CareFusion

Pyxis® MedStation® 4000 System

Console Quick Reference Guide

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Part Number: 130350-01

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September 2010

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Disclaimer text

The screens that appear depend on the options that are turned on at your console.

This guide shows default user preferences that can be changed at the console.

Accessed Inventory—Editing

1. Select **System Setup > Formulary Management > Formulary**.
2. Select the appropriate Formulary item.
3. Select **Edit**.
4. Select Formulary Data tab and ensure that the Med Class is the same classification chosen in the pharmacy configuration.
5. Select **Save** or **Close** as appropriate.

Allergies—Expanding Feature

1. To manually enter information in the expanded allergies section, go to **System Setup > Patients**.
2. In the Patients screen, you can access the expanded allergies tab when adding a patient or editing a patient. Click **Add** to add a patient.

   or

   Highlight a patient's name and click **Edit**.
3. In the View/Modify screen or the New Patient Setup screen, click the **Allergies** tab.
4. Click **Add** to add new allergy information.

   or

   Highlight an allergy listed in the Allergies tab box and click **Edit** to update information for that allergy.
5. Enter information in the Add/Edit Patient Allergies screen.
   - **Type**—must be filled in. Select a blank entry, DA, FA, MA, and MC from the drop down list.
   - **Severity**—select a blank entry, SV, MO, and MI from the drop down list.
   - **Description**—must be filled in.
   - **Code**—must be filled in when added at the console via this dialog. There are times when the Code field will be blank due to entries created when this feature is turned off or due to interface requirements.
6. Click **OK** to save the information.

Area—Adding

1. Select **System Setup > Area Configuration > Areas**.
2. In the Area & Nurse Unit Maintenance screen, click **Add Area**.
3. In the Add Area screen, enter a name for the area (up to 10 characters) and click **OK**.
4. In the Area List section of the Area and Nurse Unit Maintenance screen, select the area that you created.
5. In the Nursing Units list, select the units that you want to assign to the selected area and click **Add**.
6. Click **Save Area**.
7. To return to the standby screen, click **Close**.

Batch Report—Adding

1. Select **Reports > Batch Reports**.
2. In the Batch Reports screen, click **Add**.
3. In the upper section of the Reports List screen, select the applicable category.
4. In the corresponding list of reports, select the applicable report and click **Select**.
5. Select the applicable options and use the **Select** buttons to configure each qualifier.
6. When you are finished customizing the report, click **Batch Times**.
7. In the Batch Time Setup screen, specify the time and days on which the report should run.
8. Select the machine—console or printer—where the report is to print.
9. In the **Comment** box, enter a comment that helps differentiate this batch report from another report that you or someone else created and click **OK**.
10. In the report screen, click **Save**.
11. To return to the standby screen, click **Close**.

Batch Report—Editing

1. Select **Reports > Batch Reports**.
2. In the Batch Reports screen, select the job that you want to update and click **Edit**.
3. Select the applicable options and use the Select buttons to configure each qualifier.
4. When you are finished updating the customized report options, click **Batch Times**.
5. In the Batch Time Setup screen, update the time and days on which the report should run.
6. If applicable, select a different console or printer where the report is to print.
7. In the **Comment** box, update the information and click **OK**.
8. In the report screen, click **Save**.
9. To return to the standby screen, click **Close**.

Batch Report—Enabling or Disabling

1. Select **Reports > Batch Reports**.
2. In the Batch Reports screen, select the applicable report job and click **Change Status**.

   This button works as a toggle. It changes the Status from ENABLED to DISABLED and back again.
3. To return to the standby screen, click **Close**.

Batch
Report—Enabling or
Disabling

Batch Report—Printing

1. Select **Reports > Batch Reports**.
2. In the Batch Reports screen, select the applicable report and click **Print Now**.
3. In the confirmation screen that appears, click **OK**.
4. To return to the standby screen, click **Close**.

Block Loading on Individual Stations

1. Select **Inventory > Station Inventory.**
2. Select a station, click **Select**.
3. In the Inventory – Meds for [station] screen, click **Block Meds**.

