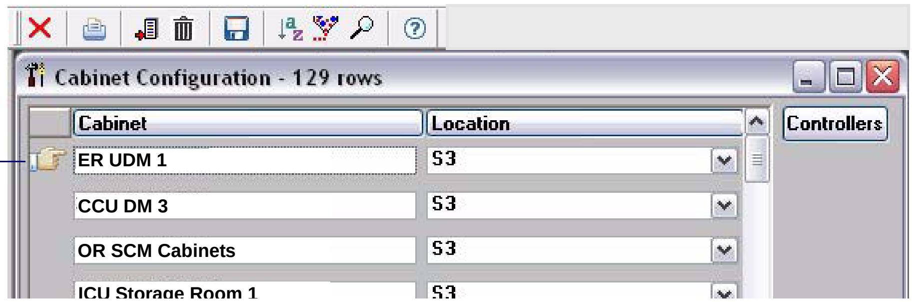
You can add, edit, or delete the names of MedSelect dispensing modules, which include DMs/CDMs, UDMs, SCMs, ELMs, and TMs.

This includes virtual storage areas, which you use to create locations to store and track supplies without the use of MedSelect dispensing modules.

To configure cabinets/virtual storage areas, begin by performing the following steps.

1. Select Configuration on the Maintenance menu.
2. Select Cabinet to open the Cabinet Configuration window.

Select a cabinet



Click either column to sort by that column.

Adding a Cabinet/Virtual Storage Area

Follow the steps below to add a cabinet.

1. Select Configuration on the Maintenance menu.
2. Select Cabinet to open the Cabinet Configuration window.
3. Click the Add icon on the toolbar of the Cabinet Configuration window to open new fields.
4. Enter the cabinet/virtual storage description in the Cabinet column. The description may vary depending on the type of cabinet or storage area you are adding. The descriptions are as follows:
    - If you are entering a description for a CDM/DM or UDM, use the area and equipment acronym such as ER UDM 1, CCU DM3.

- If you are entering a description for an SCM or ELM, use an area and equipment group acronym such as OR SCM Cabinets.
- If you are entering a description for a virtual storage area, use the actual name of the virtual storage area such as ICU Storage Room 1. You may assign more than one storage area to a DT.

Refer to the following table for an explanation of the fields.

5. Click the Save icon.

Editing a Cabinet/Virtual Storage Area

Follow the steps below to edit a cabinet.

1. Select Configuration on the Maintenance list.
2. Select Cabinet to open the Cabinet Configuration window.
3. Select a cabinet on the Cabinet Configuration window.
4. Edit the fields as necessary, referring to the following table for an explanation of the cabinet fields.
5. Select a location from the drop-down box.
6. Click the Save icon.

Cabinet Field Definitions

Refer to the following table for an explanation of each of the cabinet fields.

Field	Explanation
Cabinet	A name that describes a cabinet, such as ER UDM or ICU Storage Room. Each cabinet must have a unique description
Location	The physical location of the cabinet

Deleting a Cabinet/Virtual Storage Area

Follow the steps below to delete a cabinet.

Note: When you delete a cabinet or storage area, all associated controllers and positions are also deleted. However, before you can delete a cabinet or storage area, you must first unassign all supplies assigned to its positions. Refer to Unassigning Supplies from Positions on page 314.

1. Select a cabinet on the Cabinet Configuration window.
2. Click Delete in the toolbar; a confirmation window appears.
3. Click ***Yes*** to confirm the deletion.
4. Click the Save icon.

Creating/Configuring Controllers

Once you have added the cabinet and virtual storage area names and locations, you must configure the controllers contained within the cabinets. Controllers control the operation of the DM/CDM drawers and UDM shelves.

Each module comes with an installation worksheet, which provides the information you need to configure that specific module as it was ordered by your facility.

Refer to the following sample DM/CDM installation worksheet for the positions, part numbers, descriptions and addresses required.

DM/CDM Installation Worksheet

Site: Address: Location: Serial #: Sales Order #: Customer Order #	--- 220A-PK01-PROTO-B08 10-M2BMOD-08 BMod08	Build Date: 22-Feb-10

00-900220-000A Drawer Module (DM)

SAMPLE

Key / Lock Number MS698

Mount 10-501221-000A BASE ASSY

Position	Part Number	Description	Address
1	10-501173-000A	A Drawer Assembly - 10 small drawers	1A004309
2	10-501162-000A	D Drawer Assembly - 6 small drawers, 1 R/R	1A004802
3	10-501260-000A	J Drawer Assembly - 10 small drawers - SIA	2A005500
4	10-501138-000A	B Drawer Assembly - 5 medium drawers	1A004304
5	10-501149-000A	C Drawer Assembly - 1 large drawer	1A004900

Notes:

medSELECT

Refer to the following sample UDM installation worksheet for the positions, part numbers, descriptions and addresses required.

UDM Installation Worksheet

Site: Address: Location: Serial #: Sales Order #: Customer Order #	--- 210A-PK01-PROTO-B08 10-M2BMOD-08 BMod08	Build Date: 19-Feb-10

00-900210-000A UNIT DOSE MDL (UDM)

SAMPLE

Key / Lock Number	MS3625		I/O Board Address 0982832A
Mount	19-040390-000A	MDL/CNTR MT KIT,UDM	

Position	Part Number	Description	Address
1	10-501031-000A	ORAL HELIX,1.0 OD,40 CAP	18005004
2	10-501031-000D	ORAL HELIX,1.4 OD,40 CAP	18004800
3	10-501042-000A	INJ HELIX,1, 2, 3 ML VIALS,1, 2 ML AMPS,20 CAP	18004706
4	10-501042-000C	INJ HELIX,5 ML AMPS 15 CAP	18004700
5	10-501041-000A	INJ BIN,5 SM BINS	17004907

Notes: UNIT B08 SHORT 16 10-501036 DIVIDERS FOR UDM
UNIT SHORT 10-501251-000A 10-501251-000B UPGRD KIT

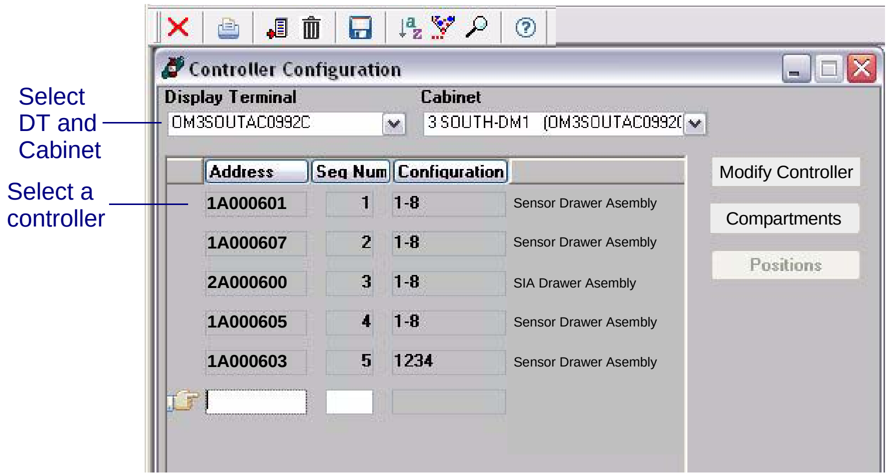
medSELECT

Note: A UDM requires two types of controllers: shelf controllers (which can be either solid or injectable bin controllers), and a lock controller.

You must have the configuration right to create and maintain controllers. Refer to Adding a User on page 73.

There are two methods to create/configure controllers for DMs, CDMs, UDMs, and virtual storage areas.

The first method is to begin by selecting Configuration in the Maintenance list and then selecting Controller to open the Controller Configuration window.



Follow the steps below to create/configure DMs, CDMs, UDMs, and virtual storage areas.

1. Select the DT that will support the new cabinet from the display terminal drop-down box.
2. Select the cabinet that you want to configure in the cabinet drop-down box.
3. Click the Add icon on the toolbar of the Controller Configuration window to open new fields.

   Proceed to step 4 below to continue the configuration process.

The second method to create/configure controllers is to begin by selecting Configuration in the

Maintenance list and then selecting Cabinets to open the Cabinet Configuration window.

Follow the steps below to create/configure DMs, CDMs, UDMs, and virtual storage areas.

1. Select the cabinet that you want to configure.
2. Click ***Controllers*** to open the Controller Configuration window
3. Click Add or Insert in the toolbar of the Controller Configuration window to open new fields. (When you click Add, a row opens at the bottom of the column; when you click Insert, a row opens above the row you select.)
4. Enter the data into the fields.

   Refer to the table on page 215 for an explanation of the controller configuration fields.
5. Click the Save icon.

Note: If you have not specified a DT for a new cabinet, the system will ask you to assign a DT.

Creating Multiple Controllers in a Virtual Storage Area

Determine whether your virtual storage area should be divided into shelves, just as a UDM contains separate shelves. If so, you must create a new virtual controller for each shelf. If not, the entire virtual area is regarded as having only one shelf, and therefore, only one virtual controller.

Note: You can select your controller configuration to be “virtual” for a standard virtual storage shelf, or “return” for a virtual return shelf. Specify your choice in the drop-down box under the Configuration column on the

Controller Configuration window.

Determine whether your shelf or shelves will be divided into separate positions. If so, you must divide each shelf's virtual controller into the desired number of positions, just as a drawer in a DM can be divided into compartments.

Note: When considering how to divide your virtual storage area, it is easiest to have one controller, and create a separate position for each supply. However, if you have many supplies, you may want to create more controllers, and have fewer positions for each controller. This may make it easier to locate your supplies. For example, a supply stored on shelf 1, position 31 might be easier to find if it is stored on shelf 3, position 1, where each shelf has only 10 positions.

Controller Configuration Field Definitions

Refer to the following table for an explanation of each of the controller configuration fields.

Field	Explanation
Display Terminal	The node name assigned to the DT that powers this controller.
Cabinet	Identifies the cabinet that contains a set of controllers.

Field	Explanation
Address	Address is the number assigned to the processor chip on the controller. Refer to the information below for address specifics. DM/CDM standard drawer address:1Axxxxxx DM/CDM single item access (SIA) drawer address:2Axxxxxx UDM injectable bin dispenser address: 17xxxxxx UDM solid and injectable helix address: 18xxxxxx UDM lock address: 09xxxxxx Virtual storage area address: FFxxxxxx* SCM/ELM address: 0Bxxxxxx Standard tower address: 0Cxxxxxx (the remaining shelf addresses are FFxxxxxx*) Tower catheter rail address: 0Exxxxxx (the remaining shelf addreses are FFxxxxxx*) Integrated Tower address: 0Cxxxxxx (the remaining shelf addresses are FFxxxxxx, 1Axxxxxx, 2Axxxxxx) *Note: The system creates the rest of the virtual storage area and FF tower addresses automatically.
Seq Num	Seq Num is the number that describes the physical order of controllers when there is more than one of the same type in a cabinet or virtual storage area. For example, a drawer module or virtual storage area has five controllers; the top controller has a sequence number of 1, the next lowest has a sequence number of 2, and the bottom controller has a sequence number of 5. The sequence numbers must be sequential and must not be duplicated for like controller types. The sequence number for the first shelf controller in the UDM must be 1. For a UDM lock controller, the sequence number must also be 1.
Configuration	Configuration is a list of possible configurations for the controller. For some controllers (tower shelves and SCM/ELM) a Configure button appears only after you enter data in the Address and Sequence Num fields.

Working with Positions and Compartments

When you have created all of your cabinets/storage areas, you may want to divide these into smaller compartments or storage positions, depending on your inventory needs and the type of device or area.

Begin by selecting Configuration in the Maintenance list and then selecting Controller to open the Controller Configuration window.

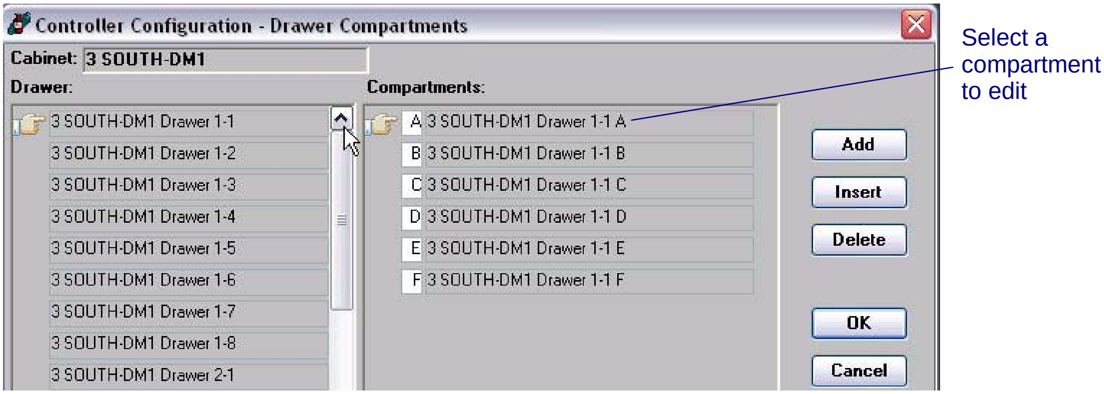
Configuring Compartments for a Standard DM/CDM Drawer

You can divide standard drawers into compartments (16 maximum) to separate supplies. If needed, you can edit or delete compartments.

Adding Compartments

Follow the steps below to add a compartment.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.
4. Select a cabinet from the Cabinet drop-down box.
5. Select a standard cabinet address (1Axxxxxx).
6. Click ***Compartments*** to open the Drawer Compartments window.



All the drawers display in the left pane.

7. Click ***Add*** to add each successive compartment or click ***Insert*** to insert a compartment before a selected compartment.

   By default, the compartments are labeled sequentially starting with the letter A.

8. Click ***OK*** to save or ***Cancel*** to close without saving.

Editing Compartments

Follow the steps below to edit a compartment.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.
4. Select a cabinet from the Cabinet drop-down box.

5. Click ***Compartments*** to open the Drawer Compartments window.

   All the drawers display in the left pane.

6. Select a compartment in the right pane.
7. Edit the label to any letter you want. Numbers are not valid labels for a compartment.
8. Click ***OK*** to save or ***Cancel*** to close without saving.

Deleting Compartments

Follow the steps below to delete a compartment.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.
4. Select a cabinet from the Cabinet drop-down box.
5. Click ***Compartments*** to open the Drawer Compartments window.

   All the drawers display in the left pane.

6. Select the drawer you want from the list.
7. Select the compartment you want to delete from the list in the right pane.
8. Click ***Delete***.
9. Click ***OK*** to save or ***Cancel*** to close without saving.

Note: The MedSelect Flex system will not allow you to delete a compartment if the compartment is active (has supplies assigned to it) within the system. You must first unassign all supplies assigned to compartments. Refer to Unassigning Supplies from Positions on page 314. If such a condition exists, a message window notifies you that the supplies must be unassigned.

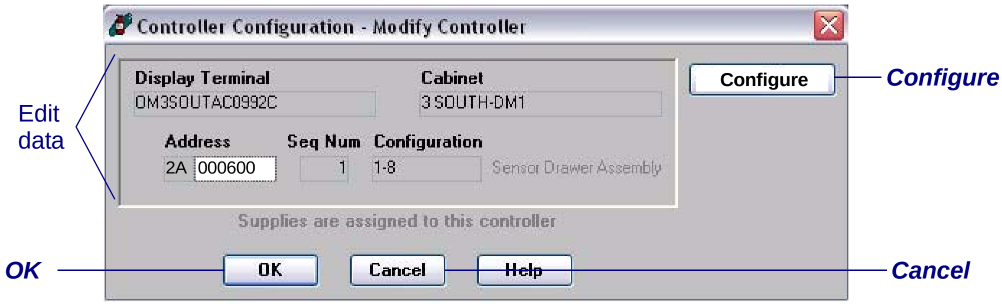
Configuring Compartments for a Single Item Access DM/CDM Drawer

You can divide SIA drawers into compartments to accommodate different sizes of supplies.

Follow the steps below to divide an SIA drawer.

Note: If the drawer has supplies assigned, you must unassign them before reconfiguration, refer to Unassigning Supplies from Positions on page 314.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.
4. Select a cabinet from the drop-down box.
5. Select an SIA cabinet address (2Axxxxxx).
6. Click ***Modify Controller*** to open the Controller Configuration - Modify Controller window.

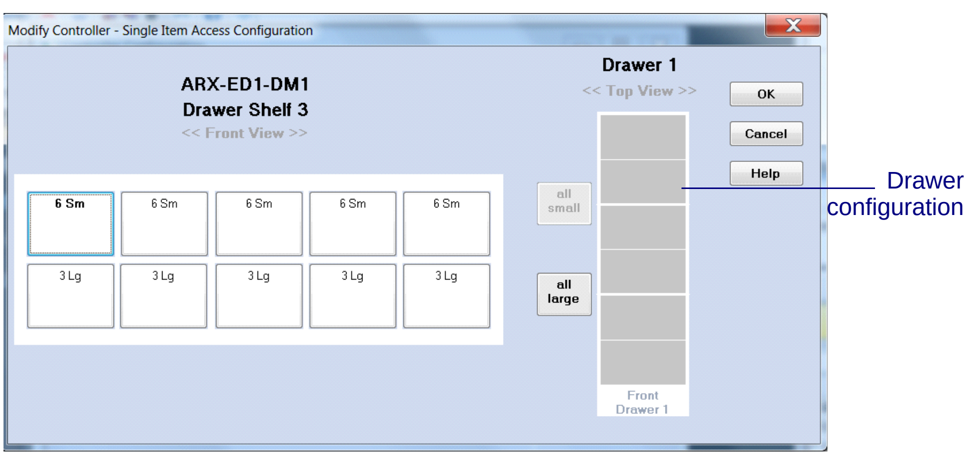


7. Click ***Configure*** to open the Modify Controller - Single Item Access Configuration window.

   There are 10 boxes on the left showing drawers as viewed from the front of the module. Each has one of two assigned configurations:

   - 6 small
   - 3 large

8. Select a drawer to display its configuration on the right side.



9. To change the configuration to a 3 large (for example), click ***all large***.

10. Click ***OK*** to save or ***Cancel*** to close without saving.

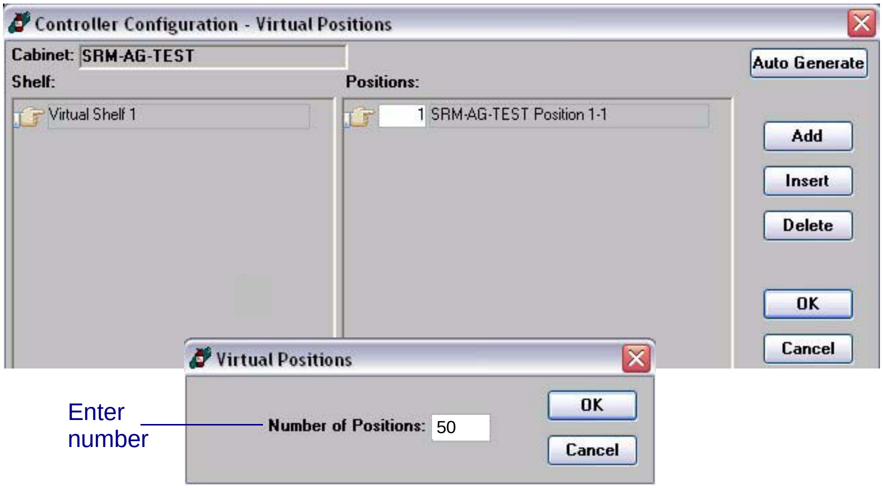
Configuring Positions for a Virtual Storage Area

By default, all virtual storage shelves contain one position. However, you can create as many positions as needed on a virtual storage shelf.

Adding Positions

Follow the steps below to add a position.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal that will support the new shelf from the Display Terminal drop-down box in the Controller Configurations window.
4. Select the virtual storage area that includes the shelf you want to divide from the Cabinet drop-down box.
5. Click ***Positions*** to open the Controller Configuration - Virtual Positions window.



All existing shelves and positions supported by that controller appear. Shelves are in the left pane and positions are in the right pane.

6. Click ***Add*** to add each successive individual position, or click ***Insert*** to insert an individual position before a selected position.
7. Click ***Auto Generate*** to automatically add multiple positions. A pop-up will appear.
8. When the pop-up appears, enter the number of positions you want to generate (for example, enter 50 to create 50 positions inside the area), and then click ***OK***.

Note:If the Auto Generate button is not available, then you have already created positions for this shelf. To auto generate positions again, you must first delete all existing positions except for position 1.

9. Click ***OK*** to save or ***Cancel*** to close without saving.

Deleting Positions

Follow the steps below to delete a position.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal that supports the new shelf from the Display Terminal drop-down box in the Controller Configurations window.
4. Select the virtual storage area that includes the position you want to delete from the Cabinet drop-down box.
5. Click ***Positions*** to open the Controller Configuration - Virtual Positions window.

   All existing shelves and positions supported by that controller appear. Shelves are in the left pane and positions are in the right pane.

6. Select the position you want to delete in the right pane.
7. Click ***Delete***; a confirmation window appears.
8. Click ***Yes*** to confirm the deletion.
9. Click ***OK*** to save or ***Cancel*** to close without saving.

Note: The MedSelect Flex system will not allow you to delete a shelf if the shelf is active (has positions assigned to it) within the system. You must first delete all positions assigned to the ELC. Refer to Deleting Positions above. If such a condition exists, a message window notifies you that the positions must be deleted.

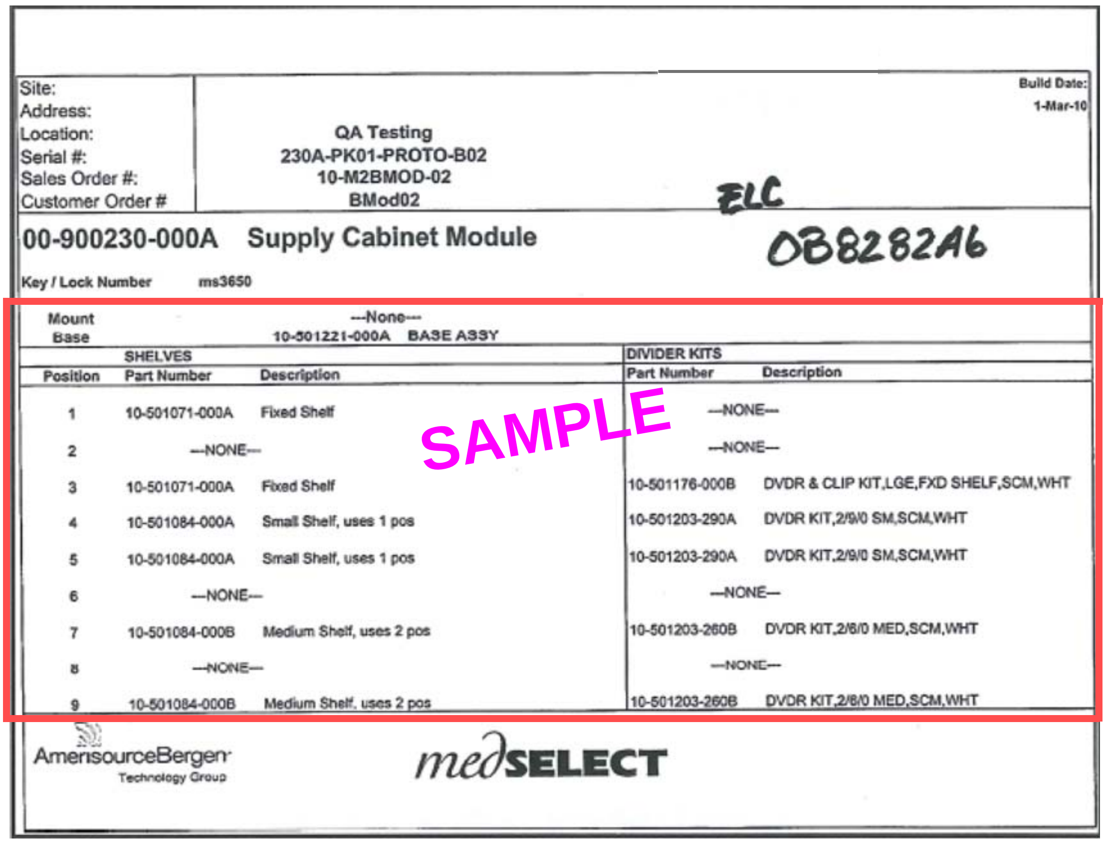
Creating/Configuring Controllers

Once you have added the cabinet names and locations, you must configure the electronic lock controllers, which control the operation of the SCM, ELM and other lockable cabinets or refrigerators.