CDC—Activating a Clinical Data Category

1. Select **System Setup > Devices**.
2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Click the **Clin. Data** tab.
4. Select the CDC to activate and click **Activate/Deactivate Clinical Data**.

   When activated, the word Yes appears in the Selected column for the chosen CDC. If deactivated, no information appears in the Selected column for the chosen CDC.
5. When you are finished, click **Save**.

CDC—Adding

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data screen, click **Add**.
3. In the Clinical Data Add screen, enter the new CDC name.
4. Select the applicable category:
   - **Type-in Only**—Displays a free-form text box, into which the user types a response.
   - **Single**—Displays a list of responses.
   - **Multi**—Select from one to three responses from the list when removing or returning a medication.
5. To require the user to enter clinical data, select **Required**.
6. To allow you to enter the clinical data (for example, doctor name) once when removing, wasting, or returning multiple medications for the same patient, select **Once**.
7. If you enter the clinical data only when removing a medication via the override process or the patient's profile, select **Override only**.
8. To allow you to type in free-form text with a Single or Multi category type, select **Type-in allowed**.
9. If only one response list is available for this CDC, select **One List**.
10. To define more than one list for this category, select **Several**.
11. When you are finished, click **OK** to save your changes.
12. To return to the standby screen, click **Close**.

CDC—Adding a Response

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data screen, select the CDC name and click **Edit**.
3. In the Clinical Data Edit screen, select **One List** and click **Add**.
4. In the Add List Name and Responses screen, enter the **Name**.
5. Click **Save**.
6. Click **Add**.
7. In the Add Response screen, enter the response and click **Save**.
8. When the list of responses is complete, click **Close**.
9. Click **Close**.
10. Click **OK** and then click **Close**.
11. In the Clinical Data screen, click **Close**.

Combination Dose—Adding

1. Select **System Setup > Formulary Management > Combination Dose**.
2. In the Combination Dosage Meds screen, click **Add**.
3. In the New Combo Med Setup screen, enter the Generic Name and ID for the combination dose.
4. Click **Add Item**.
5. Select or search for the medication to assign to the combination dose and then click **Select**.
6. In the Enter Med Quantity screen, enter the quantity of the item needed as part of the combination dose and click **OK**.
7. If you need to change the quantity of a member, select the member and click **Edit Quantity**.
8. Click **Save**.
9. In the confirmation message, click **OK**.

Combination
Dose—Adding

Communication Settings—Editing

1. Select **System Setup > Devices**.
2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Click the **Comm** tab.
4. In the **Method** box, type **XT**.
5. In the token section, enter the applicable information:
   - **Token 1**—Specify the IP address.
   - **Token 2**—Specify a network number.
   - **Token 3**—Reserved for user-defined (UA) methods.
6. If you want the console to poll each station for transactions or activities that need to be reported, select the **Polling** check box and indicate when the following should occur:
   - **Poll Data**—If the console sends or receives data for this station in a previous session, specify how often it polls this station.
   - **Poll Fail**—If polling fails, specify how soon the console retries polling.
   - **Poll No Data**—If the console sends or receives no data to this station in the previous session, specify how soon the console polls this station.

Communication
Settings—Editing

Data—Selecting and Archiving

1. Select **Utilities > Archiving**.
2. In the Archiving screen, click **Archive Specification**.
3. In the Archive Specification screen, click **Pocket Access Transactions**.
4. In the Archive Specification for Pocket Access screen, select each option or click **All** of the Pocket Access transactions to archive.
5. Click **Save**.
6. In the Archive Specification screen, click **Close**.
7. In the Archiving* screen, select one or more files to archive.

   The Archive button becomes active.
8. Click **Archive**.
9. In the confirmation message, click **Yes**.

   The file is archived.
10. In the confirmation message, click **Close**.

Discharging a Patient

1. Select **System Setup > Patients**.
2. In the Patients screen, select the applicable patient and click **Discharge**.
3. In the confirmation screen that appears, click **YES** to continue.
4. To return to the standby screen, click **Close**.

Discrepancy—Editing a Resolution Reason

1. Select **System Setup > Pharmacy Configuration > Discrepancy Resolution Reasons**.

2. In the Pharmacy Configuration Discrepancy Resolution Reasons screen, select the applicable reason and click **Edit**.

3. In the Discrepancy Resolution Reasons Edit screen, update the text in the Discrepancy Resolution Reason box with your new reason and click **Save**.

4. To return to the standby screen, click **Close**.

Discrepancy—Editing a
Resolution Reason

Equivalency—Creating

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup screen, click **Create Equivalency**.
3. In the Select med for equivalency creation screen, select a medication on which to base your equivalency.
4. Click **Select**.
5. In the bottom section of the screen, select the medication.
6. Click **Setup Qty**.

   The Equivalency Verification message box appears, suggesting the equivalency relationship. If the dosage forms, strengths, strength units, or medication classes of the two formulary line items do not match, a warning appears.
7. To continue, click **Accept Equivalency**.
8. To save your equivalencies, click **Save**.
9. To return to the standby screen, click **Close**.

Formulary Item—Adding

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary screen, click **Add**.
3. In the upper section of the screen, enter the following:
   - **Generic Name**—Enter an alphanumeric generic name (up to 30 characters) for the formulary item.
   - **Brand Name**—Enter an alphanumeric trade name (up to 30 characters) for the formulary item.
   - **ID—**Enter a unique alphanumeric med ID (up to 15 characters).
   - **Alternate ID**—If required by your site, enter a 15-character alternate ID for the medication.
4. Complete the applicable fields:
   - **Strength**—Describe the amount of the medication per unit.
   - **Strength Units**—Select a unit of strength.
   - **Volume**—Enter the fluid volume of the medication.
   - **Volume Units**—Select a unit of volume.
   - **Dosage Form**—Select the dosage form of the medication.
   - **Therapeutic Classification**—Select the therapeutic classification, which identifies the category of the medication according to use.
   - **Med Class**—Select the medication classification (med class).
   - **Pick Area**—Select the pharmacy location where the medication is stored for station replenishment.

- **Manufacturer**—Select the manufacturer of the medication.
- **Alternate ID 2**—Enter a 22-character, alphanumeric med ID that functions as an additional identification for the medication.
- **Security Group**—Select the security group.
- **Verify count**—Select ON if you want to require the user to count the medications in the pocket each time the pocket is accessed.
- **Override Group** (profile mode only)—Enter the override group to which this medication is assigned.
- **Cost**—Enter the acquisition cost of this medication.
- **Charge**—Enter the amount charged to the patient.
- **Units of Issue**—Enter the number of units of medication per refilling package.
- **Units of Order**—Enter the supplier's package size used for ordering.
- **Package Quantity**—Enter the number in the supplier's package.

5. Click the **Formulary Options** tab.
6. Complete the applicable fields:
    - **Return to Stock**—Allows users to return an unused medication still in its original package to the pocket from which it was removed.
    - **Waste While Removing**—Allows users to waste an unneeded portion of this medication during the Remove process.
    - **Requires Rx Check**—Activates a menu button that displays at the station and indicates that another user must check this

medication whenever it has been loaded or refilled by an individual whose security group requires a witness to check their work.

- **Volume Calculation**—Allows users to calculate the volume of a medication needed for the ordered dose.
- **Remove**—Requires a witness to enter an ID and password during the Remove process for designated medications.
- **Override** (profile mode only)—Requires a witness to enter an ID and password when a user tries to remove this medication for a patient when no order exists.
- **Load Discrepancies**—Indicates that users are not required to resolve discrepancies that are created when loading this medication.
- **All Except Load Discrepancies**—Indicates that users are not required to resolve discrepancies that are created for this medication during all station activities, except when they are being loaded.
- **Display options** (profile mode only)
  - Displays the medication in the medication profile list at the station regardless of whether it is loaded, select **Always**.
  - To display the medication on the station profile list only when it is loaded, select **Only When Loaded**.
- **Print option**—Prints the medication on Ordered Meds Not Loaded bulletins and reports, as necessary.