Each module comes with its own installation worksheet, which provides the information needed to configure that specific module as it was ordered by the facility.

Refer to the sample SCM installation worksheet on page 226 for the positions, part numbers, descriptions and addresses required.

SCM Installation Worksheet



Site:
Address:
Location: QA Testing
Serial #: 230A-PK01-PROTO-B02
Sales Order #: 10-M2BMOD-02
Customer Order # BMod02

Build Date: 1-Mar-10

ELC

00-900230-000A Supply Cabinet Module

0B8282A6

Key / Lock Number ms3650

Mount ---None---
Base 10-501221-000A BASE ASSY

SHELVES			DIVIDER KITS	
Position	Part Number	Description	Part Number	Description
1	10-501071-000A	Fixed Shelf	—NONE—	
2	—NONE—		—NONE—	
3	10-501071-000A	Fixed Shelf	10-501176-000B	DVDR & CLIP KIT,LGE,FXD SHELF,SCM,WHT
4	10-501084-000A	Small Shelf, uses 1 pos	10-501203-290A	DVDR KIT,2/9/0 SM,SCM,WHT
5	10-501084-000A	Small Shelf, uses 1 pos	10-501203-290A	DVDR KIT,2/9/0 SM,SCM,WHT
6	—NONE—		—NONE—	
7	10-501084-000B	Medium Shelf, uses 2 pos	10-501203-260B	DVDR KIT,2/6/0 MED,SCM,WHT
8	—NONE—		—NONE—	
9	10-501084-000B	Medium Shelf, uses 2 pos	10-501203-260B	DVDR KIT,2/6/0 MED,SCM,WHT

SAMPLE

AmerisourceBergen
Technology Group

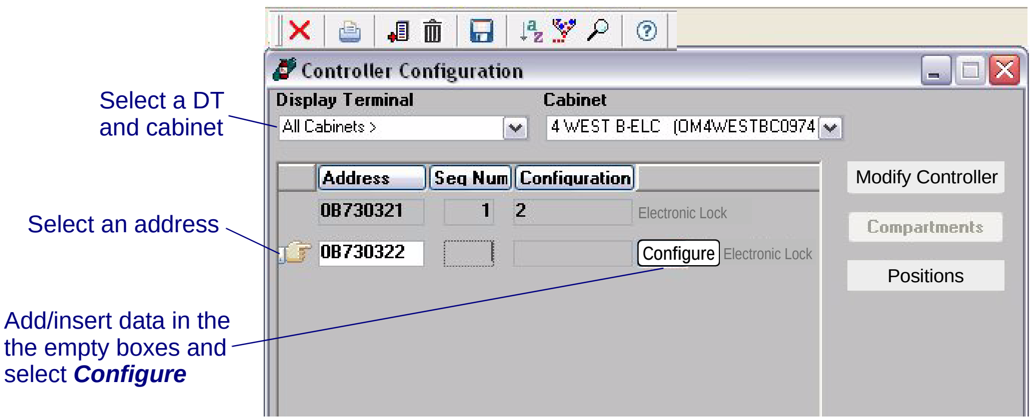
medSELECT

You must have the configuration right to create and maintain controllers. Refer to Adding a User on page 73.

Controller configuration for the SCM and ELM requires that you specify the ports on the controller card to which the devices are attached. The controller you add can support any combination of up to eight different SCMs and ELMs.

There are two methods to create/configure controllers for SCMs and ELMs.

The first method is to begin by selecting Configuration in the Maintenance list and then selecting Controller to open the Controller Configuration window.



Follow the steps below to create/configure SCMs and ELMs.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select the DT that will support the new cabinet from the display terminal drop-down box.
4. Select the cabinet that you want to configure in the cabinet drop-down box.

5. Click the Add icon on the toolbar of the Controller Configuration window to open new fields.

   Refer to step 6 below to continue the configuration process.

The second method to create/configure controllers is to begin by selecting Configuration in the Maintenance list and then selecting Cabinets to open the Cabinet Configuration window.

Follow the steps below to create/configure SCMs, and ELMs.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select the cabinet that you want to configure.
4. Click ***Controllers*** to open the Controller Configuration window.
5. Click the Add icon on the toolbar of the Controller Configuration window to open new fields.

6. Enter the data into the fields. Observe these criteria for SCM/ELM controllers:

   - The address must begin with 0B (a zero and the letter B) and be followed by six numbers.
   - The cabinet description should describe an entire set of SCMs or ELMs, such as DT3 Supply Cabinets, or DTER Refrigerators. Remember that you are not describing one cabinet or lock, but up to eight devices.

- The system fills in the sequence number automatically.

Refer to the table on page 215 for an explanation of the fields.

7. Click the Save icon.

Note: If a DT hasn't been specified for a new cabinet, the system will ask you to assign a DT.

Working with Electronic Lock Ports

The Electronic Lock Controller Configuration window indicates which ports on the controller card are used. There are eight ports on the controller card, which correspond to the eight choices in the window. When you click on the button to select a connector, the module number (for instance, Module 7) is displayed. Select each port that has a dispensing device connected to it.

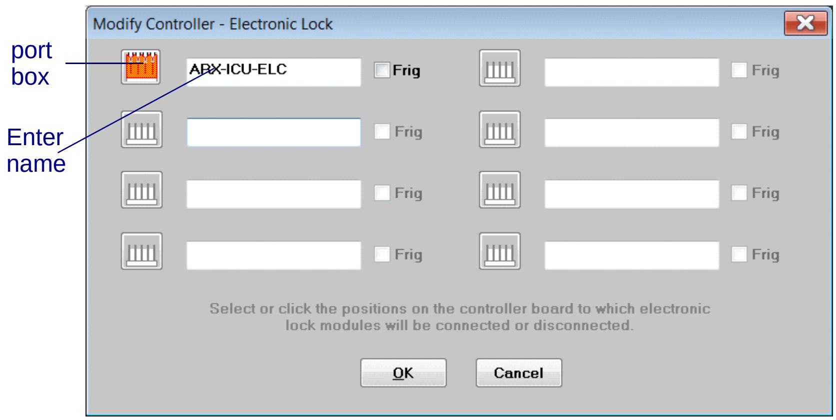
In place of the module number, type a description of the cabinet or device that is attached to that port. Examples of descriptions are OR Supply Cabinet 3 or ER Refrigerator 1.

Assigning ELC Ports

Follow the steps below to assign an ELC port.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.

4. Select a cabinet from the Cabinet drop-down box.
5. Click ***Configure*** to open the Electronic Lock window.



6. Click on the port box. It will turn orange.
7. Type over the temporary description in the text box adjacent to the orange port box and replace it with the actual module name.

Note: Generally, the refrigerator goes in the first port.

8. Click on the port box below the one you just configured and repeat the process for all the remaining ports.
9. Click ***OK*** to save or ***Cancel*** to close without saving.

Configuring Positions in ELCs

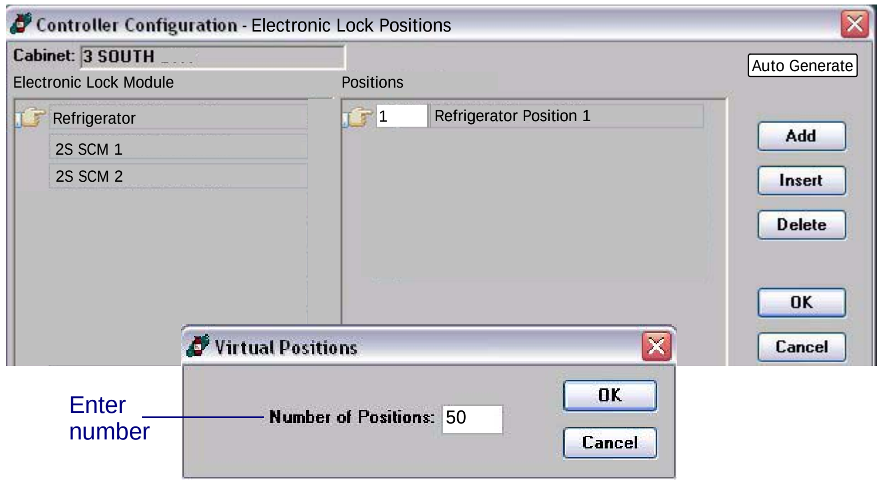
By default, all electronic lock modules contain one position. However, you can create as many positions as needed inside of an ELM. For SCMs, each position is a divided area you create with the movable dividers on a cabinet shelf.

Adding Positions

Follow the steps below to add a position.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal that will support this cabinet from the Display Terminal drop-down box in the Controller Configurations window.
4. Select the cabinet controller that drives the modules you want to divide from the Cabinet drop-down box.
5. Click ***Positions*** to open the Controller Configuration - Electronic Lock Positions window.

   All existing ELMs supported by that controller are displayed. ELMs are in the left pane and positions are in the right pane.



6. Click ***Add*** to add each successive individual position or click ***Insert*** to insert an individual position before a selected position.
7. Click ***Auto Generate*** to automatically add multiple positions. A pop-up window will appear.
8. When the pop-up appears, enter the number of positions you want to generate (for example, enter 50 to create 50 positions inside the module), and then click ***OK***.

Note:If the Auto Generate button is not available, then you have already created positions for this shelf. To auto generate positions again, you must first delete all existing positions except for position 1.

9. Click ***OK*** to save or ***Cancel*** to close without saving.

Deleting Positions

Follow the steps below to delete a position.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal that will support this cabinet from the Display Terminal drop-down box in the Controller Configurations window.
4. Select the cabinet controller that drives the modules you want to divide from the Cabinet drop-down box.
5. Click ***Positions*** to open the Controller Configuration - Electronic Lock Positions window.

   All existing ELMs supported by that controller are displayed. ELMs are in the left pane and positions are in the right pane.

6. Select the position you want to delete in the right pane.
7. Click ***Delete***; a confirmation window appears.
8. Click ***Yes*** to confirm the deletion.
9. Click ***OK*** to save or ***Cancel*** to close without saving.

Note: The system will not allow you to delete an electronic lock if the lock is currently active (has positions assigned to it) within the MedSelect Flex system. You must first delete all positions assigned to the ELC.

Creating/Configuring Controllers for Tower Modules

Once you have added the cabinet names and locations, you must configure the controllers.

Each module comes with its own installation worksheet, which provides the information needed to configure that specific module as it was ordered by the facility.

Refer to the sample TM installation worksheet on page 235 for setup including the controller address, position, and shelf description.

TM Installation Worksheet

SST (SupplySource Tower)
Installation Worksheet

Date Built:
3/15/2004

Site: Children's Hospital
Sales Order Number: 04-100296-03
Location: EDTC SST
Cabinet Description:
Key / Lock Number: MS5037
Serial Number: 646A-MC01-00184

Cabinet P/N and Type: 00-101646-000B Economy SupplySource Cabinet
Hinge Side: Left
Lighting Kit: ☑
Controller Address: 0C302101

Pos.	Shelf or Cath Base Part Number	Shelf or Cath Base Description	Cath Rail Qty	Cath Rail Part Number	Cath Rail Description
1	None				
2	49-017110-000A	Fixed Economy Shelf			
3	None				
4	49-017110-000A	Fixed Economy Shelf			
5	None				
6	49-017110-000A	Fixed Economy Shelf			
7	None				
8	49-017110-000A	Fixed Economy Shelf			
9	49-017164-000A	Single Sliding Economy Shelf			
10	49-017164-000A	Single Sliding Economy Shelf			
11	49-017164-000B	Double Sliding Economy Shelf			
12	None				
13	None				
14	None				
15	None				
16	49-017110-000A	Fixed Economy Shelf			

SAMPLE

INSTALLER - RECORD THE FOLLOWING:
1. Alternate location if different than above.
2. Cabinet Description.
3. Any configuration changes.
4. Location and Cabinet Description on key tags.
5. Key/lock number on key tracking form.
6. Retain this form for database configuration. DO NOT DESTROY

You must have the configuration right to create and maintain controllers. Refer to Adding a User on page 73.

There are two methods to create/configure controllers for TMs.

The first method is to begin by selecting Configuration in the Maintenance list and then selecting Controller to open the Controller Configuration window.

Follow the steps below to create/configure TMs.

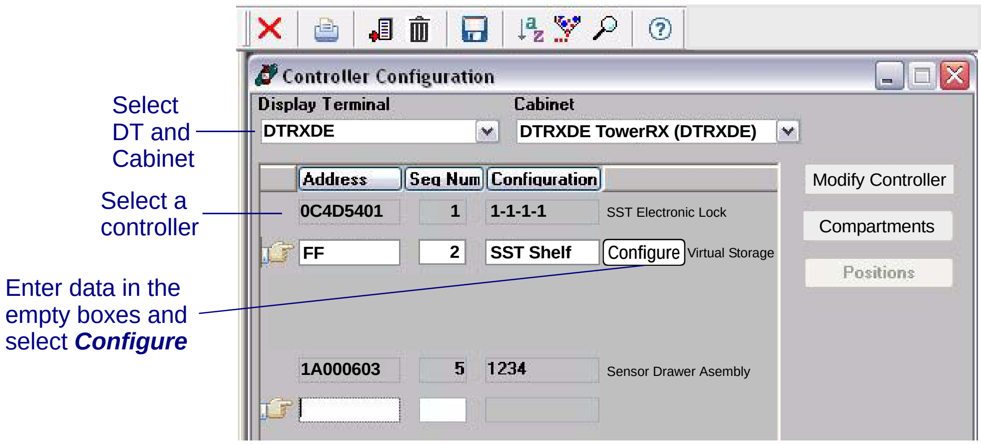
1. Select the DT that will support the new tower from the display terminal drop-down box.
2. Select the tower that you want to configure in the cabinet drop-down box.
3. Click the Add icon on the toolbar of the Controller Configuration window to open new fields.

   Refer to step 4 on page 237 to continue the configuration process.

The second method to create/configure controllers is to begin by selecting Configuration in the Maintenance list and then selecting Cabinets to open the Cabinet Configuration window.

Follow the steps below to create/configure TMs.

1. Select the tower that you want to configure.
2. Click ***Controllers*** to open the Controller Configuration window.
3. Click the Add icon on the toolbar of the Controller Configuration window to open new fields.



4. Enter the data into the fields. Observe these criteria for standard and catheter rail controllers:

   - The first address for a standard tower controller must begin with 0C (a zero and the letter C). Use 0E (a zero and the letter E) for a tower catheter rail controller. This is always the electronic lock.
   - The remaining (shelf) addresses must begin with the letters FF. The rest of the sequence numbers are generated automatically when the configuration is saved.
   - Enter sequence number 1-4 to place the shelf behind door one. Enter 5-8 for door two, 9-12 for door three, and 13-16 for door four.

Refer to the table on page 215 for an explanation of the fields.

5. Click the Save icon.

Note: If a DT hasn't been specified for a new cabinet, the system will ask the user to assign a DT.

Configuring Shelf Positions

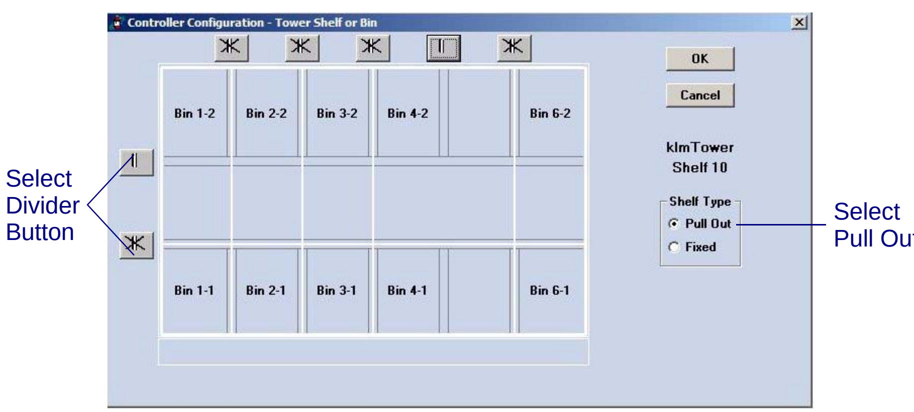
Configuring Pull-Out Shelf Positions

You can configure positions for each pull-out shelf to accommodate your supplies. Pull-out shelves support 18 positions.

Follow the steps below to configure pull-out shelf positions.

1. Click ***Configure*** on the Controller Configurations window to open the tower shelf window.
2. Select the Pull Out option button.
3. Select divider buttons to configure (divide) the grid.

   Select the divider buttons on the side to set the vertical configuration. Select the divider buttons on the top to set the horizontal configuration.



4. Click ***OK*** to save or ***Cancel*** to close without saving.

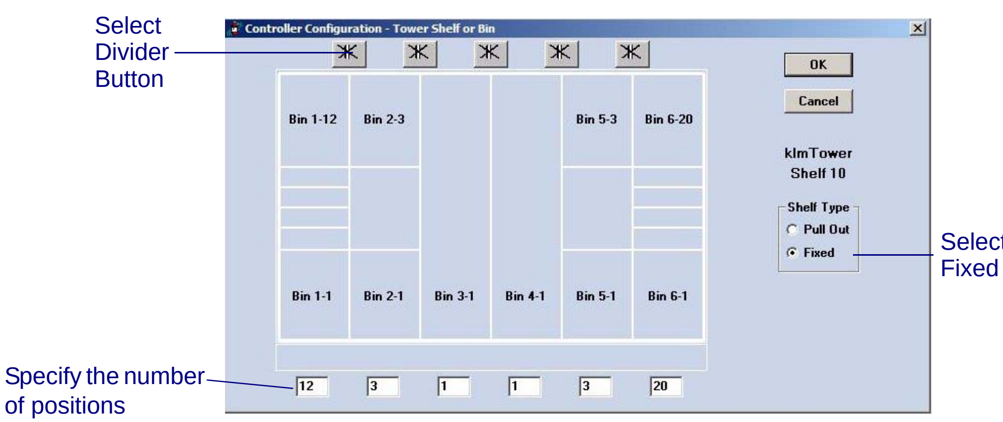
Note: The bottom of the displayed shelf/bin is considered the front of the shelf when you open the tower door.

Configuring Fixed Shelf Configurations

You can configure positions for each fixed shelf to accommodate your supplies. The fixed shelf type can support up to 50 positions per column; however, ABTG recommends a maximum of 20 positions.

Follow the steps below to configure fixed shelf positions.

1. Click ***Configure*** on the Controller Configurations window to open the following tower shelf window.
2. Select the Fixed button.
3. Click a divider button to configure (divide) the grid.



4. Use the edit box below each divider to specify the number of positions to be supported. The front and back bin designations are indicated.

5. Click ***OK*** to save or ***Cancel*** to close without saving.

Modifying or Replacing a Same-Type Controller

You can modify or replace a controller if necessary.

There are two methods to modify or replace controllers for all devices.

The first method is to begin by selecting Configuration in the Maintenance list and then selecting Controller to open the Controller Configuration window.

Follow the steps below to modify or replace controllers.

1. Select the DT that will support the new module from the display terminal drop-down box.
2. Select the cabinet that you want to configure in the cabinet drop-down box.

3. Click Controllers to open the Controller Configuration window.

   Refer to Modifying a Controller on page 241 and Replacing a Controller on page 242 to continue the configuration process.

The second method to modify or replace controllers is to begin by selecting Configuration in the Maintenance list and then selecting Cabinets to open the Cabinet Configuration window.

Follow the steps below to modify or replace controllers.

1. Select the cabinet that you want to configure.
2. Click ***Controllers*** to open the Controller Configuration window.

   Refer to Modifying a Controller and Replacing a Controller to continue the configuration process.

Modifying a Controller

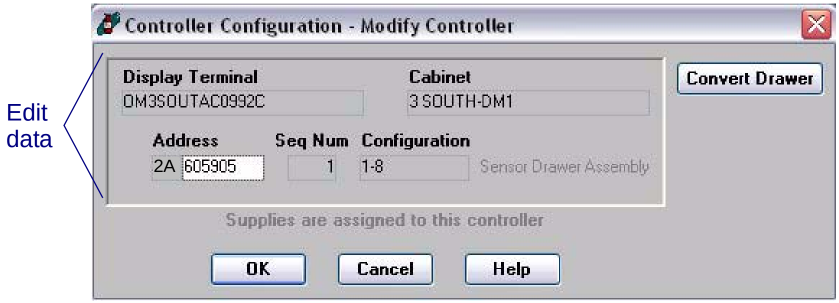
You may want to change a controller's configuration to accept a different drawer or shelf. For instance, you may want to change a DM controller that supports a "B" drawer assembly (medium drawers) so that it supports an "A" assembly (small drawers). To do so, you must unassign each of the supplies in the original drawers (refer to Unassigning Supplies from Positions on page 314). You can then modify the controller's configuration, including the address.

Note: If the controller has supplies assigned to it, then you are only able to edit the address of the controller (the 2-digit prefix cannot be edited to ensure that this controller type remains the same). If not, then you can modify everything.

Follow the steps below to modify a controller.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select the controller you want to modify.

4. Click ***Modify Controller*** to open the Controller Configuration - Modify Controller window.



5. Change the data to match the new controller.

Note: If the controller you are modifying is an electronic lock controller, then you cannot modify the DT. Also, the Modify Controller window has a button called Change Config. Click this button to open a window that lets you change the port assignments for the SCMs and ELMs that use this controller and the SCM/ELM descriptions (refer to page 229).

Note: If the controller you are modifying is a standard drawer (1A) or SIA Drawer (2A) assembly, you can toggle one to the other by clicking the Convert Drawer button.

6. Click ***OK*** to save or ***Cancel*** to close without saving.

Replacing a Controller

If a drawer/shelf fails to operate because the controller failed, you can replace the controller.

You can replace an old controller with a new controller only if the controllers are the same type. This means that the two controllers must have the same 2-digit prefix in their address. For instance, you can replace a standard drawer module controller with another standard drawer module controller (prefix of 1A). You cannot replace a unit dose module solids dispenser controller (prefix of 18) with an injectables dispenser controller (prefix of 17).