7. Enter the Remove/Admin +/- Times, in minutes, as necessary:
   - **Before scheduled dose time [Too Early]**—Enter the number of minutes ahead of the scheduled dose time during which it is okay to administer a medication.
   - **After scheduled dose time [Too Late]**—Enter the number of minutes after the scheduled dose time during which it is okay to administer a medication.
   - **After remove/admin same Med, wait for [Too Close]**—Enter the number of minutes after the last time the medication was removed during which the medication cannot be administered again.
8. Click the **Formulary Categories** tab and select the Clinical Data Categories, as needed.
   - **Remove Clinical Data**—Select up to four categories for Remove transactions.
   - **Waste Clinical Data**—Select up to four categories for Waste transactions.
   - **Return Clinical Data**—Select up to four categories for Return transactions.
9. Click **Save** and then click **OK**.
10. To return to the Formulary screen, click **Close**.

Formulary Item—Editing

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary screen, select the applicable medication and click **Edit**.
3. In the View/Modify Formulary screen, update the applicable information and click **Save**.
4. In the confirmation screen that appears, click **YES** to continue.
5. In the second confirmation screen that appears, click **OK** to continue.
6. To return to the standby screen, click **Close**.

Formulary
Item—Editing

Formulary List—Accessing

1. Select **System Setup > Formulary Management > Formulary**.

   The Formulary screen appears, displaying all medications in the formulary.

2. To display the list in a different order or to search for a specific item, use the applicable option:

   - **Generic Name**—Click to display items by their generic names (the default).
   - **Brand Name**—Click to display items by their brand names.
   - **Med Generic Name**—When viewing medications by Generic Name, begin typing the generic name of the item for which you are searching.
   - **Med Brand Name**—When viewing medications by Brand Name, begin typing the brand name of the item for which you are searching.
   - **Med ID**—Begin typing the medication ID (med ID) of the item for which you are searching.
   - **Refresh**—Click to refresh the contents of the list.

3. To return to the standby screen, click **Close**.

General Settings—Editing

1. Select **System Setup > Devices**.
2. In the Devices screen, select the applicable device and click **Edit**.

   The Editing Device screen for the selected device appears with the Settings tab selected.
3. Complete the **Name** box.

   The following sections appear at the top of the screen, but only the name information can be entered.

   - **Name**—Enter up to 10 alphanumeric characters for the name.
   - **Status**—Displays the current status of the station, which might include InService, OutofService, BrainTxPlant, Pending InService, Pending OutofService, or NonLive.
   - **Build #**—Displays the version number of the console software.
   - **Type**—Displays the type of device.
4. Enter the following information in the first section:

   - **Facility**—Select the facility with which the station is associated.
   - **Area**—Select the area to identify which users have access to this station and which patients are displayed at this station.
   - **NUnit Type**—Select the nursing unit where this station is to reside.
   - **Login Mode**—Select the type of logon required for this station:
     - **ID/PASSWORD**—Requires users to log on with a user ID and password.
     - **ID/BIO**—Requires users to log on with a user ID and biometric ID.

Hardware Settings—Editing

This section describes how to complete the Hardware tab.

1. Select **System Setup > Devices**.

2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.

3. Click the **Hardware** tab.

4. Click **Add**.

5. In the Add New Drawer for Device screen, enter the applicable information.

   • **Drawer #**—Enter the drawer number.

   • **Drawer Type**—Select the drawer type from the drop-down list.

   • **Address**—Enter the drawer address (location).

   • **Status**—This box displays the current status of the drawer.

   • **Subdrawer #**—Enter the subdrawer number.

   • **Num of Pkts**—Set the number of pockets for the drawer.

   • **MedCart#**—This box is reserved for future use.

6. When you are finished, click **Save**.

Kit—Editing

1. Select **System Setup > Formulary Management > Kits**.

2. In the Kits screen, select the applicable kit and click **Edit**.

3. To add items to the kit, do the following:
   a. In the View/Modify Kit screen, click **Add Item**.

   b. In the Select Med to Add to Kit screen, select a formulary item to add to the kit and click **Select**.

   c. In the Enter Med Quantity screen, enter the applicable **Quantity** and click **OK**.

   d. To add additional items, repeat steps b and c.

   e. Click **Close** to return to the Select Med to Add to Kit screen.

   f. Click **Close** to return to the Add Kit or View/Modify Kit screen.

4. To change the quantity of an item in the kit, do the following:
   a. In the View/Modify Kit screen, select the item in the Kit Contents list and click **Edit Quantity**.

   b. In the Enter Med Quantity screen, enter the applicable **Quantity** and click **OK**.

5. To remove an item from the contents of the kit, do the following:
   a. Select the item to remove and click **Remove Item**.

   b. In the confirmation message, click **Yes**.

   c. In the second confirmation message, click **OK**.

6. To change the areas associated with the kit, do any of the following:

a. To add an area, select the area and click **Add Area**.

b. To add all areas, click **Add All**.

c. To remove one area, select the area and click **Remove Area**.

d. To remove all areas, click **Remove All**.

7. Click **Save**.

8. In the confirmation message, click **OK**.

9. To return to the standby screen, click **Close**.

List—Adding an Item

1. Select **System Setup > Pharmacy Configuration > Formulary/Station Lists**.
2. In the Pharmacy Configuration – Formulary/Station Lists screen, select a list name and click **Edit**.
3. In the screen that appears (the name depends on the item that you selected in the previous step), click **Add** to add an item to the list.
4. In the Add List Entry screen, enter the new item and click **OK**.
5. To return to the standby screen, click **Close**.

List—Editing

1. Select **System Setup >Pharmacy Configuration > Formulary/Station Lists**.

2. In the Pharmacy Configuration – Formulary/Station Lists screen, select an item and click **Edit**.

3. In the screen that appears (the name depends on the item that you selected in the previous step), select the applicable item and click **Edit**.

4. In the Edit List Entry screen, update the applicable information and click **OK**.

5. Click **Close**.

6. To return to the standby screen, click **Close**.

Logging In and Off

When no one is logged in to the console, the
standby screen displays the Login, Window
CommStatus, and Help menu options. Your
system administrator provides you with a user ID
and a first-time Password.

Logging In

1. In the standby screen, click **Login,** click on
   the screen, or press **Enter**.
2. In the Console User Login screen, enter your
   ID and password and click **OK**.

   The menu bar appears.

Logging Off

1. Select **Logoff**.
   • The standby screen appears.

Maintenance Options—Specifying

1. Select **System Setup > Site Specific Options**.
2. In the Site Information screen, click the **Maintenance** tab.
3. To edit the schedule or options of a maintenance task, select the task name in the Maintenance Schedule section.
4. Click **Edit Maintenance Schedule**.
5. In the **Start Time** box, enter the time at which you want the maintenance cycle to begin.
6. If applicable, in the **Data History** box, enter the number of days to include in the maintenance cycle (from 7 to 31).
7. To indicate when the task should run, select the applicable **Active Days** check boxes.
8. If applicable, do the following:
   • **Discharge if inactive** (Patients maintenance)—Enter the number of days after which patients without transactions are discharged from the facility.
   • **Inactivity notification** (Users maintenance)—Enter the number of days after which a service message is logged for users who have not performed any transactions.
9. Click **OK** and then click **Save**.
10. In the confirmation screen that appears, click **OK**.

Medication Classification—Adding

1. Select **System Setup > Pharmacy Configuration > Med Classifications**.
2. In the Pharmacy Configuration – Med Classifications screen, click **Add**.
3. In the Med Classification Add screen, enter a character for the medication classification in the **Class** box.
4. Enter the new medication-classification name in the **Class Name** box and click **Save**.
5. Click **Close**.

Medication Privileges—Editing

1. Select **System Setup > Devices**.
2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Click the **Med Privileges** tab.
4. In the Temporary User Med Privileges section, select the groups to which temporary users can have access at the station.
5. After you are finished entering the information on the various tabs, click **Save**.
6. In the confirmation screen that appears, click **OK** to continue.
7. To return to the standby screen, click **Close**.