Follow the steps below to replace a controller.

1. Select Configuration on the Maintenance menu.
2. Choose Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box in the Controller Configurations window.
4. Select a cabinet from the drop-down box.
5. Select the controller you want to replace.
6. Click ***Modify Controller*** to open the Controller Configuration - Modify Controller window. Supplies do not have to be unassigned.
7. Change the data to match the new controller.
8. To replace the controller with a different type, delete it (refer to Deleting Controllers on page 244), then create the new controller.

   Refer to the following pages to create new controllers for the various devices:

   - Creating/Configuring Controllers on page 210.
   - Creating/Configuring Controllers on page 225.
   - Creating/Configuring Controllers for Tower Modules on page 234.
9. When done, change the address in the AWS.

Deleting Controllers

Deleting a controller causes all associated positions to be deleted. You cannot delete a controller if there are supplies assigned to its positions. If you know you want to delete all of the controllers in a cabinet, it may be quicker to delete the entire cabinet (see page 209), which also deletes all of its associated controllers.

Deleting Individual Controllers

Follow the steps below to delete an individual controller.

1. Select Configuration in the Maintenance list.
2. Select Controller to open the Controller Configuration window.
3. Select a display terminal from the Display Terminal drop-down box.
4. Select a cabinet from the drop-down box.
5. Click Delete in the toolbar; a confirmation window appears.
6. Click ***Yes*** to confirm the deletion.
7. Click the Save icon.

Copying a Cabinet

You can create a new cabinet from an existing cabinet. The new cabinet will have a new description and location, but will retain the same positions and supply assignments as the original cabinet.

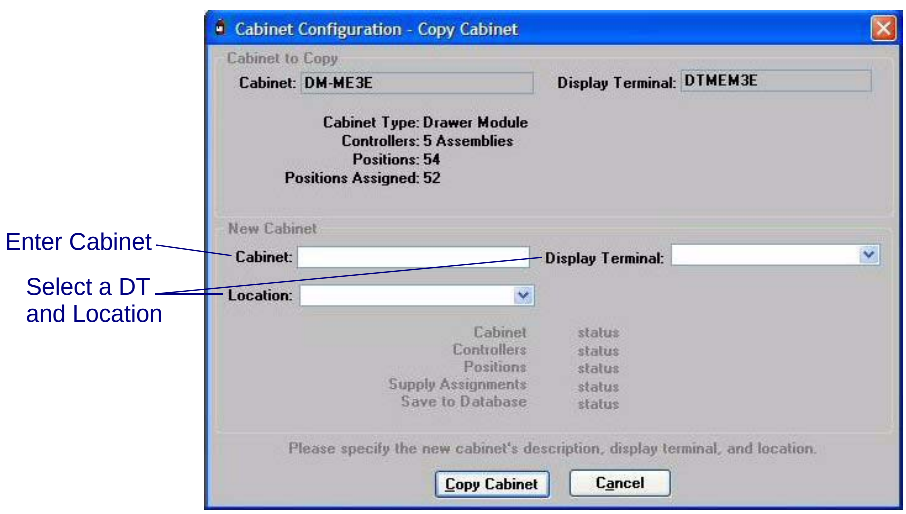
Stock quantities for a new cabinet are set at zero (0).

You must update all new controller addresses for the new cabinet controllers except virtual storage.

Follow the steps below to copy a cabinet.

1. Select Configuration in the Maintenance list.
2. Select Cabinet to open the Cabinet Configuration window.
3. Select a cabinet.
4. Select Data in the toolbar, then select Copy Cabinet or click the Copy icon in the toolbar to open the Copy Cabinet window.
5. Enter the new cabinet name and select the new DT and location.
6. Click ***Copy Cabinet*** to create a new cabinet with the same positions and supply assignments as the original cabinet.

   The system will generate controller addresses for the new cabinet.



Notes:

Centrack Stations

Centrack is a separate software application that simplifies record-keeping and supply tracking of controlled substances in the pharmacy. Centrack tracks medications that are stocked, retrieved, unloaded or expired until they are returned to Centrack, placed into quarantine, returned to the pharmacy, or destroyed.

If your system does not use the Centrack software, you may disregard this chapter.

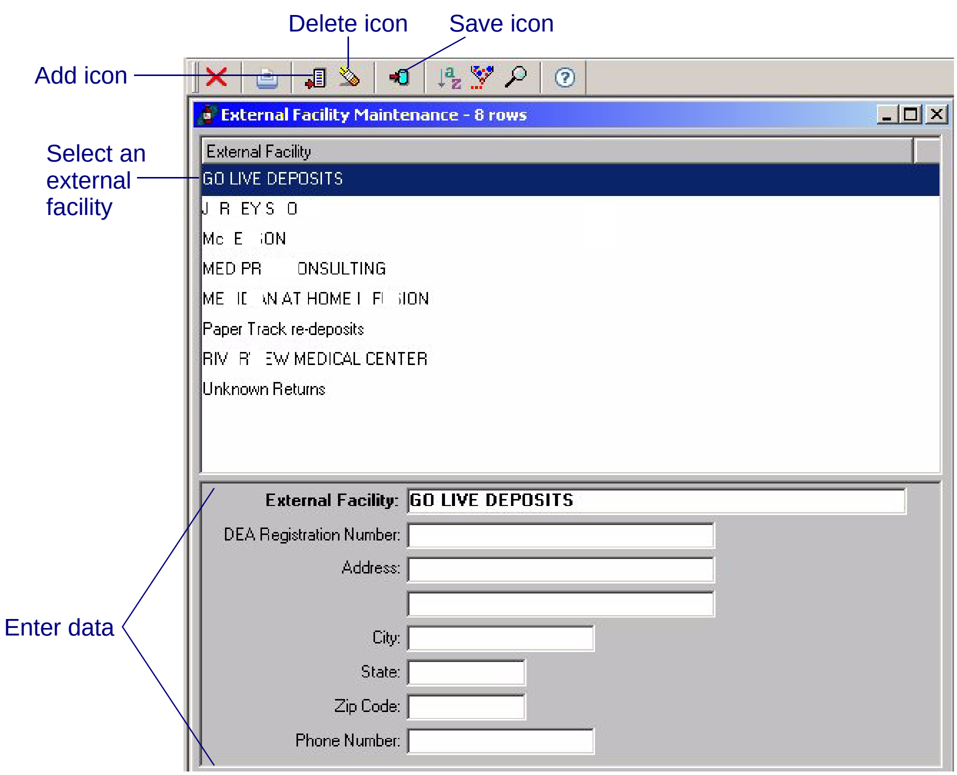
You can work with Centrack in AWS after you configure the external facility and withdraw groups. After configuration, you will then see the External Facility and Withdraw Group options on the Maintenance menu. You must have the maintenance right to maintain external facilities and withdraw groups. See Adding a User on page 73 for information on setting rights.

Note: You must create a separate department for Centrack.

Working with External Facilities

You must track all outside facilities that loan, borrow, or sell medications to/from your system. These facilities may include other hospital systems or drug wholesalers. The names of external facilities you create here will appear within the Centrack application.

Select External Facility on the Maintenance menu to open the External Facility Maintenance window below. From this window you can add, edit, or delete external facilities.



Adding an External Facility

Follow the steps below to add a new facility.

1. Select External Facility on the Maintenance menu to open the External Facility Maintenance window.
2. Click Add in the toolbar of the External Facility Maintenance window.
3. Enter the required Facility Name (60 characters maximum). Enter the optional data in the other fields, if desired.

   Refer to the table below for an explanation of the fields.

4. Click the Save icon.

Editing an External Facility

Follow the steps below to edit a facility.

1. Select External Facility on the Maintenance menu to open the External Facility Maintenance window.
2. Select a facility on the External Facility Maintenance window.
3. Edit data as necessary.

   Refer to the table below for an explanation of the fields.

4. Click the Save icon.

External Facility Field Definitions

Refer to the following table for an explanation of each of the External Facility fields.

Field	Explanation
External facility	The name of the facility.
DEA Registration Number	The facility's DEA registration number.
Address	The facility address.
City	The city where the facility resides.
State	The state where the facility resides.
ZIP Code	The ZIP code of the facility
Phone Number	The telephone number of the facility

Deleting an External Facility

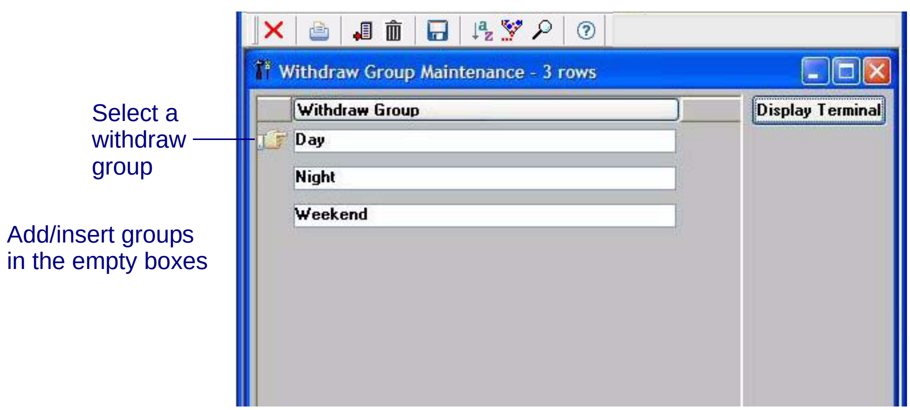
Follow the steps below to delete an external facility.

1. Select External Facility on the Maintenance menu to open the External Facility Maintenance window.
2. Select the facility you want to delete on the External Facility Maintenance window.
3. Click the Delete icon; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Working with Withdraw Groups

You may want to create a withdraw group if you have a group of DTs that store controlled medications and are restocked by pharmacy personnel. The purpose of a withdraw group is to assist in the restocking process. For example, if the pharmacy is responsible for restocking six stations at 10:00 a.m., the six stations may be formed into a withdraw group. At the time of withdraw from Centrack, you can select the withdraw group in the lower right corner of the Withdraw window. Then, the medications and the six DTs for that specific withdraw will appear, and you will not have to select each DT individually.

Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window, shown below. From this window you can add, edit, or delete withdraw groups.



Adding a Withdraw Group

Follow the steps below to add a new withdraw group.

1. Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window.
2. Click the Add icon on the toolbar of the Withdraw Group Maintenance window to open a new field in the Withdraw Group column.
3. Enter the withdraw group name in the list.
4. Click Save in the toolbar.

   After you add a withdraw group, you can assign DTs to the withdraw group. To do this, refer to Assigning DTs to Withdraw Groups on page 253.

Editing a Withdraw Group

Follow the steps below to edit a withdraw group.

1. Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window.
2. Select a withdraw group on the Withdraw Group Maintenance window.
3. Edit the fields as necessary.
4. Click the Save icon.

   After you edit the information on the Withdraw Group Maintenance window, you can assign or unassign DTs to or from the withdraw group, if necessary, referring to Assigning DTs to Withdraw Groups on page 253 and Unassigning

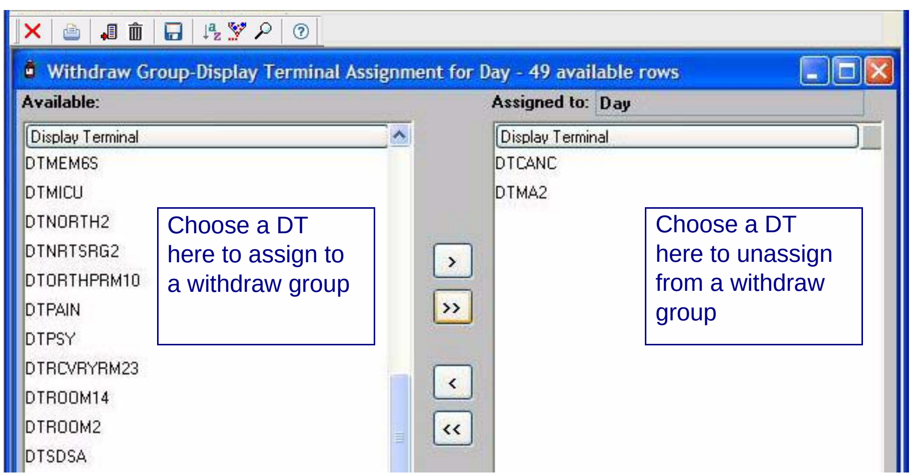
DTs from Withdraw Groups on page 254.

Assigning DTs to Withdraw Groups

You must have the maintenance right to assign DTs to withdraw groups.

Follow the steps below to assign a DT to a withdraw group.

1. Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window.
2. Select a withdraw group on the Withdraw Group Maintenance window.
3. Click ***Display Terminal*** to open the Display Terminal Assignment window.



4. Select a DT in the left colmun of the Display Terminal Assignment window, and click the > arrow to assign the DT to the withdraw group or

click the >> arrows to assign all DTs to the withdraw group.

You can also drag and drop DT names from one side of the window to the other.

5. Click the Save icon.

Unassigning DTs from Withdraw Groups

Follow the steps below to unassign a DT to a withdraw group.

1. Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window.
2. Select a withdraw group on the Withdraw Group Maintenance window.
3. Click ***Display Terminal*** to open the Display Terminal Assignment window.
4. Select a DT in the right column and click the < arrow to unassign the DT from a withdraw group or click the << arrows to unassign all DTs from the withdraw group.
   You can also drag and drop DT names from one side of the window to the other.
5. Click the Save icon.

Deleting Withdraw Groups

Follow the steps below to delete withdraw groups.

1. Select Withdraw Group on the Maintenance list to open the Withdraw Group Maintenance window.
2. Select a withdraw group on the Withdraw Group Maintenance window.
3. Click the Delete icon; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Notes:

Patient Information

Using the Patient Browser, you can view open and on-hold patient information and retrieve closed patient visits for viewing.

You can add, edit, and delete patients, and their records and/or visits. You can also merge patient records and transfer supplies.

The Patient Detail window has three tabs which display the following information:

- Demographics: This tab contains personal patient information and current visit information. Refer to Working with Patient Details on page 260.
- MedOrders: This tab contains MedOrder information for the selected patient. Refer to Working with Patient MedOrders on page 268.
- Usage: This tab contains details of the patient's medication/supplies usage. Refer to Working with Patient Usage on page 272.

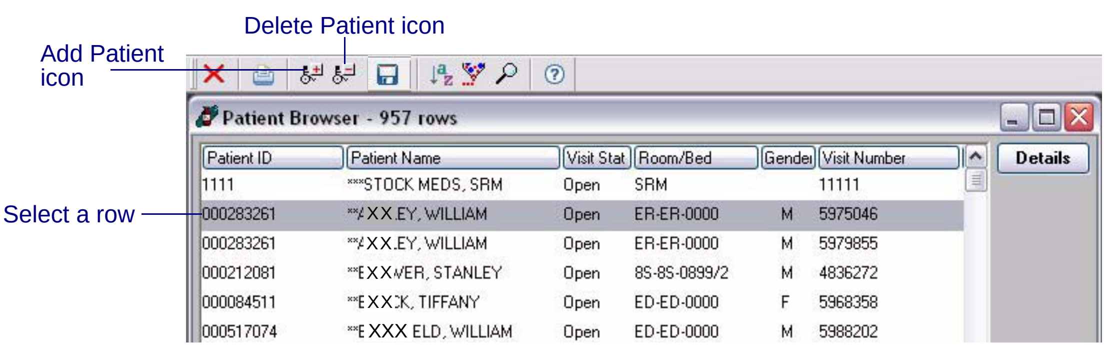
You must have AWS and patient management access rights to add, edit, or delete patient and visit records.

You must have account adjustment rights to adjust or merge patient/visit records, transfer supplies, and merge patient visit records. Assign the AWS, management, and account adjustment rights. Refer to Adding a User on page 73 to learn more about assigning user rights.

Working with the Patient Browser

To begin working with open or on-hold patient information, follow these steps:

1. Select Patient on the Management menu to open the Patient Browser below.
2. Click Data on the toolbar of the AWS main window and select Refresh Browser to update the browser.



Select any column heading to sort the information on this window by that column.

Note: You cannot edit information on the Patient Browser.

Retrieving a Patient

A patient is not listed on the Patient Browser if all the patient's visits have been closed. However, you can retrieve, re-open, or add a visit when this occurs.

Follow the steps below to retrieve a patient visit.

1. Select Patient on the Management menu to open the Patient Browser.
2. Click Data on the toolbar of the AWS main window.
3. Select Locate Patient Without Open Visit to open the Locate Patient Without Open Visit window.
4. Choose a search criteria (Admission Date, Patient ID Number, or Patient Last Name) from the drop-down box in the Search column.
5. Choose an operator (= or Begins), and type the letters (not case sensitive) or number value to search for in the Value field.
6. Click ***Search***.

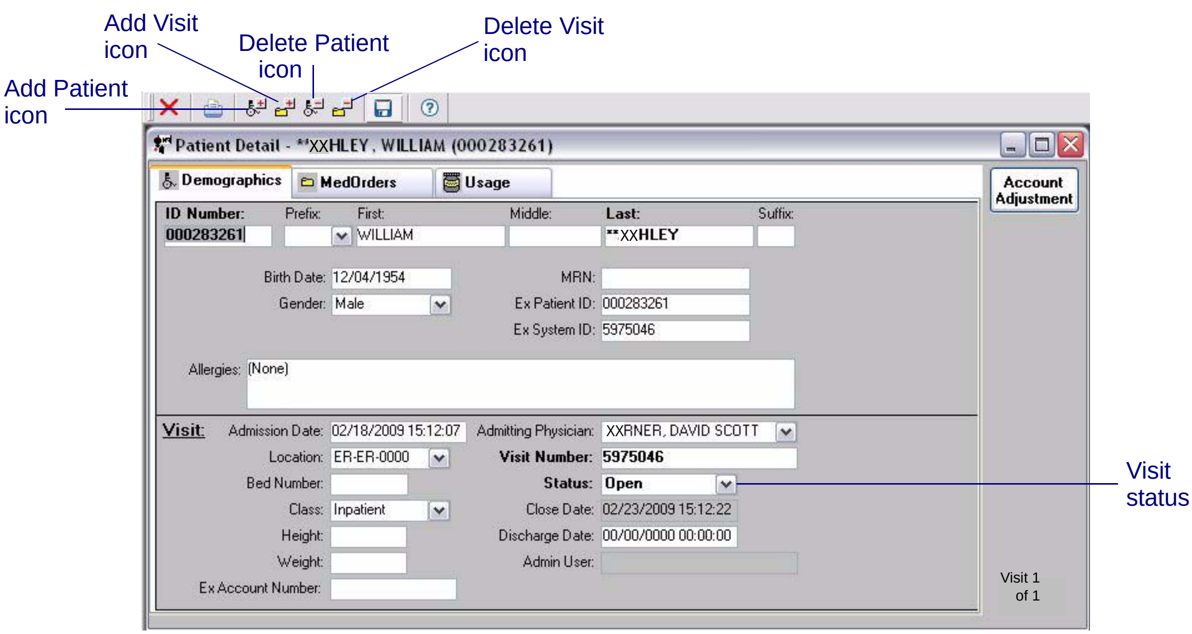
   All records matching the criteria display in the results window. If no records are found, click ***Reset*** to clear the criteria and try again.

7. Select the visit you want from the results window, and click ***Select*** or double-click to select it. The patient visit is displayed in the Patient Browser.
8. Click the Save icon.
   Once you retrieve a closed visit, you can view it prior to closing the Patient Browser. However, the next time you open the browser, the record will not be displayed.

Note: You must change the status on the detail window to either on-hold or open to be able to view the retrieved visit on the Patient Browser after you close it. To do this, refer to Editing a Patient on page 261 for more information on changing status.

Working with Patient Details

Select a patient on the Patient Browser, then click Details. The Patient Details window below appears. The default view is that of the Demographics tab. Patient information is in the top pane, and visit information and current status are in the bottom pane. From this tab you can add, edit, and delete patients, and also add, edit, and delete patient visits.



Adding a Patient

Follow the steps below to add a patient.

1. Select Patient on the Management list to open the Patient Browser below.
2. Click the Add Patient icon in the toolbar of the Patient Browser to open a blank Patient Detail window.
3. Enter data in the fields and drop-down boxes as necessary, referring to the field descriptions in the table on page 267. Use the following criteria:
    - Bold fields require data. (The Status field defaults to Open.)
    - The visit number must be unique.
    - The Location and Class fields are required for display at the DT and discharging a patient.
4. Click the Save icon.

Editing a Patient

Follow the steps below to edit a patient.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Modify data in the fields and drop-down boxes as necessary, referring to the field descriptions in the table on page 267. Use the following criteria:

- Bold fields require data
- The visit number must be unique
- The location and class fields are required for display at the DT and discharging a patient

4. Select either On-hold or Open in the Status drop-down box to be able to view the patient on the browser.

5. Click the Save icon.

Deleting a Patient

Note: The system will not allow you to delete a patient if the patient record has had supply transactions (events). If this condition exists, a message window notifies you. Supply transactions are cleared, along with old visits and patient records, by a site-scheduled server job.

There are two ways to delete a patient. Follow the steps below to delete a patient from the Patient Detail window.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select Close in the Status drop-down box.
4. Click the Save icon.
5. Click the Delete Patient icon; a confirmation window appears.

6. Click ***Yes*** to confirm the deletion. The patient is deleted from the Patient Browser.

Follow these steps to delete a patient from the Patient Browser.

1. Select Patient on the Management list to open the Patient Browser below.
2. Select a patient row on the Patient Browser.
3. Click Data on the toolbar of the patient browser and select Close Visit.
4. Click the Save icon.
5. Click the Delete Patient icon; a confirmation window appears.
6. Click ***Yes*** to confirm the deletion. The patient is deleted from the Patient Browser.

Working with Patient Visits

The bottom portion of the Demographics tab on the Patient Detail window provides visit information. You can close and add, edit, or delete patient visits.

Only one patient visit can have an open or on-hold status. If you try to create an open/on-hold visit when such a visit already exists, a pop-up window appears to alert you. Click ***OK*** to close the pop-up window.

Only open visits are displayed at the DT. However, you can view multiple patient visits by selecting Data on the Patient Detail window and then selecting Previous Visit or Next Visit to open its respective patient detail.

Adding Patient Visits

You can have multiple visits for a patient and record each new visit so you can refer back and forth among them. Each new visit has a default status of Open, consequently, you must close the previous open status when you wish to add a new visit.

Follow the steps below to add a patient visit.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select Closed in the Status drop-down box.
4. Click the Save icon.
5. Click the Add Visit icon.
6. Enter data in the fields and drop-down boxes as necessary, referring to the field descriptions in the table on page 267. Use the following criteria:
   - Bold fields require data. (Status defaults to Open)
   - The visit number must be unique
   - The location and class fields are required for proper display at the DT and discharging a patient
7. Click the Save icon.

Editing a Current Patient Visit

Follow the steps below to edit a current patient visit.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Modify data in the fields and drop-down boxes as necessary, referring to the field descriptions in the table on page 267. Use the following criteria:
    - Bold fields require data
    - The visit number must be unique
    - The location and class fields are required for proper display at the DT and discharging a patient
4. Click the Save icon.

Editing a Previous or Next Visit

Follow the steps below to edit a patient's previous or next visits.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select Data on the Patient Detail window and then select Previous Visit or Next Visit to open its respective patient detail.