Medication Warning—Viewing or Modifying

1. Select **System Setup > Site Specific Options**.
2. Click the **Warnings** tab.
3. In the **Default Remove/Admin. +/- Times** section, enter the facility-wide value for the type of warnings that you want to set system-wide.
4. In the Dosage Warnings section, clear the **Show 'Please re-check Your Entry' warning for variable dose med** check box if you do not want the station to warn users when they remove a variable dose that exceeds the strength allowed by the order.
5. Click **Save**.
6. When the confirmation screen appears, click **OK** to return to the standby screen.

Medication
Warning—Viewing or
Medicine

Nursing Unit—Adding a

1. Select **System Setup > Area Configuration > Areas**.
2. In the Area & Nurse Unit Maintenance screen, click **Add Unit**.
3. In the Add Nursing Unit screen, enter a name for the unit and click **OK**.
4. To change the auto-discharge time (the default is one year), do the following:
   a. Select the nursing unit and click **Auto-Discharge Time**.
   b. In the Auto Discharge Time screen, enter the auto-discharge time in hours and click **OK**.
5. To return to the standby screen, click **Close**.

Optional Attention Notices—Activating

1. Select **System Setup > Site Specific Options**.
2. Click the **Bulletins** tab.
3. Select one or more of the check boxes.
   - **Stock Out**—Displays a medication that is stocked out and when (sorted by device).
   - **Stock Critical Low**—Displays the medication that has reached low capacity and must be refilled.
   - **Rx Check**—Shows what medication needs an Rx Check and when it last needed it (sorted by device).
   - **Discrepancy**—Shows quantity of discrepancy sorted by medication name, device, drawer, and time.
   - **Ordered Med Not Loaded**—Available in profile mode. Identifies ordered medications not loaded, followed by the order dose, route, frequency text, note, order number, valid (start and stop times for an order), patient name and ID, location, room/bed, and stations where the medication is not loaded or is pending load.
   - **Allow Equivalencies**—Notifies that an equivalency can be administered. Use in conjunction with the Ordered Med Not Loaded option.
   - **NCR Bulletin**—Used to notify the customer if an issue had arisen with the billing port.
   - **Temperature Out of Range**—Notifies the user that the SMART Remote Manager's temperature is out of range.
4. Click **Save**.

5. In the confirmation screen that appears, click **OK** to continue.

Override Group Name—Customizing

1. Select **System Setup > Pharmacy Configuration > Override Group Names**.
2. Select a name to update and click **Edit**.
3. In the Override Group Name Edit screen, enter the new name in the **Group Name** box and click **Save**.
4. To return to the standby screen, click **Close**.

Override Group
Name—Customizing

Patient File—Adding a

1. Select **System Setup > Patients**.
2. In the Patients screen, click **Add**.
3. In the upper section of the screen, enter the following:
   - **First Name**—Enter the patient's first name (up to 20 characters).
   - **Last Name**—Enter the patient's last name (up to 20 characters).
   - **I.D.**—Enter the patient's unique ID, usually the account number or medical record number.
   - **Alt. ID 1**—If your facility requires an alternate ID, enter it here.
   - **Alt. ID 2**—If your facility requires a second alternate ID, enter it here.
4. On the Location tab, enter the following:
   - **Facility**—Select the facility with which the station and patient are associated.
   - **Nursing Unit**—Select unit where the patient is located.
   - **Room**—Enter the room number where the patient is located.
   - **Bed**—Enter the bed where the patient is located.
   - **Visit Nurse Unit**—Select the nursing unit where the patient is temporarily located.
   - **Visit Discharge**—Enter the date and time at which the patient visit to the temporary location is expected to end.
   - **Admission Date**—Enter the date and time that indicates when the patient was admitted to the facility (the default is the current date and time).
   - **Auto-Discharge Date**—Enter the date and time at which the patient is expected

to be discharged from the original room and board (usually defaults to one year).

5. Click the **Comments** tab.
6. Enter the following:
   - **Patient comments**—Enter any relevant comments regarding this patient (for example, no visitors or hearing impaired).
   - **Admitting Dr.**—Enter the name of the admitting physician.
   - **Attending Dr.**—Enter the name of the attending physician.
   - **DRG Code**—Enter the diagnosis-related group (DRG) code.
   - **Patient Scan Code**—Enter this information by scanning it or typing it.
7. Click the **Clinical** tab.
8. Enter the applicable information.
   - **Date of birth**—Enter the date of birth in mm/dd/yyyy format.
   - **Sex**—Select male (M), female (F), or unknown (U).
   - **Height**—Enter the patient's height and select the applicable measurement unit.
   - **Weight**—Enter the patient's weight and select the applicable measurement unit.
   - **Estimate**—If the height and weight are unverified, select this box.
   - **Diagnosis**—Enter a text-based description of the patient's condition.
9. Click the **Order Data** tab.
10. To get to the New Order Setup screen, click **Add**.
11. Enter the order information for your patient in these areas:
    - **Order**—Determined by your facility.

- **Order Description**—Enter the order description.
- Type (select one):
  - **Scheduled**—Administer as scheduled.
  - **PRN**—Administer as needed. 1/10/08 Not visible on my system.
  - **STAT**—An immediate order.
- **Flag** (check boxes):
  - **Allow Equivalency**—If the order is temporarily on hold, clear this box.
  - **Hold Order**—If the order is temporarily on hold, select this check box. The order can still be viewed at the station but cannot be removed. Clear this option to resume a hold order.
  - **Give ONCE**—If the order is administered to the patient only once, not at regular intervals (for example, STAT, Now, Pre-Op, On Call), select this check box.
- **Freq**—Enter the dosing interval or frequency.
- **Rate**—Enter the prescribed rate.
- **Infusion Time**—Enter the prescribed infusion time.
- **Order Start**—Enter the date and time that the order is to begin.
- **Order Stop**—Enter the date and time that the order is to end.
- **Interval Dosing**—Another method to activate the Remove by Time option is to use interval dosing. When enabled, the station can predict the future dosing times for the medication.

- **Scheduled Times**—If applicable, you can click **Add** to enter specific dosing times for this order.
- **Give only on**—If the order is given only on certain days of the week, select the boxes for the appropriate days.
- **Every other day**—Select this option for orders given on alternate days.
- **Notes**—Enter any other notes or comments related to this order.
- **Dr. Name**—Enter the name of the prescribing physician.

12. **DEA Num**.—Enter the Drug Enforcement Administration (DEA) number of the prescribing physician.
13. Click **Generic Name** or **Brand Name**.
14. Click the medication name.
15. Click **Select**. The Add/Edit Med Dose in Order screen appears.
16. In the Add/Edit Med Dose in Order screen, enter the following information:
    - **Ordered Qty**—enter the prescribed quantity.
    - **Ordered Strength**—enter the prescribed strength.
    - **Ordered Volume**—enter the prescribed volume.
17. Click **OK**. You are returned to the New Order Setup screen with the Med Info tab populated by the information you provided.
18. Click **Save**. You are returned to the New Patient Setup screen with the Order Data tab populated by the information you provided.
19. Click the **Allergies** tab.
20. In the Allergies box, enter any known allergies (the default messages indicates that allergies are not known).

21. Click **Save**.
22. In the confirmation message, click **OK**.
23. To return to the standby screen, click **Close**.

Patient File—Editing

1. Select **System Setup > Patients**.
2. In the Patients screen, select the applicable patient and click **Edit**.
3. In the View/Modify Patient screen, update the applicable information.
4. Click **Save**.
5. To return to the standby screen, click **Close**.

Pending Medication—Clearing

1. Select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station screen, select the station to load the medications and click **Select**.
3. In the Inventory – Meds For screen, select the name of the pending medication to clear and click **Clear Pend Med**.
4. In the confirmation screen that appears, click **YES** to clear the pocket.

Pocket—Assigning a Medication

CAUTION
Under testing conditions with an empty station, the temperature of certain locations within a station may reach up to 4.5°C (8°F) above ambient temperature in the room. Be aware of this when storing temperature-sensitive products.