4. Modify data in the fields and drop-down boxes as necessary, referring to the field descriptions in the table on page 267. Use the following criteria:

    - Bold fields require data
    - The visit number must be unique
    - The location and class fields are required for proper display at the DT and discharging a patient

5. Click the Save icon.

Deleting Patient Visits

Note: You cannot delete a visit if it is the only one on record. If you attempt to do so, a pop-up window alerts you.

*Note: If there are multiple visits, you can delete any that are closed, but a pop-up window appears stating that the deletion cannot be undone. Click **Yes** to delete the visit and close the pop-up window.*

Follow the steps below to delete a patient visit.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select Close in the Status drop-down box.
4. Click the Save icon.
5. Click the Delete Visit icon; a confirmation window appears.

6. Click ***Yes*** to confirm the deletion.

Patient Detail Field Definitions

Refer to the following table for an explanation of each of the Patient Detail fields.

Field	Explanation
ID Number	The unique number to identify a patient (20 characters maximum). If this field is blank in an existing record, the patient was added at the DT. If record modifications are made at the AWS, populate this field before saving.
Prefix	Titles such as Dr., Mr., etc.
First, Middle and Last	The patient's name (15 characters each maximum).
Suffix	Descriptors following a name, such as Jr., III, etc.
Birth Date	The patient's date of birth.
Gender	The patient's gender.
MRN	The medical record number assigned to the patient (20 characters maximum).
External Patient ID, External System ID	A unique identifier for a patient to an external system (45 and 20 characters maximum, respectively).
Allergies	The description of drug allergies the patient may have (450 characters maximum).
Admission Date	The date a patient was admitted.
Location	The room where the patient is staying.

Field	Explanation
Bed Number	The bed number for the patient.
Class	The description of the patient's admission.
Height, Weight	The patient’s height and weight.
External Account Number	A unique patient billing account number (20 characters maximum).
Admitting Physician	The physician’s name.
Visit Number	A unique number assigned to identify the patient's visit (15 characters maximum).
Status	The current status of the patient's visit, which can be either Open, On-hold, or Closed.
Close Date	The date and time a visit was closed.
Discharge Date	The patient release date and time.
Admin User	The last administrator to update a visit.

Working with Patient MedOrders

Choose the MedOrders tab (on the Patient Details window) to view a selected patient’s MedOrders. MedOrders are physician orders reviewed by pharmacy and dispensed to patients based on patient profile. You can discontinue or reinstate a MedOrder on the MedOrders tab. The information you see on the MedOrders tab comes directly from the system interface and cannot be edited in AWS.

To begin working with patient MedOrders, select Patient on the Management list to open the Patient Browser.

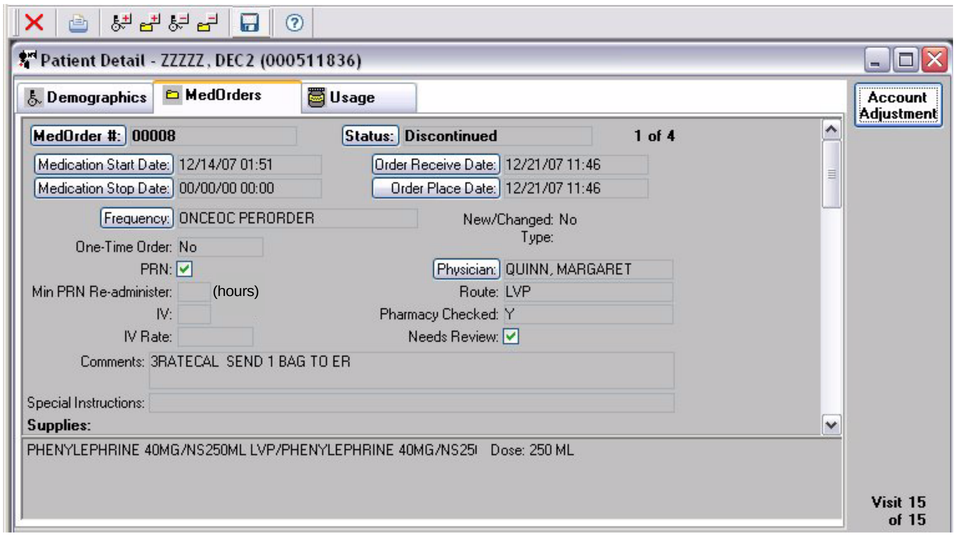
Discontinuing a MedOrder

When you discontinue (or dismiss) a MedOrder, the MedOrder is no longer available at the DT but you can view it by selecting Show All on the MedOrder Browser. You cannot resume a discontinued MedOrder; there must be a new MedOrder via the system interface to the site's MedOrder or order entry system.

Follow the steps below to discontinue a MedOrder.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select the MedOrders tab to view MedOrders associated with the patient's current visit.

You can view other MedOrders associated with other visits by selecting Data on the toolbar and then selecting Previous Visit or Next Visit.



4. Select Data on the toolbar of the MedOrders window and select Discontinue MedOrder; a confirmation window appears.

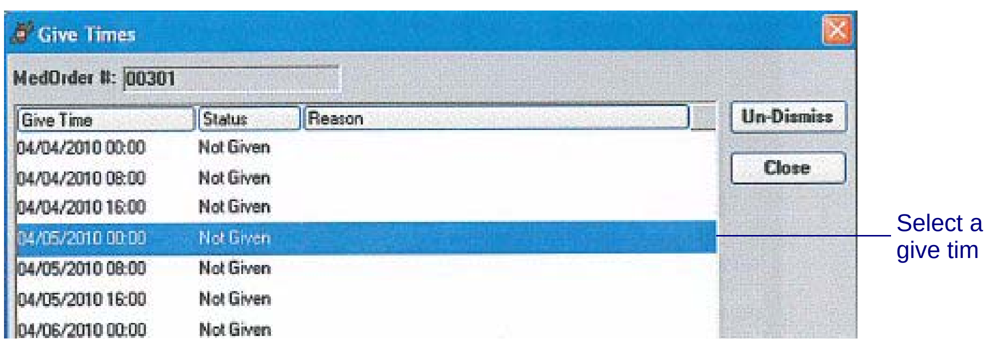
   If the patient has more than one MedOrder, you can scroll through them using the scroll bar at the right side of the window, or you can use the Page Up and Page Down keys on your keyboard.

5. Click ***Yes*** to confirm the discontinuation.
6. Click the Save icon.

Reinstating a Give Time for a MedOrder

You can reinstate MedOrder give times that are dismissed at the DT. Follow the steps below to reinstate a MedOrder give time:

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Select the MedOrders tab to view MedOrders associated with the currently displayed visit.
4. Locate the MedOrder for the dismissed give time, which is indicated on the Status field as Discontinued.
5. Select Data on the toolbar and select Un-dismiss Give Time to open the Give times window.



6. Select a give time and click ***Un-dismiss***. The MedOrder will reappear on the DT.

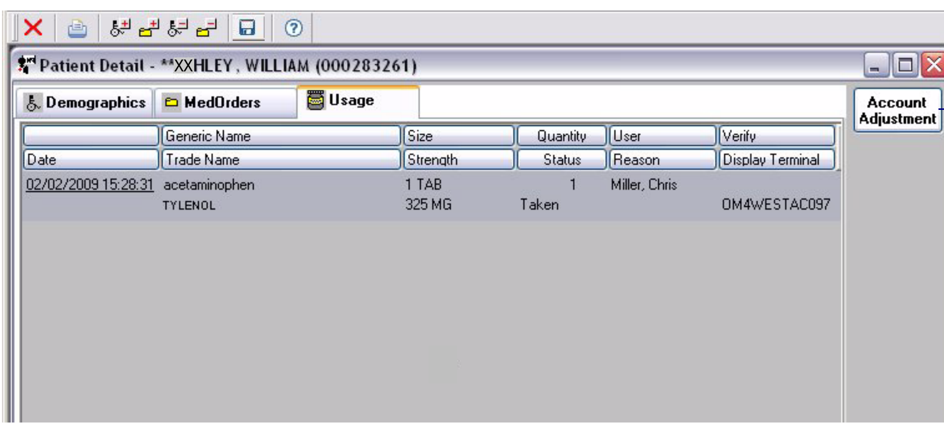
Working with Patient Usage

Choose the Usage tab (on the Patient Details window) to view the current status for dispensed, returned or wasted medications for a patient. You cannot change the information on the Usage tab.

Follow the steps below to view patient usage.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Click ***Account Adjustment*** to open the Account Adjustment window like that shown below.

4. Select the Usage tab.



Account Adjustment

Adjusting and Merging Patient/Visit Records

You can transfer supplies from one patient to another (see page 273), merge visit records for the same patient (see page 275), or merge two different patient records (see page 277).

You can access Account Adjustment from any of the Patient detail tabs.

Note: Never create more than one patient record per patient.

Transferring Supplies from One Patient to Another

When a supply is taken or dispensed, it is attributed to the patient that was selected at the DT. You can transfer supply events from one patient to another if a supply was attributed to the wrong patient.

The following rules apply when you transfer supplies:

- You can only transfer events with a status of Taken or Taken Transfer In.
- If a supply was taken and then returned, and you transfer the taken event to another account, the corresponding return event is transferred also.
- If a supply was taken and then wasted and you transfer the taken event to another account, the wasted event is transferred also.
- A discrepant taken event will have a resolution event associated with it (Dept Resolved Charge or Dept Resolved Credit). If you transfer the taken event, the quantity of the

new taken transfer in event is updated to reflect the adjustment.

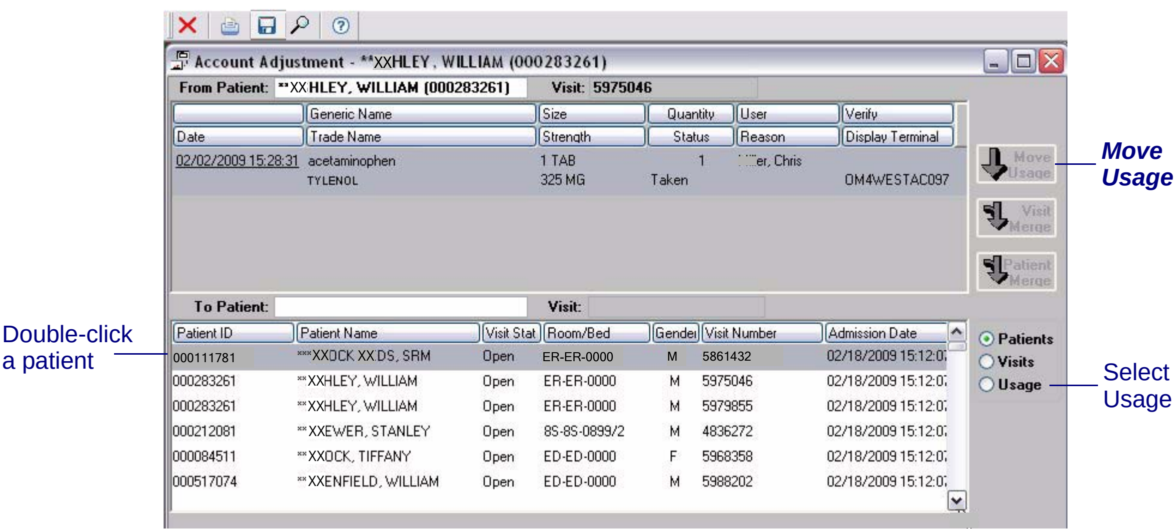
- You cannot transfer a supply event that has a MedOrder associated with it. If you attempt to do so, a pop-up window appears to alert you. Click ***OK*** to close the pop-up window.

Follow the steps below to transfer a supply usage.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.

Note: Make sure you select the appropriate patient visit, which you will then see in the Patient Detail (Usage) window.

3. Click ***Account Adjustment*** to open the Account Adjustment window (Transfer Usage).



4. Double-click the patient to whom you want to move the supply in the bottom pane of the browser.
5. Select the Usage button.
6. Select the supply you want to move in the top pane of the browser.
7. Click ***Move Usage*** to move the supply from the top pane of the browser to the bottom pane.

*Note: You cannot move a MedOrder. If you attempt to do so, a pop-up window appears to alert you. Click **OK** to close the pop-up window.*

8. Click the Save icon.

Merging Visit Records for the Same Patient

You can merge two visit records, one of which is open and the other is closed. This may be required if a patient is admitted in the emergency room and the record status is closed. A new record is opened when s/he is admitted to a hospital room. These two records will be combined into one continuous open visit.

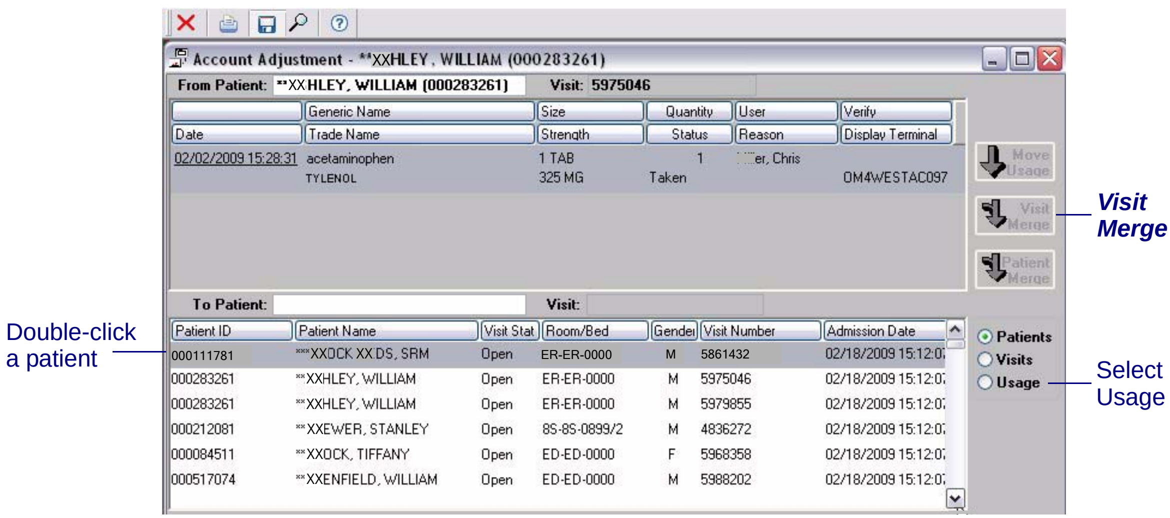
Note: If you merge visit “A” into visit “B”, note that all supply transactions from visit “A” become the property of visit “B”. All visit “A” information will then be deleted.

Follow the steps below to merge visit records for the same patient.

1. Select Patient on the Management list to open the Patient Browser below.

2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Click ***Account Adjustment*** to open the Account Adjustment window (Visit Merge).

   The window has two panes. The top pane displays the visit record that will be merged with the new visit record - this is the sending account. The bottom pane is a visit pane. The visit you select here is the receiving account.



4. Double-click the patient whose visits you want to merge (in the bottom pane of the browser).
5. Select the Usage button.
6. Select the closed visit record in the top pane of the browser.
7. Click ***Visit Merge*** to merge the closed visit record with the open visit record.
8. Click the Save icon.

Merging Two Different Patient Records

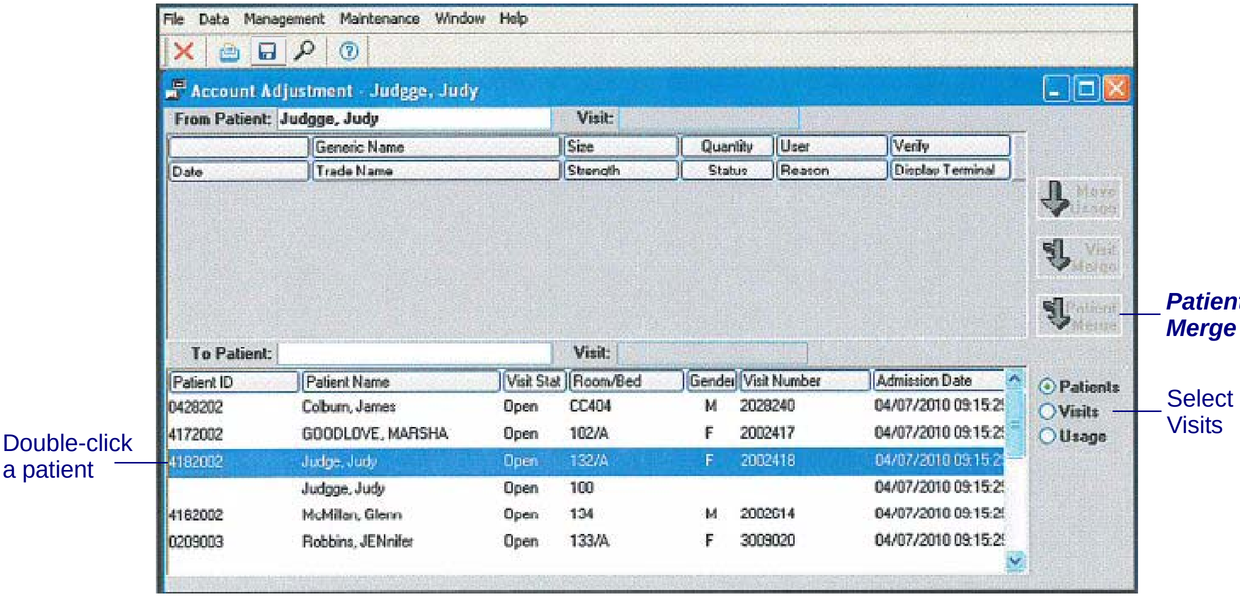
You can merge two records that exist for the same patient into a single record. This may happen if a patient is entered at the DT without a patient ID or if one of the records contains erroneous information (such as an incorrect ID) that prevents the AWS or system interface from recognizing a duplicate record.

Note: If you merge a record for patient “A” into a record for patient “B”, all supply transactions from patient “A” become the property of patient “B” including all open and closed visit records and all MedOrders. The patient “A” record will then be deleted.

Follow the steps below to merge two patient records.

1. Select Patient on the Management list to open the Patient Browser below.
2. Double-click a patient row in the Patient Browser or select a patient row and click ***Details*** to open the Patient Detail window.
3. Click ***Account Adjustment*** to open the Account Adjustment window.

   The window has two panes. The top pane displays any supplies used by the selected patient for that visit - this is the sending account. The bottom pane is a patient browser - this is the receiving account.



4. Double-click on the patient you want to merge the patient with in the bottom pane of the browser.
5. Select the Visits button.
6. Click ***Patient Merge*** to merge the patient in the top pane with the patient in the bottom pane. The patient that was in the top pane no longer displays in the patient browser.
7. Click the Save icon.

Equivalents

When ordered medications are not available at Equivalents provide pharmacy-approved medication substitutions when ordered medications are not available on the DT. Normally, this is caused by out of stock, not enough stock, or not stocked at the station events. Equivalents are used only for MedOrders.

The Equivalence Management Supply list from which you select equivalents is derived from the Supply Browser list. You can choose an equivalent as a direct substitution for the originally-prescribed medication. For example, there may be one 800 mg Tylenol ordered but not available at the DT. You may have the choice of two 400 mg Tylenol substitutes as an equivalent.

ARxIUM implementation personnel will work with your pharmacy to configure your equivalents when installing your system.

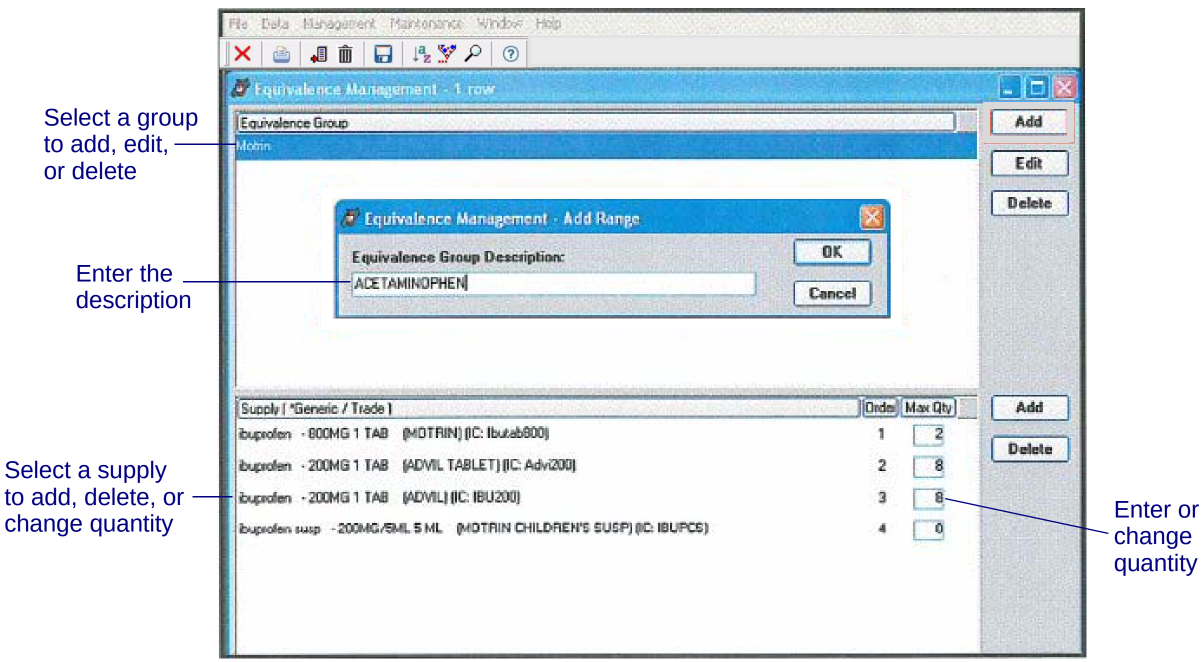
You can add, edit, or delete equivalence groups and equivalents.

Working with Equivalents

You must have the equivalence access right to work with clients. See Adding a User on page 59 for setting rights.

To begin working with equivalents, follow these steps:

1. Select Equivalence on the Management list to open the Equivalence Management window.



2. Select Data on the toolbar.

3. Select Refresh Browser to update data.

Adding an Equivalence Group

Follow the steps below to add a new equivalence group.

1. Select Equivalence on the Management menu to open the Equivalence Management window.
2. Select an equivalence group in the top pane of the Equivalence Management window.
3. Click ***Add*** in the top pane or select the Add icon in the toolbar to open the Equivalence Management - Add Range window.
4. Enter the description (60 characters maximum) of the new equivalence group in the Equivalence Group Description field.
5. Click ***OK***. The Equivalence Management - Add Range window closes.

   The new equivalence group description will appear in the top pane of the Equivalence Management window.

6. Click the Save icon.

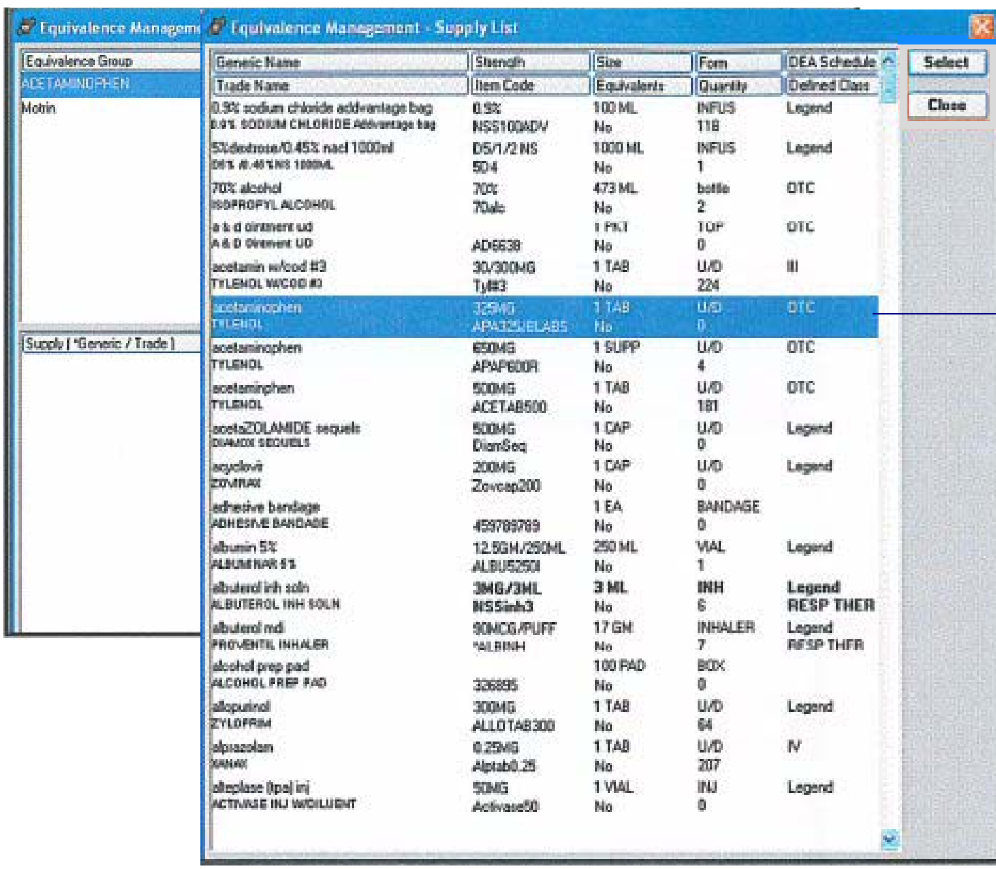
Adding Equivalents to a Group

Follow the steps below to add equivalents to a group.

1. Select Equivalence on the Management list to open the Equivalence Management window.

2. Select an equivalence group in the top pane of the Equivalence Management window.
3. Click ***Add*** in the bottom pane of the window to open the Equivalence Management - Supply List window.

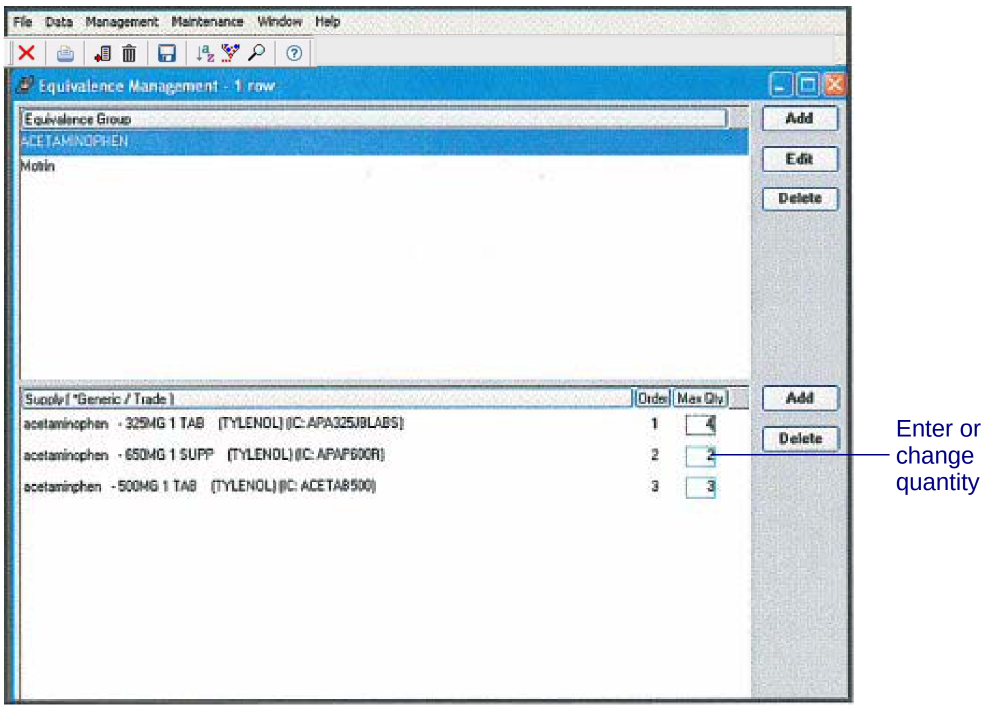
   Refer to the table on page 285 for an explanation of all the Equivalence Management - Supply List fields.



Select a supply

4. Double-click a supply or select it and click ***Select*** to assign it to the group.

5. Click ***Close*** after all the supplies have been assigned. The Equivalence Management - Supply List window will close and the Equivalence Management window will display the added equivalents.



6. Enter the quantity in the Max Qty field(s).

7. Click Save in the toolbar.
You can drag and drop the equivalent supplies to change the sort order, which then affects the order users see on the DT.

Editing an Equivalence Group Description

Follow the steps below to edit an equivalence group description.

1. Select Equivalence on the Management list to open the Equivalence Management window.
2. Select an equivalence group in the top pane of the Equivalence Management window.
3. Click ***Edit*** in the top pane to open the Equivalence Management - Add Range window.
4. Modify the description (60 characters maximum) of the equivalency group in the Equivalence Group Description field.
5. Click ***OK***. The Equivalence Management - Add Range window closes.

   The new equivalence group description will appear in the top pane of the Equivalence Management window.

6. Click the Save icon.

Editing the Maximum Quantity of Equivalents

Follow the steps below to edit the maximum quantity of an equivalent.

1. Select Equivalence on the Management list to open the Equivalence Management window.
2. Select a supply in the bottom pane of the Equivalence Management window.

3. Change the quantity in the Max Qty field.
4. Click the Save icon.

Supply List Field Definitions

Refer to the following table for an explanation of each of the supply detail fields.

Field	Explanation
Generic Name	The general, chemical, or non-brand name for a drug/supply (50 characters maximum)
Trade Name	The manufacturer's proprietary, US trademarked name for a drug/supply. (50 characters maximum)
Strength	The application strength of the drug. (15 characters maximum).
Item Code	A unique identifier assigned to identify a supply. For medications, this should be the formulary number (15 characters maximum)
Size	The per unit amount of a supply, which includes the numerical supply quantity (such as 1 or 250) and a unit description (such as ml or mg)
Equivalents	Equivalent status for medications is displayed here. A status of Yes indicates that the supply has equivalent(s) potentially available at the DT. No indicates it has no equivalent(s)
Form	The form of the substance, such as capsule (20 characters maximum).; derived from the pharmacy management system for MedOrders
Quantity	The supply quantity stocked on the MedSelect Flex system. It cannot be changed at the AWS. It is changed as DT quantities and Centrack quantities change

Field	Explanation
DEA Schedule	This includes the Drug Enforcement Agency defined schedules, which includes Schedule I, II, III, IV, V, and VI. Schedule I drugs are not used in the United States. Schedule VI is not an official schedule in some states, but may be used to secure supplies that do not fall under the official classifications. It also includes legend (drugs requiring a prescription) and OTC (over-the-counter).
Defined Class	The class assigned to the supply by the administrator. The administrator can give permission to restock, dispense, and/or audit this class to individual users and user groups.

Deleting an Equivalence Group

Follow the steps below to delete an equivalence group.

1. Select Equivalence on the Management list to open the Equivalence Management window.
2. Select an equivalence group in the top pane of the Equivalence Management window.
3. Click ***Delete*** in the top pane; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Deleting Equivalents from a Group

Follow the steps below to delete equivalents from a group.

1. Select Equivalence on the Management list to open the Equivalence Management window.
2. Select an equivalence group in the top pane of the Equivalence Management window.
3. Select an equivalent in the bottom pane.
4. Click ***Delete*** in the bottom pane.
5. Click ***Yes*** on the pop-up to delete or click ***No*** to cancel the deletion.
6. Click the Save icon.

Notes:

Supplies

Supplies are all the medications and other items that are dispensed through the MedSelect system.

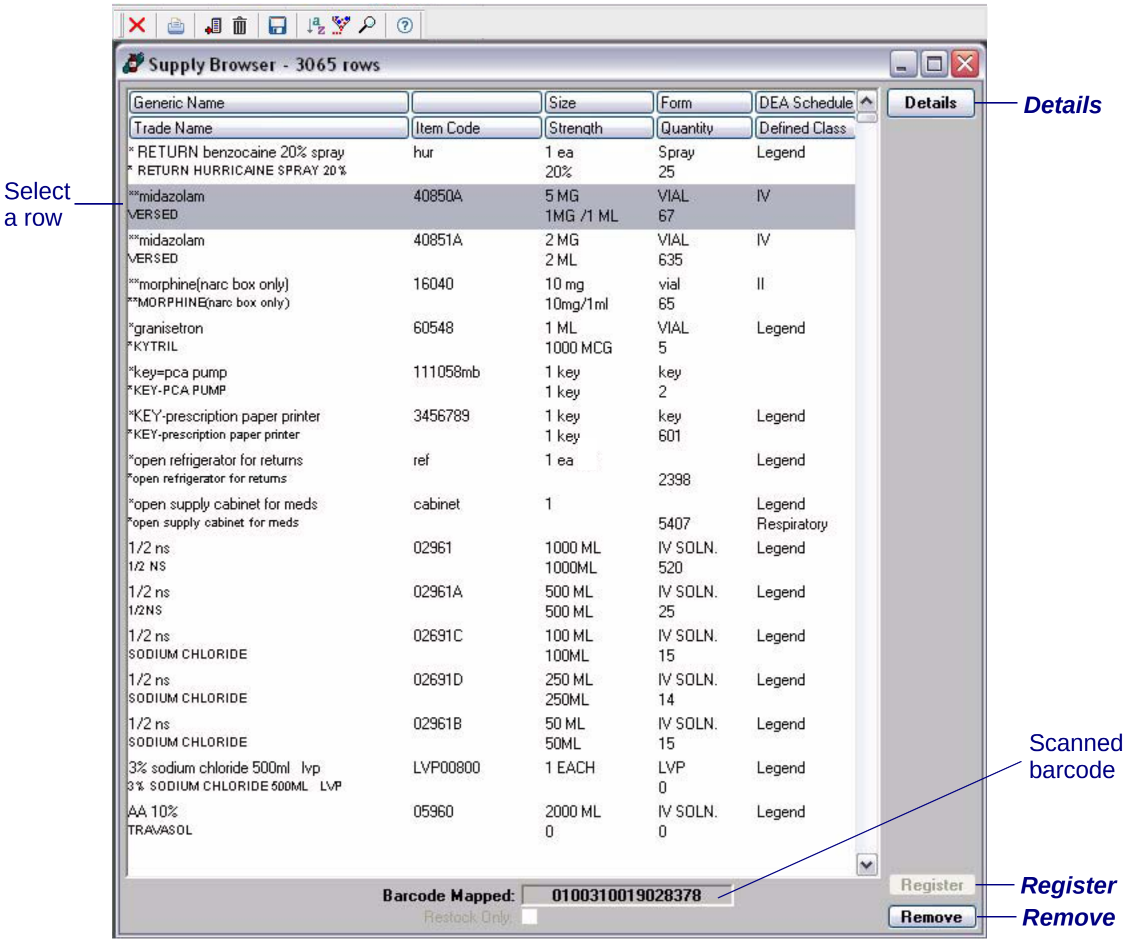
Using the Supply Browser, you can view the details of any supply record listed in the browser and add, edit, or delete supply details.

You must have the inventory access right to use Supply Management. Assign the inventory access right, referring to Adding a User on page 73.

Working with the Supply Browser

To begin working with the Supply Browser, follow these steps:

1. Select Supply on the Management menu to open the Supply Browser. (See the following figure.)
2. Select Data on the toolbar of the AWS main window and select Refresh Browser to update the browser.



Select any column heading to sort the information on this window by that column.

When the browser opens, you can type a supply name to locate supplies.

Registering and Removing Barcodes

A scanner must be set up and tested with the assistance of an ARxIUM specialist at the station prior to registering and removing barcodes. You can view the scanner port and settings by clicking Data on the AWS main window and then clicking Configure Scanner.

The AWS property of SmartStock must be set to “Y” in Client Configuration. Refer to Assigning App Type Properties on page 188.

You can register barcodes to supplies using a handheld scanner. You can also remove supply barcodes. You must have the barcode registration right to do this. Assign the barcode registration right. on the User Detail window. Refer to Adding a User on page 73.

Registering Barcodes

Follow the steps below to register a barcode.

1. Select Supply on the Management menu to open the Supply Browser.
2. Select the supply for which you want to register the barcode.
3. With the supply in hand, scan the barcode, which will display in red in the Barcode Mapped field.
4. To verify, either scan the barcode again or click ***Register***. The barcode will change to black.
5. Click the Save icon.

Deleting Barcodes

You can delete a single barcode or multiple barcodes one at a time if more than one barcode was mapped to a medication. You may delete an incorrect barcode and register a correct one.

Follow the steps below to remove a single barcode.

1. Select Supply on the Management menu to open the Supply Browser.
2. Select a row on the Supply Browser or scan the barcode on the supply container.
3. Click ***Remove***.
4. Click the Save icon.

Follow the steps below to remove multiple barcodes.

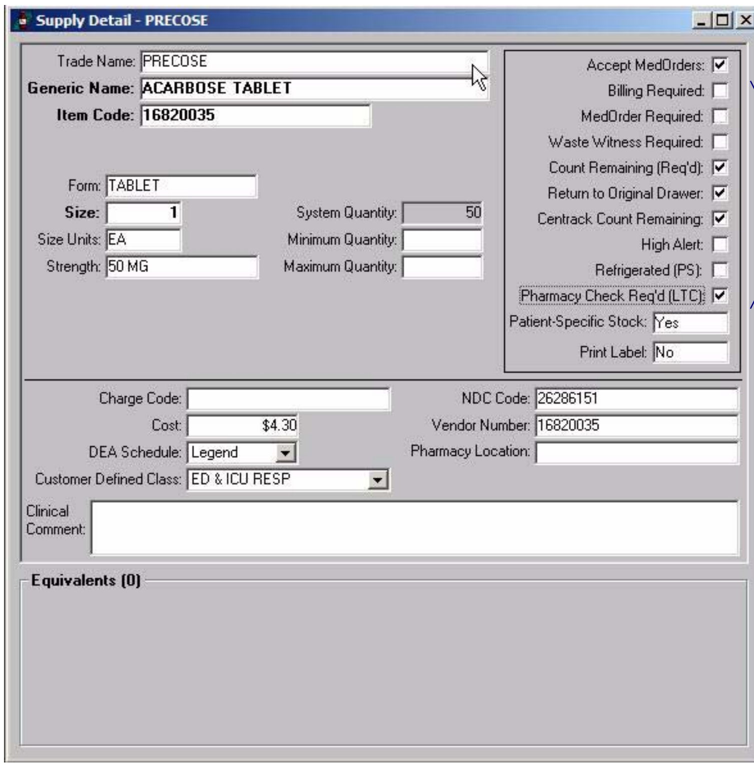
1. Select a row on the Supply Browser or scan the barcode on the supply container.
2. Click Data on the toolbar of the AWS main window.

Note: If you select Delete Barcodes when there is only one assigned, a message that the supply has only 1 registered barcode appears. Click ***OK****.*

3. Select Delete Barcodes; a window appears with all of the barcodes assigned to the supply.
4. Select the barcode you wish to delete.
5. Click ***Delete***, then ***Close***; a confirmation window appears.
6. Click ***Yes*** to confirm the deletion.

Working with Supply Details

Supply details provide all the required information for a medication/supply. Double-click a supply or select a supply on the Supply Browser and click ***Details***. The Supply Detail window appears. You can add, edit, and delete supplies on this window.



Select criteria

Adding a Supply

Follow the steps below to add a supply.

1. Select Supply on the Management menu to open the Supply Browser.
2. Click ***Details*** to open the Supply Detail window.
3. Click Add in the toolbar to open a blank Supply Detail window.
4. Enter data in the fields, drop-down boxes and check the boxes as necessary, referring to the field descriptions in the table on page 295. Use the following criteria:
   - Bold fields require data.
   - The item code must be unique
   - Select the customer defined class from the drop-down box, if required
5. Click Save in the toolbar.

Editing a Supply

Follow the steps below to edit a supply.

1. Select Supply on the Management menu to open the Supply Browser.
2. Double-click a supply row in the Supply Browser or select a supply row and click ***Details*** to open the Supply Detail window.
3. Modify data in the fields, drop-down boxes, and check boxes as necessary, referring to the field descriptions in the table below. Use the following criteria:

- Bold fields require data
- The item code must be unique
- Select the customer defined class from the drop-down box, if required

4. Click the Save icon.

Supply Detail Field Definitions

Refer to the following table for an explanation of each of the Supply Detail fields.

Field	Explanation
Trade Name	The manufacturer's proprietary, U.S. trademarked name for a drug/supply (50 characters maximum).
Generic Name	The general, chemical, or non-brand name for a drug/ supply (50 characters maximum).
Item Code	A unique identifier assigned by the facility to identify a drug/supply (20 characters maximum).
Form	The form is derived from the pharmacy management system, and represents the form of the substance, such as vial or inhaler (20 characters maximum).
Size	The per unit amount of a drug/supply. Always enter a numerical size (such as 1, 20, 400). If you enter a size, you must also enter a size unit. Do not fill in one field and leave the other blank. Both fields may be left blank (8 characters maximum).
Size Units	The measurement used with the drug/supply. Always enter a unit description (such as mg or ml). If you enter a size unit, enter a size. Do not fill in one field and leave the other blank. Both fields may be left blank (8 characters maximum).

Field	Explanation
Strength	The application strength of the drug/supply (15 characters maximum).
System Quantity	The quantity of the drug/supply currently stocked in the MedSelect Flex system. It cannot be changed at the AWS but can be edited at the DT.
Minimum Quantity	The minimum system-wide quantity of a drug/supply that your facility wants to keep stocked in the MedSelect Flex system. The drug/supply should be re-ordered when it reaches the minimum quantity (par quantity).
Maximum Quantity	The maximum system-wide quantity of this drug/supply to keep stocked on the MedSelect Flex system. This prevents over-stocking.
Accept MedOrders	When checked, the MedSelect Flex system can accept this drug/supply in a MedOrder for dispensing. This is a default when adding new items.
Billing Required	When checked, it indicates that all drug/supply dispenses should be sent to the billing interface. This is a default when adding new items.
MedOrder Required	When checked, it indicates the drug/supply must be prescribed in an order before it can be dispensed. It will not appear in the Med/Supply browser (picklist).
Waste Witness Required	When checked, it indicates that a second user must log in to witness the wasting of a drug/supply. A witness must have witness rights. Typically used for controlled substances.
Count Remaining (Req'd)	When checked, it indicates that the user must count remaining drugs/supplies in a position each time a drug/supply is dispensed. A count is not required for a UDM.

Field	Explanation
Return to Original Drawer	When checked, it indicates that the user may return this drug/supply to the position from which it was taken. The Institute for Safe Medication Practices (ISMP) recommends that this feature be used for refrigerated items and items too large for the return drawer.
Centrack Count Remaining	When checked, it indicates that the user must recount the remaining drugs/supplies in Centrack each time that drug/supply is accessed within the pharmacy vault.
High Alert	Indicates a high alert at the DT and may require a witness (set at the position level).
Refrigerated	Check this option when the supply is a patient-specific, refrigerated supply.
Pharmacy Check Required (LTC)	Check this option to use the pharmacy check feature for the supply. When checked, the user is prompted for an approval code. When unchecked, the user is not prompted to request a pharmacy check approval code.

<table>
<tr><th>Field</th><th>Explanation</th></tr>
<tr><td>Patient Specific Stock</td><td>You can specify one of three choices for patient-specific stock. They are:
• Select Prompt when a medication is stocked at a station and the patient has a patient-specific position defined. The nurse will be asked if s/he wants to dispense from the patient-specific drawer.
If No is selected, the drug/supply will be dispensed from the cabinet and the patient will be charged.
If Yes is selected, the patient-specific drawer will open and the nurse can remove the drug/supply against the order but no billing will occur.
The drug/supply will be marked as Taken against a MedOrder with the designation Taken (PS) on the DT Patients Usage window.
• Select Yes when a drug/supply is not stocked at a station and the patient has a patient-specific position. The drug/supply will be dispensed from the patient-specific drawer (this is the default).
• Select No if the drug/supply will never be placed in a patient-specific drawer, for example, large IVs or possibly controlled substances.</td></tr>
<tr><td>Charge Code</td><td>May be used for sending back charges against a specific item code (25 characters maximum). This is typically not used.</td></tr>
<tr><td>Cost</td><td>May be used to indicate average wholesale price (AWP) or actual acquisition cost. This is typically not used.
In order to calculate inventory cost, use the actual acquisition cost.</td></tr>
</table>

Field	Explanation
DEA Schedule	This includes the Drug Enforcement Agency defined schedules, which includes Schedule I, II, III, IV, V, and VI. Schedule I drugs are not used in the United States. Schedule VI is not an official schedule in some states, but may be used to secure supplies that do not fall under the official classifications. It also includes Legend (drugs requiring a prescription) and OTC (over-the-counter). If this field is left blank, it can be accessed by a user with login rights only.
Customer Defined Class	The class assigned to the drug/supply by the administrator. The administrator can give permission to restock, dispense, and/or audit this class to individual users and user groups. Assign users to the CDC prior to assigning the drug/supply to a CDC.
NDC Code	The National Drug Code that specifies this drug/supply (15 characters maximum). You can support one NDC per NDC code. Multiple barcodes can be mapped to the NDC code.
Vendor Number	Use this field to filter a below minimum for the vault that is vendor-specific. (15 characters maximum).
Pharmacy Location	The drug/supply's location within the pharmacy. This could be the pharmacy vault. Centrack can use or maintain this field.
Clinical Comment	A free text area to enter data about a drug/supply (display options can be chosen on the Department Maintenance window).
Equivalents	All medications that are considered equivalents will be displayed here.

Deleting a Supply

Follow the steps below to delete a supply.

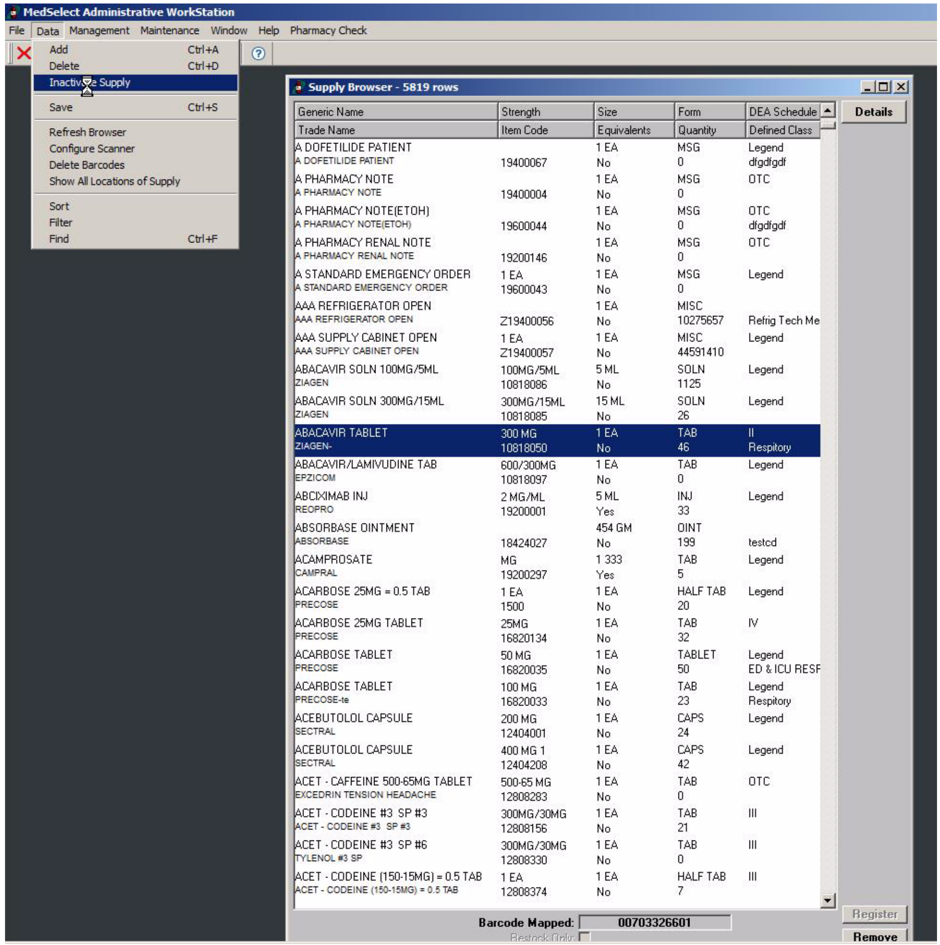
1. Select Supply on the Management menu to open the Supply Browser.
2. Select a row on the Supply Browser.
3. Click Delete in the toolbar; a confirmation window appears.
4. Click ***Yes*** to confirm the deletion.
5. Click the Save icon.

Note: You are not allowed to delete a supply if the supply information is required elsewhere in the MedSelect Flex system or otherwise meets a condition that prevents the deletion. If such a condition exists, a message window notifies you.

Deactivating a Supply

Follow these steps to deactivate a supply.

1. Select Supply on the Management menu to open the Supply Browser.
2. Choose the supply you want to deactivate.
3. On the Data menu, choose Inactivate Supply, as shown in the following figure.



Note: The Inactivate Supply option on the Data menu is only accessible to those users who have the Supply Activation right among their user rights.

4. Confirm the deactivation when the pop-up window appears.

The supply information on the Supply Browser turns red, to indicate it has been deactivated.

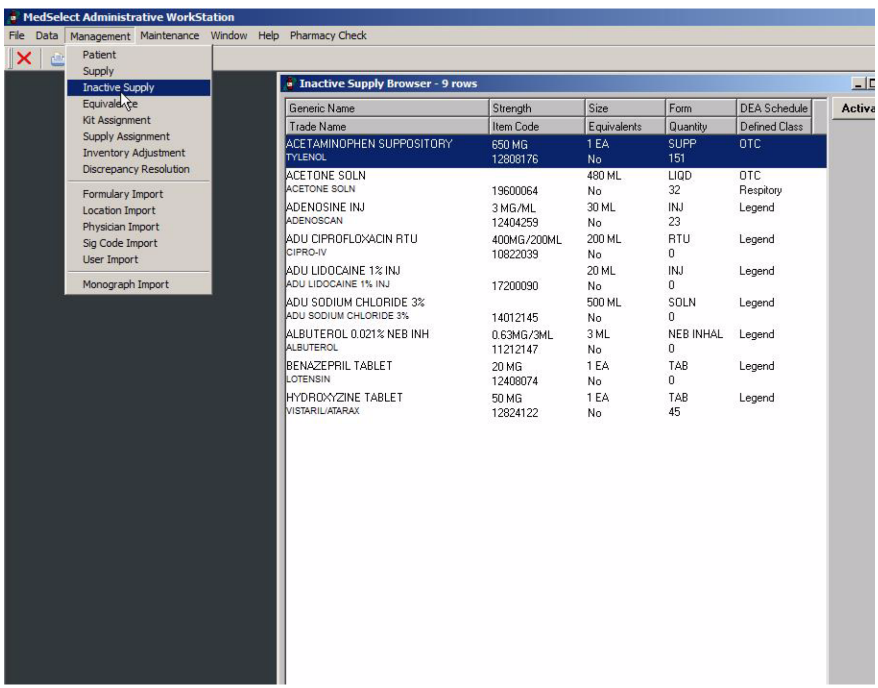
Note: Deactivating a supply will not prevent you from dispensing the supply at other locations.

5. Click the Save icon. The supply moves from the Supply Browser to the Inactive Supply Browser (accessible from the Management menu).

Activating a Deactivated Supply

Follow these steps to activate a deactivated supply.

1. Choose Inactive Supply from the Management menu. The Inactive Supply Browser opens.



2. Choose the supply you want to activate.
3. Click ***Activate***. The supply is now active.

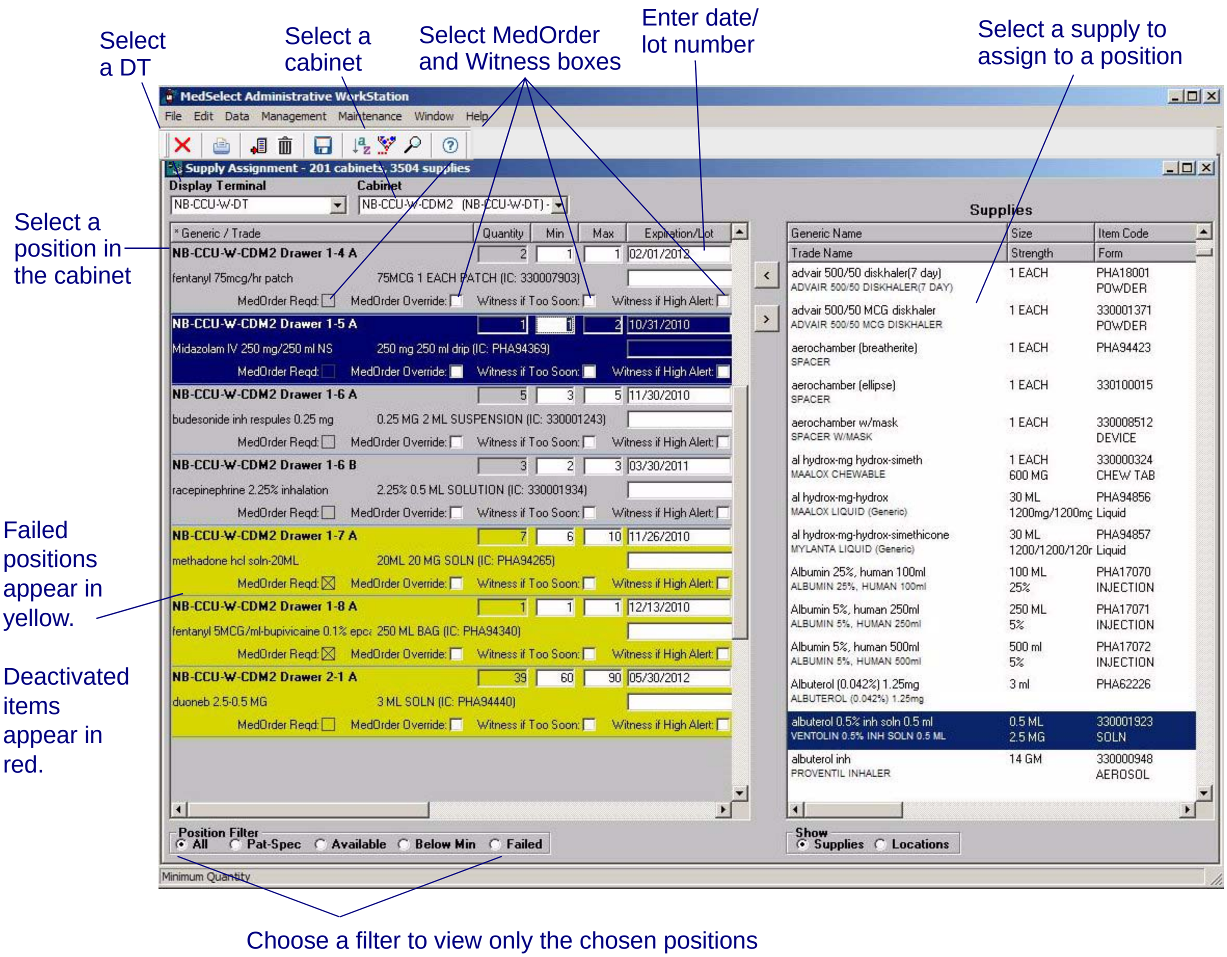
Working with Supply Assignment

You can assign supplies to positions, view the stocked quantities and last audit, set minimum and maximum quantities, and enter the supply expiration date and lot number. You may also indicate MedOrder Required, MedOrder Override, Witness if too Soon, and Witness if High Alert status.

You must have the inventory access right to assign supplies to positions. Refer to Adding a User on page 73.

Choose Supply Assignment on the Management menu to open the Supply Assignment window (see the following figure) and begin working with supply assignments.

The Supply Assignment window has two panes. The left has positions with assigned supplies. The right is a supplies/locations browser. The supplies browser is the default view in the window.


Select a DT
Select a cabinet
Select MedOrder and Witness boxes
Enter date/ lot number
Select a supply to assign to a position
Select a position in the cabinet
Failed positions appear in yellow.
Deactivated items appear in red.
Choose a filter to view only the chosen positions
MedSelect Administrative WorkStation
Supply Assignment - 201 cabinets, 3504 supplies
Display Terminal
Cabinet
Supplies
Position Filter
All
Pat-Spec
Available
Below Min
Failed
Show
Supplies
Locations
Minimum Quantity

Assigning Supplies to Positions

Follow the steps below to assign a supply to a position.

1. Choose Supply Assignment on the Management menu. The Supply Assignment window appears.
2. Select a DT in the Display Terminal drop-down box.
3. Select a cabinet in the Cabinet drop-down box.
4. On the left side of the Supply Assignment window, select a position in the cabinet to which you want to assign a supply.

   You may have to scroll down the list to locate the position you want. Or, you can filter the items you see on the window, referring to step 5 in these instructions.

5. Select the options to filter the data you view on the left side. The options are:
   - All Positions - all supply positions
   - Patient-Spec - only supply positions designated for specific patients
   - Available - positions with no supplies assigned
   - Below Min - positions with supplies under minimum quantity
   - Failed - only failed positions will appear. (You can also view only failed positions by choosing the option from the Data menu at the top of the window.)
6. Select a supply in the right pane to assign to the selected position in the left pane.

You may have to scroll down the list to locate the supply you want.

7. Click the < arrow to assign the supply to the position.

   You can also drag and drop supplies from the right pane to the position in the left pane.

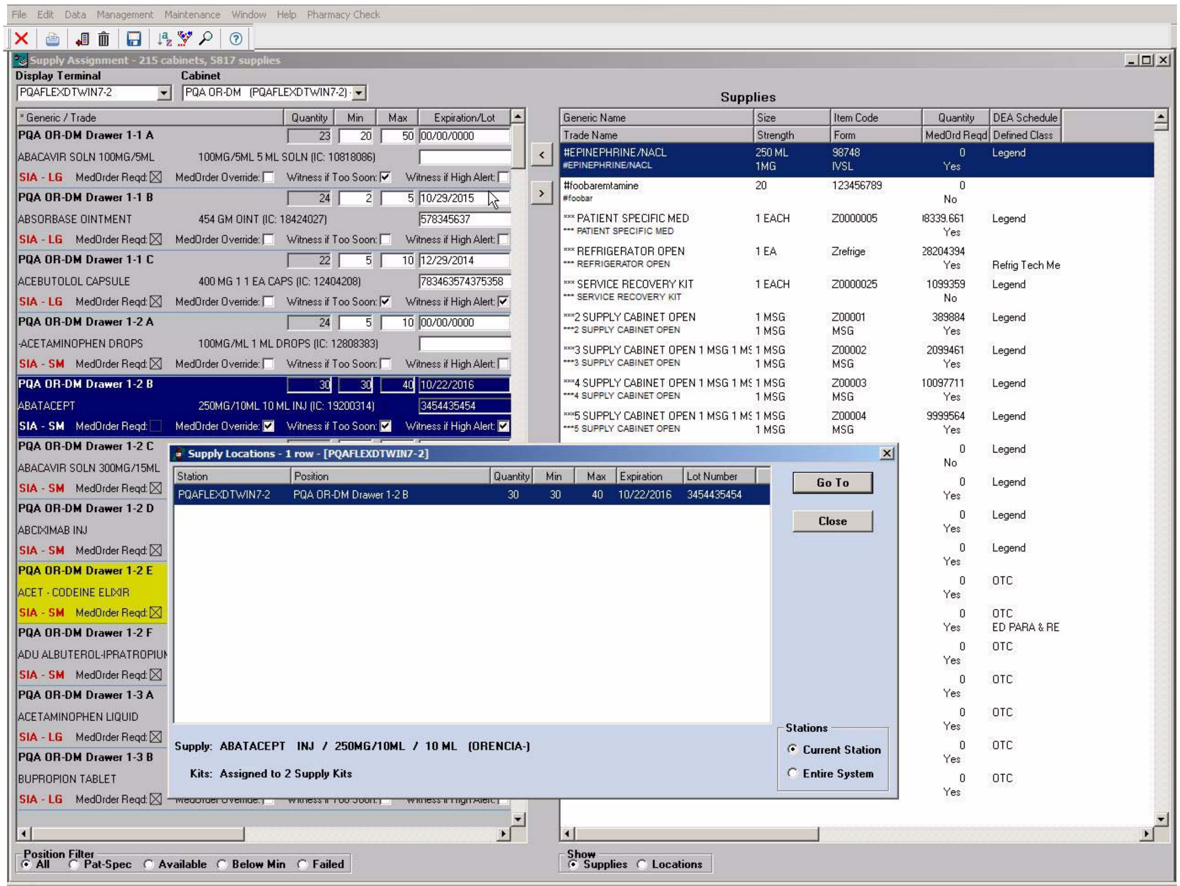
8. Enter the Expiration/Lot in the fields if required.
9. Select the appropriate check boxes. They are:
   - MedOrder Reqd - requires a MedOrder for dispense
   - MedOrder Override - allows a user to view and dispense a supply without a MedOrder on the Med/Supply Browser picklist at the DT (MedOrder system only)
   - Witness if Too Soon - requires a witness if giving a medication before it is due
   - Witness if High Alert - requires a witness for medications with high alert status
10. If desired, right-click on the selected position in the left pane and select from:
    - Enlarge - expands the left pane across the window
    - Details - displays the Supply Detail window
    - Locations - displays all the locations for the supply
    - Positions with Active Orders - indicates all the orders in the position that are currently active.
11. Set the maximum and minimum quantities, referring to Setting Maximum and Minimum Quantities in the following section.

Searching for Supply Locations

There are two methods to search for all the locations that stock a specific supply. The first method uses the Supply Assignment Browser. Follow these steps.

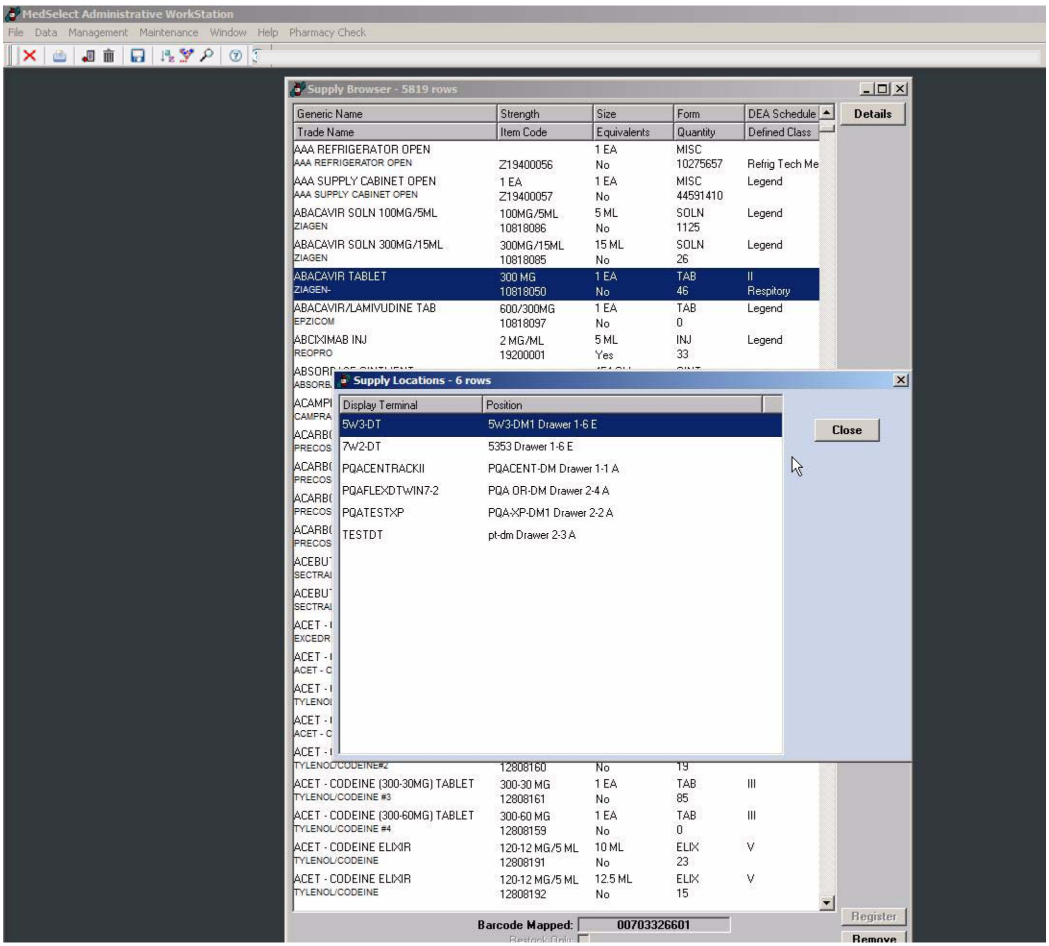
1. Choose a supply on the Supply Assignment Browser.
2. Right-click the supply.
3. Choose Supply Locations from the pop-up window that appears. The Supply Locations window opens. (See the following figure.)

   You can filter the supply locations you see on the Supply Locations window by choosing either Current Station or Entire System.



The second method uses the Supply Browser. Follow these steps.

1. Choose a supply on the Supply Browser.
2. From the Data menu, choose Show All Locations of Supply. The Supply Locations window opens, as shown in the following figure.



Setting Maximum and Minimum Quantities

You must set maximum quantities to ensure you have enough supplies for those you use frequently, and set minimum quantities to ensure that you have adequate supplies kept in stock.

The maximum quantity is the highest quantity of the supply that should be stocked at the position. You may want to set the maximum quantity at the position's holding capacity for frequently-used supplies. Conversely, you may want to set the maximum quantity at less than the holding capacity for supplies that are used less frequently.

The minimum quantity is the lowest quantity of the supply that should be stocked at the position. Positions that fall below minimum are printed on the Below Minimum and Restock Cabinet reports.

If you store the same supply in multiple positions, set the minimum quantity for each position to 1. If you set the minimum quantity to higher than 1, a position that falls below minimum is likely to be restocked before the inventory can move to the next available position containing the same supply. Inventory in the second position may not get used and may expire.

If you set the minimum to 0, the supply position will never be listed on the Below Minimum report, because the inventory cannot fall below 0. This may cause a position to remain empty for some time.

Type the minimum and maximum quantities in the Min and Max text boxes on the Supply Assignment window. After setting maximum and minimum quantities, click Save in the toolbar.

Note: Positions that fall below minimum are automatically printed on the Below Minimum report.

Editing Position Contents

Follow the steps below to edit a position.

1. Choose Supply Assignment on the Management menu to open the Supply Assignment window.
2. Select a DT in the Display Terminal drop-down box.
3. Select a cabinet in the Cabinet drop-down box.
4. Select the position in the cabinet you want to edit. You may have to scroll down the list to locate the position you want. Or, you can choose one of the filter options at the bottom of the window, as described in step 5 on page 305.
5. Change information as needed.
6. When you have finished editing, click Save in the toolbar.

   After you edit the information on the Supply Assignment window, you can assign or unassign supplies to or from the position, if necessary. To do this, refer to Assigning Supplies to Positions on page 305 and Unassigning Supplies from Positions on page 314.

Clearing Failed Positions

In addition to clearing failed positions at the DT, you can clear a failed position at the AWS. There are three methods to clear failed positions.

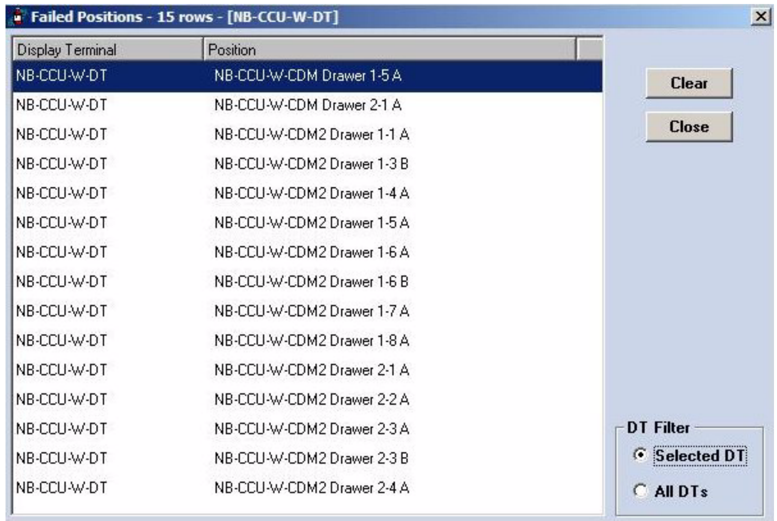
Follow the steps below.

1. At the Supply Assignment window, note any failed positions which appear in yellow.
2. Perform one of the following:
   - Right-click on a yellow position, and choose Clear Failed Flag.
   - Click on a yellow position, then click the Data menu at the top of the window. Then choose Clear Failed Flag.
   - Open the Data menu and choose View Failed Positions. (See the figure on the next page for details.)
3. Confirm that you want to clear the failed position when the confirmation window appears.

Note: Clearing failed flags from AWS records the action to the database for auditing purposes.

Note: You can clear multiple positions as once, and view or clear failed positions at DTs other than the select one. See the following figure.

You will see this window after choosing View Failed Positions on the Data menu. You can clear failed positions for any DT by choosing the All DTs option.



Assigning Supplies to Positions

*Note: You cannot assign a supply to a position if the position already has a supply. If you attempt to do so, a pop-up window alerts you that you cannot overwrite an assigned supply. Click **OK** and unassign the supply, referring to Unassigning Supplies from Positions on page 314.*

Follow the steps below to assign a supply to a position.

1. Choose Supply Assignment on the Management menu to open the Supply Assignment window.
2. Select a position in the cabinet in the left pane.

   You may have to scroll down the list to locate the position you want.

3. Select a supply in the right pane to assign to the selected position in the left pane.

   You may have to scroll down the list to locate the position you want.

4. Click the < arrow to assign the supply to the position.

   You can also drag and drop supplies from the right pane to the position in the left pane.

5. Click the Save icon.

Unassigning Supplies from Positions

You must change the quantity on the Supply Assignment window to 0 (zero) at the DT before unassigning a supply from a position.

You cannot unassign a supply from a failed position.

Follow the steps below to unassign a supply from a position.

Click any column to sort by that column.

1. Choose Supply Assignment on the Management menu to open the Supply Assignment window.
2. Select a position with a supply in the cabinet in the left pane.

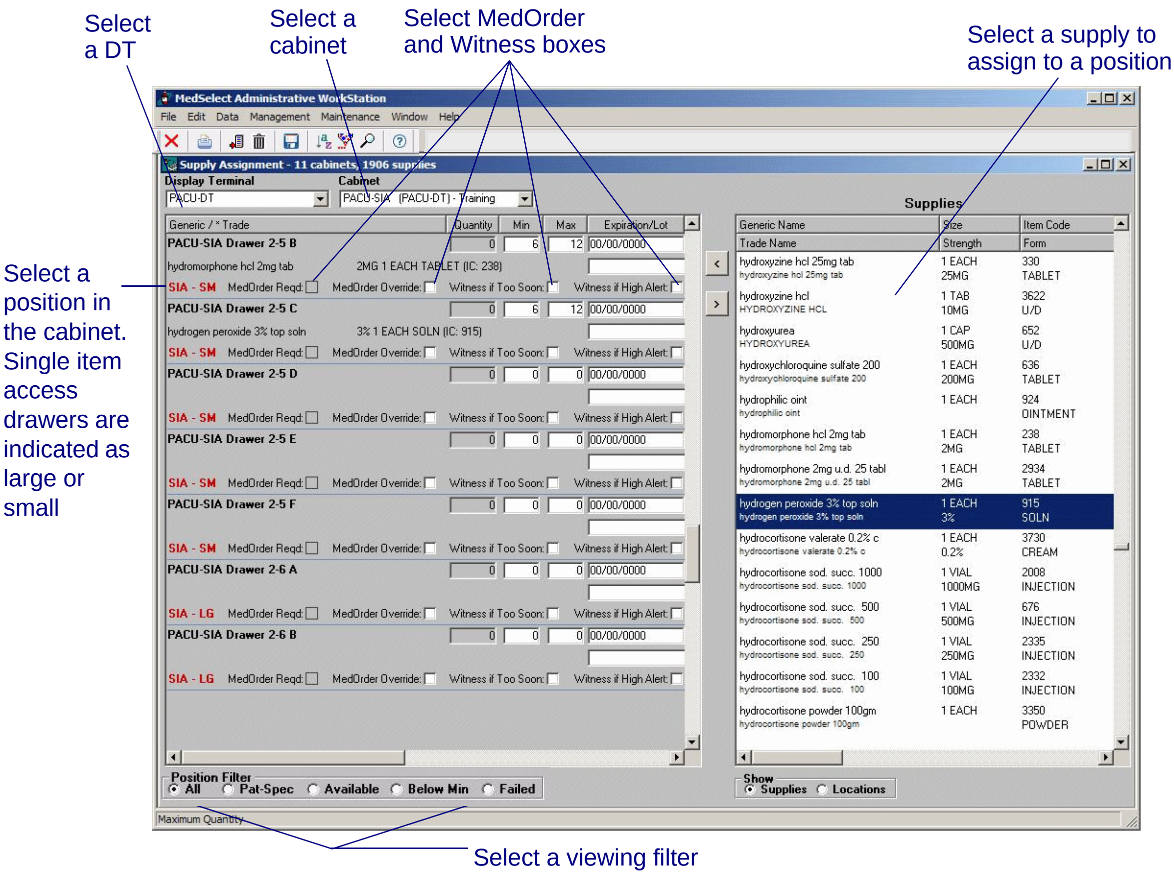
You may have to scroll down the list to locate the position you want.

3. Click the > arrow to unassign the supply from the position.

   You can also drag and drop supplies from position in the left pane to the right pane.

*Note: You must remove supplies from the position when unassigning supplies. When you click the > button or drag and drop, a pop-up window appears with a message stating "When saved, the supply in the position will be unloaded. Continue?" Click **Yes** and remove the supplies from the position.*

4. Click the Save icon.


Select a DT
Select a cabinet
Select MedOrder and Witness boxes
Select a supply to assign to a position
Select a position in the cabinet. Single item access drawers are indicated as large or small
Select a viewing filter
MedSelect Administrative WorkStation
Supply Assignment - 11 cabinets, 1906 supplies
Display Terminal
Cabinet
Supplies
Position Filter
Show
Maximum Quantity

Assigning Patient-Specific Locations to Positions

Follow the steps below to assign a new patient-specific location to a position.

1. Choose Supply Assignment on the Management menu to open the Supply Assignment window.

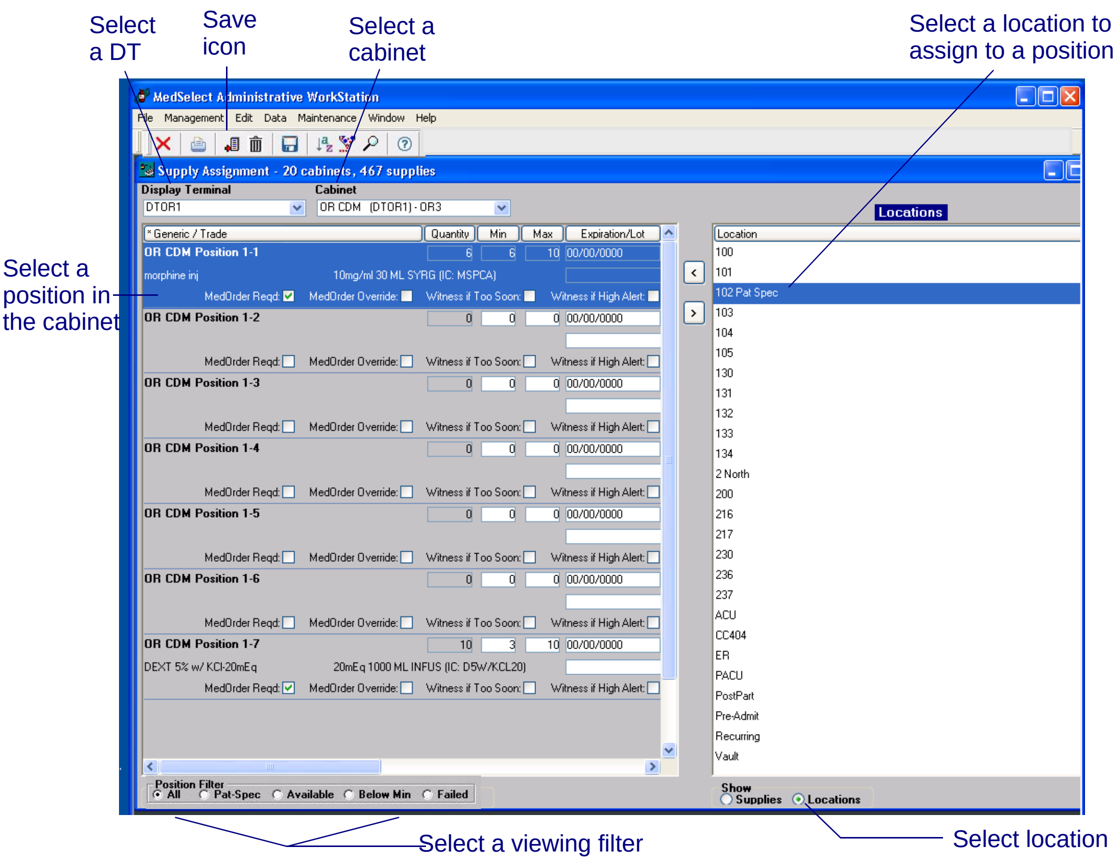
   The window has two panes. The left has positions with assigned supplies. The right is a location browser.
2. Select a DT in the Display Terminal drop-down box.
3. Select a cabinet in the Cabinet drop-down box.
4. On the left side of the Supply Assignment window, select a position in the cabinet to which you want to assign a supply.

   You may have to scroll down the list to locate the position you want. Or, you can filter the items you see on the window, referring to the following step in these instructions
5. Select the options to filter the data on the left side. The options are:
   - All Positions - all supply positions
   - Patient-Spec - only supply positions designated for specific patients
   - Available - positions with no supplies assigned
   - Below Min - positions with supplies under minimum quantity
6. Select the Location option under the right pane.

7. Select the patient-specific location in the right pane to assign it to the selected position in the left pane.You may have to scroll down the list to locate the location you want.

8. Click the < arrow to assign the location to the position. You can also drag and drop locations from the right pane to the position in the left pane.

9. Click the Save icon.



Editing Patient-Specific Locations

Follow the steps below to edit a patient-specific location.

1. Choose the Supply Assignment option on the Management menu to open the Supply Assignment window.
2. Select a DT in the Display Terminal drop-down box.
3. Select a cabinet in the Cabinet drop-down box.
4. Select the position in the cabinet you want to edit, by choosing a position in the left pane.

   You may have to scroll down the list to locate the position you want, or you can filter the view you see by choosing one of the filter options at the bottom Supply Assignment window, on the left side.
5. Change any of the information, as needed.
6. When you have finished, click Save in the toolbar.

   After you edit the information on the Supply Assignment window, you can assign or unassign patient-specific locations to or from the position, if necessary. To do this, refer to Assigning Patient-Specific Locations to Positions on page 317, and Unassigning Patient-Specific Locations from Positions on page 321.

Assigning Patient-Specific Locations to Positions

*Note: You cannot assign a supply to a position if the position already has a supply. If you attempt to do so, a pop-up window alerts you that you cannot overwrite an assigned supply. Click **OK** and unassign the supply, refer to Unassigning Supplies from Positions on page 314 to unassign the supply.*

Follow the steps below to assign a supply to a position.

1. Choose the Supply Assignment option on the Management menu to open the Supply Assignment window.
2. Select a patient-specific location on the Supply Assignment window.
3. Select a position in the cabinet in the left pane.

   You may have to scroll down the list to locate the position you want, or filter your view by selecting one of the filter options at the bottom of the left pane.
4. Select the Location option under the right pane.
5. Select a location in the right pane to assign to the selected position in the left pane.

   You may have to scroll down the list to locate the position you want.
6. Click the < arrow to assign the supply to the position.You can also drag and drop supplies from the right pane to the position in the left pane.
7. Click the Save icon.

Unassigning Patient-Specific Locations from Positions

You must change the quantity on the Supply Assignment window to 0 (zero) at the DT before unassigning a supply from a position.

You cannot unassign a patient-specific location from a failed position.

Follow the steps below to unassign a patient-specific location from a position.

1. Choose the Supply Assignment option on the Management menu to open the Supply Assignment window.
2. Select a position with a patient-specific location in the cabinet in the left pane.

   You may have to scroll down the list to locate the position you want, or choose one of the filter options beneath the left pane.
3. Click the > arrow to unassign the patient-specific location from the position.

   You can also drag and drop supplies from position in the left pane to the right pane.

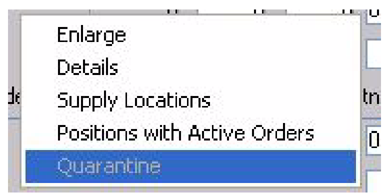
Note: You must remove supplies from the patient-specific position when unassigning patient-specific positions.

4. Click the Save icon.

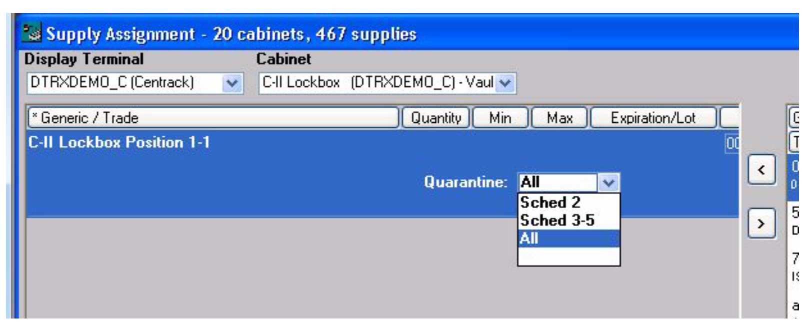
Creating a Quarantine Position in Centrack

A Centrack cabinet must have at least one quarantine position. You can set up one or two quarantine positions to use for items you want to quarantine. Follow the steps below to set up a quarantine position.

1. Choose Supply Assignment on the Management menu. The Supply Assignment window appears.
2. Choose the Centrack station from the drop-down list of Display Terminals.
3. Choose a cabinet from the drop-down list.
4. Right-click the position you want to use for a quarantine position. A menu like that shown here appears.



5. Choose Quarantine. The system indicates the position as a quarantine position, as shown below.



6. Choose an item from the drop-down list to indicate the type of items that will be quarantined in the position.
    - Choose All if this is the only quarantine position.
    - Choose Schedule 2 to quarantine Schedule 2 items in this position. You must then set up a second quarantine position for Schedule 3-5 items, if you haven’t already done so.
    - Choose Schedule 3-5 to quarantine Schedule 3-5 items. You must then set up a second quarantine position for Schedule 2 items, if you haven’t already done so.

Notes:

Formulary

A formulary is a list of generic and brand name drugs that are preferred by your facility/health system.

When you initially set up your MedSelect system, you must import formulary data into the MedSelect database. You can import formulary data from your own database, or you can import formulary data from another facility (for example an affiliate), if the other facility exports the formulary data for you. The formulary data includes a unique item code and supply generic name.

A benefit to importing formulary data is the reduction or elimination of manual data entry.

Note: Your site determines the order for the formulary data and downloads the data into the MedSelect system during setup. ARxIUM recommends that the ARxIUM implementation team assist the site in this process during setup or when the data requires modification.

Data Requirements

Formulary data must meet these requirements before being imported:

- Data must exist in a flat file (text) format.
- The flat file must be tab delimited.
- The flat file format must be as shown in the following table
- The flat file must have, at minimum, the required fields listed in the following table. Other fields are optional, and all fields must not exceed the length specified in the following table.
- The item code must be unique. The system can update existing records with new information and add new records to the database.
- Any supply data that includes a supply size entry should include supply size units, and vice-versa. Do not include one field and leave the other blank. Both fields may be clear.
- When no supply trade name is provided, the supply trade name equals the supply generic name.
- Assign these default values to the following fields when no value is contained in the imported formulary (Y = Yes, N = No, A = Active, I = Inactive):
  - Witness Required Flag = N
  - MedOrder Required Flag = N
  - Return to Original Drawer = N
  - Centrack Count Remaining = N

- Accept MedOrders = A
- Count Remaining Flag = N
- Billing Required = Y
- Prompt MedOrder Patient Specific = blank

Field Name	Type	Length
Item Code (required)	Char	15
Vendor Number	Char	15
Supply Trade Name	Char	50
Supply Generic Name (required)	Char	50
Supply Form	Char	20
Manufacturer Part Number	Char	15
Supply Minimum Quantity	Number	126
Supply Maximum Quantity	Number	126
Supply Size	Char	8
Supply Size Units	Char	8
Supply Strength	Char	15
Supply Cost	Number	126
NDC Code	Char	15
DEA Schedule	Number: 1-6 corresponds to DEA schedules, 37 = OTC, 38 = Legend	N/A
Witness Required Flag	Char (Y, N)	1
MedOrder Required Flag	Char (Y, N)	1
Accept MedOrders	Char (A, I)	1
Count Remaining Flag	Char (Y, N)	1
Pharmacy Location	Char	25
Supply Charge Code	Char	25
Return to Original Drawer	Char (Y, N)	1
Billing Required	Char (Y, N)	1
Customer Defined Class	Char	15
Centrack Count Remaining	Char (Y, N)	1
Prompt MedOrder Patient-Specific	Char (Y, X, blank)	1
Clinical Comment	Char	500
High Alert Flag	Char (Y, N)	1

Refer to the table on page 328 for an explanation of the field definitions.

Formulary Field Definitions

Refer to the following table for an explanation of each of the formulary fields.

Field	Explanation
Item Code	A unique identifier assigned by the facility to identify a drug/supply (20 characters maximum)
Vendor Number	A number assigned by the vendor to identify its product. Alternatively, you may use this field to specify a number that identifies the vendor to your facility. (15 characters maximum).
Supply Trade Name	The manufacturer's proprietary, U.S. trademarked name for a drug/supply (50 characters maximum)
Supply Generic Name	The general, chemical, or non-brand name for a drug/ supply (50 characters maximum)
Supply Form	The form of the substance, such as vial or inhaler (20 characters maximum). Derived from the pharmacy management system for display in MedOrders.
Manufacturer Part Number	The manufacturer’s own part number, which it assigned to the supply (15 characters maximum)
Supply Minimum Quantity	The minimum system-wide quantity of a drug/supply that your facility wants to keep stocked in the MedSelect system. The drug/supply should be re-ordered when it reaches the minimum quantity (par quantity)
Supply Maximum Quantity	The maximum system-wide quantity of this drug/supply to keep stocked on the MedSelect system. This prevents over-stocking.
Supply Size	The per unit amount of a drug/supply. Always enter a numerical size (such as 1, 20, 400). If you enter a size, you must also enter a size unit. Do not fill in one field and leave the other blank. Both fields may be left blank (8 characters maximum).

Field	Explanation
Supply Size Units	The measurement used with the drug/supply. Always enter a unit description (such as mg or ml). If you enter a size unit, enter a size. Do not fill in one field and leave the other blank. Both fields may be left blank (8 characters maximum).
Supply Strength	The application strength of the drug/supply (15 characters maximum)
Supply Cost	May be used to indicate average wholesale price (AWP) or actual acquisition cost. This is typically not used. In order to calculate inventory cost, use the actual acquisition cost.
NDC Code	The National Drug Code that specifies this drug/supply (15 characters maximum) • You can support one NDC per NDC code • Multiple barcodes can be mapped to the NDC code
DEA Schedule	This includes the Drug Enforcement Agency defined schedules, which include Schedule I, II, III, IV, V, and VI. Schedule I drugs are not used in the United States. Schedule VI is not an official schedule in some states, but may be used to secure supplies that do not fall under the official classifications. It also includes legend (drugs requiring a prescription) and OTC (over-the-counter). If this field is left blank, it can be accessed by a user with login rights only.
Witness Required Flag	Indicates that a second user must log in to witness the wasting of a drug/supply. A witness must have witness rights. Typically used for controlled substances.
MedOrder Required Flag	Indicates the drug/supply must be prescribed in an order before it can be dispensed. It will not appear in the Med/ Supply browser (picklist).

Field	Explanation
Accept MedOrders	Indicates the MedSelect system can accept this drug/ supply in a MedOrder for dispensing. This is a default when adding new items.
Count Remaining Flag	Indicates that the user must count remaining drugs/ supplies in a position each time a drug/supply is dispensed. A count is not required for a UDM.
Pharmacy Location	Indicates the drug/supply's location within the pharmacy.This could be the pharmacy vault. Centrack can use or maintain this field (25 characters maximum).
Supply Charge Code	May be used for sending back charges against a specific item code (25 characters maximum). This is typically not used.
Return to Original Drawer	Indicates that the user may return this drug/supply to the position from which it was taken. The Institute for Safe Medication Practices (ISMP) recommends that this feature be used for refrigerated items and items too large for the return drawer.
Billing Required	Indicates that all drug/supply dispenses should be sent to the billing interface. This is a default when adding new items.
Customer Defined Class	Indicates the class assigned to the drug/supply by the administrator. The administrator can give permission to restock, dispense, and/or audit this class to individual users and user groups. Assign users to the CDC prior to assigning the drug/supply to the CDC (15 characters maximum).
Centrack Count Remaining	Indicates that the user must recount the remaining drugs/ supplies in Centrack each time that drug/supply is accessed within the pharmacy vault.

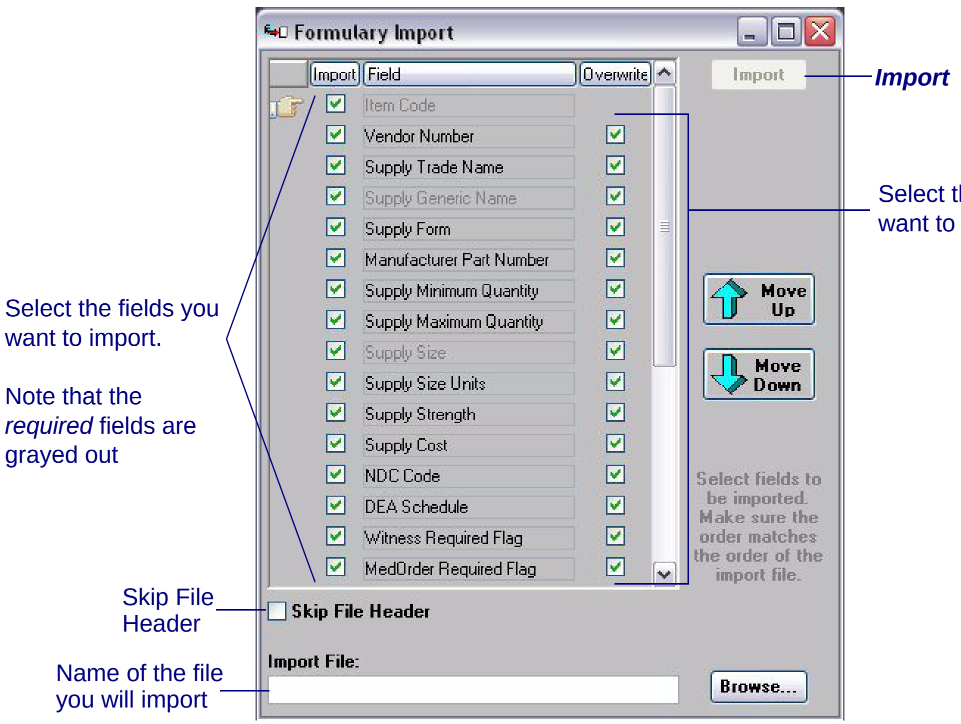
Field	Explanation
Prompt MedOrder Patient-Specific	You can specify one of three choices for patient-specific stock. They are: • Y = When a supply is in floor stock and the patient has a patient-specific position, it prompts the user for dis-pense. • X = The supply will never be placed in a patient-specific position. • Blank = When the supply is in floor stock and the patient has a patient-specific position, dispense from the floor stock.
Clinical Comment	Provides a free text area to enter data about a drug/ supply (500 characters maximum). Display options can be chosen on the Department Maintenance window.
High Alert Flag	Indicates a high alert at the DT and may require a witness (set at the position level)
Refrigerated (patient specific)	Allows patient-specific orders to open the refrigerator.
Pharmacy Check Required	Mark a supply as Pharmacy Check to require a code when dispensing a medication during override. This setting is typically used in long-term care.
Print Label	Indicates whether a label should be printed for the item at the DT during dispense. Y = print label; P = prompt before printing a label; blank = do not print a label.

Importing Formularies

After your data meets all the requirements described in the Data Requirements section, follow the steps below to import the formulary.

1. Select Formulary Import on the Management

menu to open the Formulary Import window. (See the following figure.)



2. Turn off any fields that are not part of the data by removing the check in the Import box to the left of the field name.

Note: No new records will be added if a non-required field is cleared. Instead, only existing records will be updated. Required fields (grayed out) cannot be cleared - a prompt will alert you if you attempt to do so.

3. Arrange the order of the fields to match the order

of the formulary import file. Select a field to move it up or down. Then click ***Move Up*** or ***Move Down***, or drag and drop the field to a new location in the list.

4. Check the Overwrite box to the right of any field you want to overwrite with imported values. Clear the box to preserve the existing value in the database.
5. Click ***Browse*** to locate and select the file you want to import. The file name will display in the Import File text box.
6. Select the Skip File Header box to ignore any header information in the file.
7. Click ***Import*** to import data into the database.

   A progress window displays to show the status of the import. When finished, the number of successful and failed imports displays. For failed imports, you can either continue or stop importing.
8. Select Data on the toolbar of the AWS main window, then select Save Column Format to save the format you used (that is, the order of fields).

   You can also save when you close the window. A prompt will ask if you want to save the format you used (that is, the order of fields). Choose Yes to save this format. Or choose No, to open the list in its default format the next time you use the import function.

Notes:

Discrepancies

Count discrepancies occur at an inventory position when there is a difference between the system quantity (calculated automatically) and the quantity reported by a user.

You must have the discrepancy resolution right to resolve discrepancies. Refer to Adding a User on page 73.

You can resolve discrepancies in either of the two ways described below.

1. The DT user must immediately correct a count discrepancy in a device at the associated DT. The correction is recorded as a resolved event. For a brief description of how to resolve a discrepancy at the DT, refer to Types of Discrepancies on page 336.
2. An administrator resolves a discrepancy by indicating how or why it occurred. This resolution may be performed at the DT or in the AWS. Resolution at the AWS means the discrepancy has been marked as resolved and a

description of the reason for the problem is recorded. Refer to Resolving Discrepancies on page 340 to resolve a discrepancy at the AWS.

Types of Discrepancies

There are four types of discrepancies. Refer to the following discrepancy descriptions:

1. After a dispense, a discrepancy occurs if your count does not agree with the system's count. When a supply is flagged as a count remaining, you are required to count the remaining contents of the position and enter the total at the DT any time you dispense a supply from any device except for a UDM. When a witness is required, the witness must have audit witness rights.

   If the counts differ and the DT has a printer, the discrepancy appears on the printed receipt. You can also view discrepancy events on the Discrepancy Resolution window. A resolved event is generated when the user corrects the discrepancy. The system quantity is updated to match your count.

   An exception to the resolution above occurs when you miscount the items in a drawer and then the next user counts correctly (either during another dispense or when restocking). In this case, the system recognizes your error, and automatically resolves the discrepancy. For example; if there are 10 items in a drawer, but you count and report 9, the system indicates a discrepancy. However, if the next user dispenses 1 item from the drawer and then correctly reports

9 remaining, the system recognizes that you miscounted, and the discrepancy is resolved. “Automatically resolved by the DT” appears in the Resolution Description field of the Discrepancy Resolution window.

2. A discrepancy may be discovered when you restock supplies. You can resolve this by touching ***Discrepancy*** at the DT while viewing the discrepant position's Stock Amount window. You are then prompted to enter the actual quantity in the position prior to restocking it.

   The event that is generated when you correct the discrepancy can be viewed on the Discrepancy Resolution window, and a new resolved event is generated based on the correction. The position quantity is updated to match your count, and the system count is updated.

3. A discrepancy occurs if a DT user does not receive the requested quantity of a supply during a dispense. If too many or too few of the requested quantity are dispensed, you can resolve this by touching the corresponding ***Too Many*** or ***Too Few*** button on the Dispense Verification window at the DT. You are then prompted to enter the quantity that was dispensed.

   You can view the event that occurred at the time of the discrepancy on the Discrepancy Resolution window. A resolved event is generated based on your correction. The quantity is updated to match your count, and the system count is updated. If the incorrect quantity was dispensed from a UDM, the position will be failed and must be corrected at the DT.

4. A discrepancy occurs if the quantity of a supply you find in the retrieve drawer does not match the system's quantity. The system displays the quantity on the Retrieve Inventory window at the DT. If a discrepancy exists, you can resolve it by selecting the discrepant supply, touching ***Adjustment***, and entering the quantity you found in the drawer.

   Remove all supplies from the retrieve drawer. The system assumes all supplies are removed and the supply quantity no longer displays on the Retrieve Inventory window.

   When a discrepancy is corrected, you can view the event on the Discrepancy Resolution window. A resolved event is generated from your correction. The system quantity does not change.

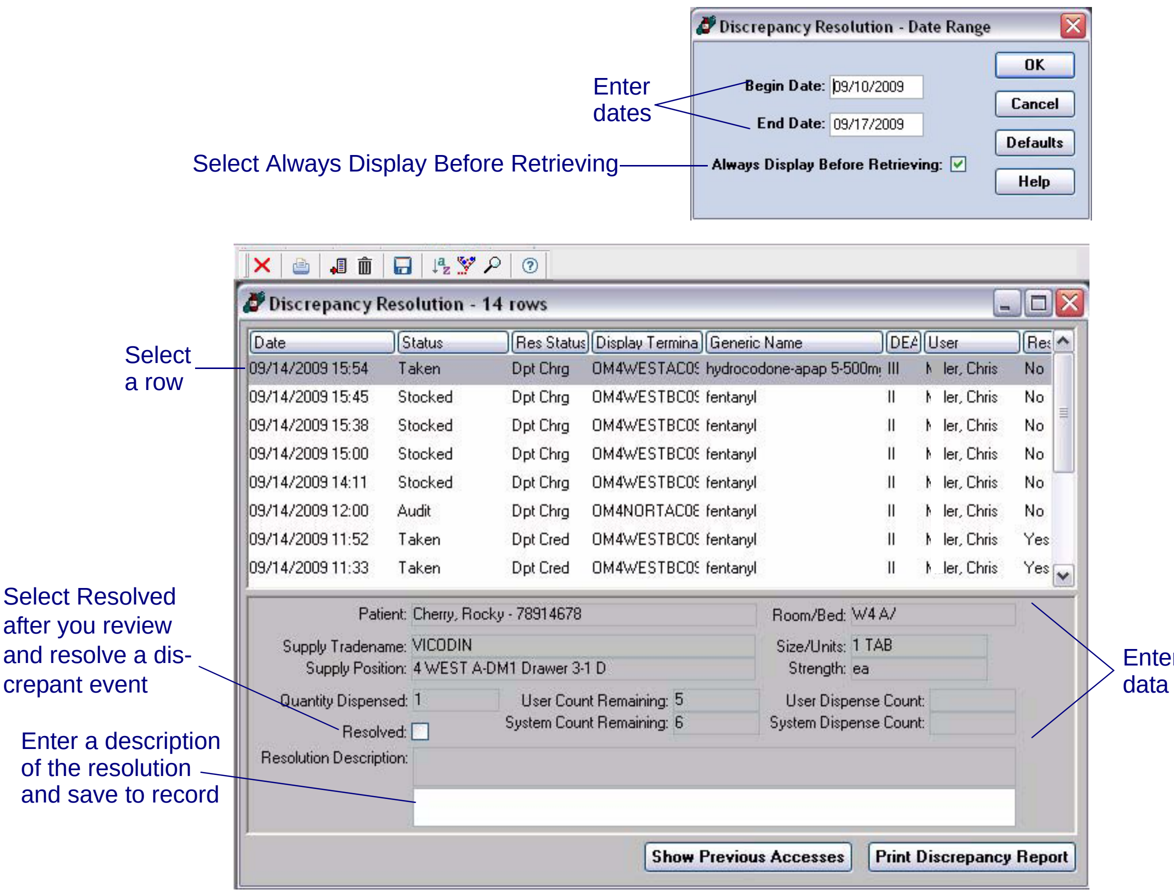
Discrepancy Resolution

You can view, edit, and resolve discrepancies on the Discrepancy Resolution window. You can also view detailed data related to the selected discrepant event. You can print all unresolved discrepancies on the Discrepancy report.

Once an event is marked as resolved at the AWS, it no longer displays on the Discrepancy report, but it may still be printed from the Discrepancy Resolution window.

Begin working with the Discrepancy Resolution window by selecting Discrepancy Resolution on the Management list. The Discrepancy Resolution window opens. (See the figure that follows.) The window displays two panes; the top lists discrepant counts reported at the DT, and the bottom shows discrepant event detail with discrepancy information.

A pop-up window appears with beginning and ending dates that specify the period during which the discrepant events are retrieved. Click ***OK*** to close the pop-up window with the date parameters intact.



Viewing and Editing Discrepancies

Follow the steps below to view and edit a discrepancy.

1. Select Discrepancy Resolution on the Management list. The Discrepancy Resolution window opens.
1. Select a row in the top pane of the Discrepancy Resolution window to display details in the bottom.
2. Modify or add data in the fields as necessary, referring to the field descriptions in the table on page 341.
3. Click the Save icon.

Resolving Discrepancies

Follow the steps below to resolve a discrepancy at the AWS.

1. Select Discrepancy Resolution on the Management list. The Discrepancy Resolution window opens.
2. Enter any information you want into the description box to describe a discrepancy, such as why there was a discrepancy. When a record is saved, the user name (signature) is appended. If a description is provided, it cannot be overwritten, but it may be appended.
3. Check the Resolved check box to indicate the discrepant event has been reviewed and resolved. When checked, the event no longer appears on the Discrepancy report, and is not listed in the

Discrepancy Resolution window on the DT. The event continues to be shown on the Discrepancy Resolution window as resolved.

4. Click the Save icon.

Discrepancy Resolution Field Definitions

Refer to the following table for an explanation of each of the Discrepancy Resolution fields.

Field	Explanation
Date	The date and time of a reported discrepancy
Status	The type of event that was discrepant, such as Taken, Returned, Retrieve
Res Status	The status of the event that the system generated to resolve the inventory: • Dpt Chrg - applies an additional charge to a department to make up for a discrepancy in which the system count is lower than the user corrected count, or . . . • Dpt Cred - credits a department to make up for a discrepancy in which the system count is below the user corrected count, or . . . • Pat Cred - credits a patient account to make up for a discrepancy in which the system charged the patient for a supply not administered to that patient
Display Terminal	The DT where the discrepancy occurred
Generic Name	The generic name of the supply that is discrepant
DEA	The Drug Enforcement Agency-defined schedule for a drug
User	The user who created a discrepant event

Field	Explanation
Res	Indicates whether or not the discrepancy has been resolved (Yes/No)
Patient	The patient for whom the supply was dispensed
Supply Trade Name	A manufacturer's brand name for the supply that was discrepant
Supply Position	The position where the discrepancy occurred
Room/Bed	The room and bed assigned to a patient
Size/Units	The size and unit of measure of the discrepant supply
Strength	The application strength of the discrepant supply
Quantity Dispensed	The number of supply items recorded with a discrepant event
User Count Remaining	When dispensing a supply, a user may be required to report the remaining supplies in a position. The user count remaining is the quantity reported by the user.
System Count Remaining	When dispensing a supply, a user may be required to report the remaining supplies in a position. The system count remaining is the quantity that should be in the position as calculated by the system.
User Dispense Count	When a user does not receive the amount of a supply that was requested during a dispense, the user reports a discrepancy. The user dispense count is the actual quantity of the supplies received as reported by the user.
System Dispense Count	When a user does not receive the amount of a supply that was requested during a dispense, the user reports a discrepancy. The system dispense count is the quantity of supplies that should have been dispensed based on the user's original request.

Field	Explanation
Resolved	If checked, indicates that the user understands why a discrepancy occurred and that it has been resolved.
Resolution Description	A textual description the user enters to explain why a discrepancy occurred, how it was resolved, etc. (1000 characters maximum). The name of the user who logged in to the AWS is appended to the description when it is saved.

Setting the Date Range for Discrepancies

You can set the date range for discrepancies you want to view on the Discrepancy Resolution window. Follow the steps below to set the date range.

1. Select Discrepancy Resolution on the Management list. The Discrepancy Resolution window opens.
2. Select Data on the toolbar of the AWS main window.
3. Select Set Date Range to open the Date Range pop-up window.
4. Enter the dates.
5. Check Always Display Before Retrieving to be prompted to set a date range every time the Discrepancy Resolution window opens.
6. Click ***Defaults*** to automatically set dates so the begin date is determined by the Report Criteria setting in the Facility Maintenance window. The end date is current.

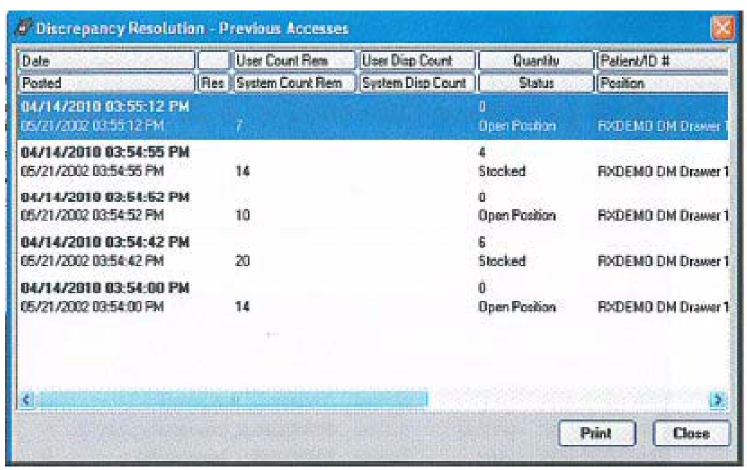
Viewing Previous Accesses

Follow the steps below if you want to view a list of those who previously accessed a location, in order to help resolve a discrepancy.

Note: The Posted column indicates the date the event was added to the database. The remaining columns are the same as those in the Discrepancy resolution window.

1. Select Discrepancy Resolution on the Management list. The Discrepancy Resolution window opens.
2. Double-click or select a row in the top pane of the Discrepancy Resolution window and click ***Show Previous Accesses*** or select Data on the toolbar of the AWS main window.

   A window similar to the one below opens with a record of previous users that dispensed from the position.

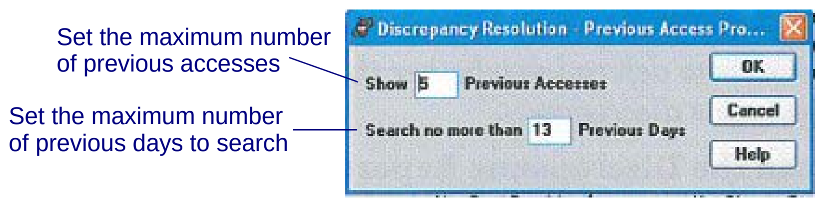


3. Click ***Print*** to print a list or ***Close*** to close the window.

Setting the Number of Previous Accesses

You can set the number of previous accesses you want to see on the Discrepancy Resolution window. Follow the steps below to set the number of previous accesses.

1. Select Data on the toolbar of the AWS main window.
2. Select Set Number of Previous Accesses to open the Previous Accesses window shown below.



3. Enter the maximum number of accesses to view.
4. Enter the maximum number of days to limit the search.
5. Click ***OK*** to close the window.

   The system stops searching for previous accesses when it has found the number of accesses or the number of days, whichever comes first.

Note: The previous setting is retained by the system. You do not need to set this each time you want to view previous accesses unless you want to change the number.

Discrepancy Reports

You can print discrepancy information reports to show an audit trail of discrepancies and previous accesses that occur for each supply position. This report includes the list of users who have most recently accessed a supply position that was found to be discrepant.

Whenever there is a quantity discrepancy in your system, use this report to contact each user to determine if they can offer information that helps resolve the discrepancy.

Note: Before you print a discrepancy report, be sure to set the printer to landscape mode.

Determining Causes of Discrepancies by Report

Review discrepancy reports to determine the cause(s) of discrepancies. Follow these guidelines.

1. The discrepancy report lists each outstanding discrepancy, and for each, it shows a list of individuals who previously accessed the drawer. The number of days of previous accesses shown can be set when you print the report.
2. If a discrepancy occurs in a drawer that has more than one compartment, then the list of previous accesses includes all accesses to that drawer, not just the compartment that has the discrepancy. If there are several accesses, each may or may not be for a different supply in a different compartment. When a discrepancy is in a retrieve drawer, the report shows previous accesses to the retrieve drawer only.
3. For each access to a drawer, the report shows the following two counts:

- The User Count is the quantity the user counted before the drawer was shut
- The System Count is the quantity that the system calculated for the supply based on dispensing and restocking

When the user count and system count numbers differ, there is a discrepancy.

4. When a drawer has multiple compartments, the User Count and System Count may not appear to be decrementing in sequence from one access to the next. This is because each user may be accessing a different compartment, and the supply quantity may be different for each compartment.

   Remember that the previous accesses are shown for the entire drawer, not just the compartment where the discrepancy occurred. For example, one access may show a system count of 10, while the next shows a system count of 15. This indicates that the users probably accessed different compartments.

5. For each access to a UDM, the report shows the following two counts:
   - The User Dispense Count is the quantity that the user has reported as being dispensed
   - The System Dispense Count is the quantity that the system should have dispensed, which is the quantity that was requested by the user

   When the User Dispense Count and the System Dispense Count numbers differ, there is a discrepancy.

Printing a General Discrepancy Report

Perform the step below to print a general discrepancy report.

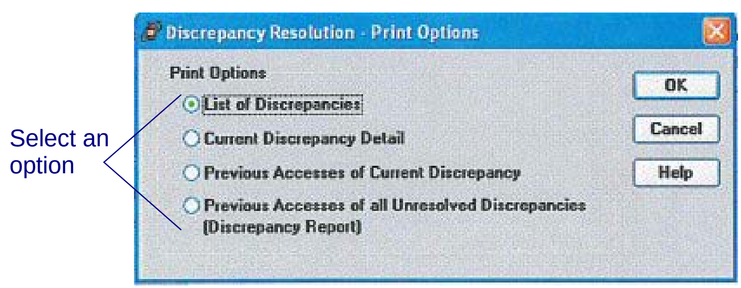
Click ***Print Discrepancy Report*** on the Discrepancy Resolution window.

When a report prints automatically, the number of previous accesses it prints is based on the number you printed the last time you printed the report. You can change the number of previous accesses to print before closing the window.

Printing a Specific Discrepancy Report

Follow the steps below to print a specific discrepancy report.

1. Select File on the toolbar of the AWS main window and select Print to open the Print Options window below.



2. Choose one option and click ***OK***.

   All references to the window for these options are for the Discrepancy Resolution window.

The print option descriptions are:

- List of Discrepancies - Prints the list of all of the discrepancies shown in the top pane of the window.
- Current Discrepancy Detail - Prints the detail shown in the bottom pane of the window.
- Previous Accesses of Current Discrepancy - Prints discrepant event information and the previous accesses to the position highlighted in the window. The number of accesses shown depends on the number specified in the Set Number of Previous Accesses option (refer to Setting the Number of Previous Accesses on page 345).
- Previous Accesses of all Unresolved Discrepancies (Discrepancy Report) - This is the same as the Discrepancy Report. It prints information about the previous accesses to all unresolved discrepant events listed on the Discrepancy Resolution window. The number of accesses depends on the number set in the Set Number of Previous Accesses option (refer to page 345). If there are more than 20 discrepancies, you may want to only print previous accesses for the current discrepancy.

Notes:

Monographs

A drug monograph is a statement that specifies the kinds and amounts of ingredients a drug or class of drugs may contain, the directions for the drug's use, the conditions in which it may be used, and the contraindications to its use. Your site may use MicroMedex software to supply detailed medication information at the display terminal.

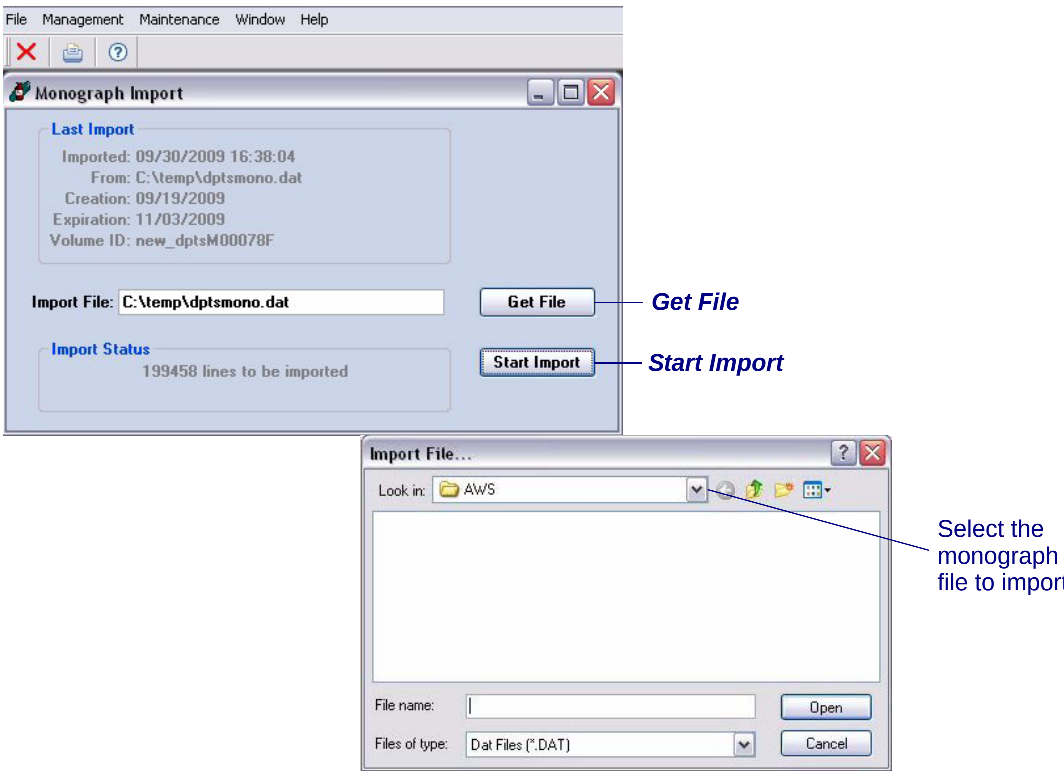
ARxIUM supplies drug monographs, which you import via AWS, to allow users to view drug details at the DT. These details will display on a drug monograph viewer, which is activated when the user touches a list item on the MedOrder browser at the DT. If no monograph exists for the drug, a pop-up window will appear at the DT. to indicate that there is no drug monograph found.

Importing Monographs

Follow the steps below to import a monograph.

1. Select Monograph Import on the Management menu to open the Monograph Import window.

2. Click ***Get File*** to open the Import File window.
3. Select a monograph file in the drop-down box or enter it in the File Name text box and click ***Open***. The file appears in the Import File box if it is available.
4. Click ***Start Import*** to load the database and allow access at the DT.



5. Click ***Cancel*** to close the window.

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