1. Select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station screen, select the station into which you want to load medications into and click **Select**.
3. Click **Assign New Med**.
4. In the Inventory – Select a Med screen, select the medication, and click **Select**.
5. In the Inventory – Select a Drawer screen, select the drawer to assign the medication to, and click **Select**.
6. If you selected a MiniDrawer, do the following when the next Inventory – Select a Drawer screen appears:
   a. If the MiniDrawer does not currently have pending or loaded medications, select one of the following types of dispensing drawers:
      • **Matrix**—The drawer is treated as a regular matrix drawer—each pocket is assigned a different medication.
      • **Multidose**—All pockets in the drawer are assigned the same medication and each pocket can contain a varied quantity of that medication.
      • **Singledose**—All pockets in the drawer are assigned the same medication and each pocket can contain no more than one medication.

b. If the MiniDrawer does having pending or loaded medications, it is preconfigured as a Matrix multi-drawer or single drawer.

c. Click **Select** and then click **YES** when the confirmation screen appears.

d. If you selected Matrix for this MiniDrawer, select the applicable pockets when the Inventory – Select a Pocket screen appears and then click **Select**.

7. If you selected a different type of drawer (not a MiniDrawer), select the pocket to load the medication into when the Inventory – Select a Pocket screen appears and click **Select**.

8. When the Inventory – Assign Med For screen appears (the information displayed in this screen varies based on the type of drawer that you selected), select the **Standard** check box if this is a standard medication.

9. If applicable, select an Override Group from the list.

10. To enable the system to check the expiration date of the medications stored in this station and pocket, select the **Outdate Tracking** check box.

11. If applicable, select the **Remove Fractional Units** check box.

12. Assign the **Max**, **Min**, and **Current** values:
    • **Max**—The maximum number of this medication loaded in the pocket.
    • **Min**—The count or level at which the medication should be refilled.
    • **Current**—The actual number of this medication that you intend to load in this pocket.

13. To save your changes and return to the Inventory – Meds For screen, click **Save**.

Pocket—Making Unavailable

1. Select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station screen, select the station for which you want to make medications unavailable and click **Select**.
3. In the Inventory – Meds For screen, click **Unavailable** in the Sort by section of the screen.
4. Click **Make Unavailable**.
5. In the Inventory – Select a Drawer screen, select the drawer that contains the pocket that you want to make unavailable and click **Select**.
6. In the Inventory – Select a Pocket screen, select the pocket that you want to make unavailable, and click **Select**.
7. In the Inventory – Meds For screen, click **Close** to complete the process.

Pocket—Making
Unavailable

Pre-admit Hold Order—Using Enhanced

Allows MedStation system transactions for patients who are in the facility's HIS system before they arrive at the unit.

1. Select **System Setup > Devices**.
2. Select Device Name.
3. Select **Edit**.
4. Select Settings tab.
5. Enter the desired hold time in the Pre-Admit Lead Time field.
6. Select **Save**.

Pre-admit Hold
Order—Using
Enhanced

Profile Mode—Editing the Settings

1. Select **System Setup > Devices**.
2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Click the **Rx** tab.
4. In the Critical Override section, select the check boxes for the applicable options:
   - **Manual Enable**—To allow users access to all medications loaded at this station, select this option.
   - **Manual Enable on Downtime or delay time**—To allow users access to all medications loaded at this station when the station is unavailable, select this option.
   - **Use Schedule**—To schedule a time during which a station in profile mode automatically goes into critical override mode, select this check box and click **View/Edit Schedule**. In the Critical Override Schedule screen, select the applicable options and click **OK**.
5. In the Override Groups section, select the check boxes for the applicable options.
6. Update the lead and lag time, as necessary:
   - **Order Lead Time**—Enter the number of hours (from 0–99) *before* the start time that an order is made active at the station.
   - **Order Lag Time**—Enter the number of hours *after* the stop time that an order remains active at the station.
7. If you are planning to enable profile mode at the station in the near future, and you currently want the station to receive orders

but not display them, select the **Enable** check box in the Temporary Non-RX Mode section.

8. Select the applicable options:
   - **Interface Status Banners**—Select to display interface status banners if the profile interface is down or delayed.
   - **Due Time On Remove**—Select to display the message.
   - **Show Patient Summary**—Select to display an overview of patient information when using the Patients option at the station.
   - **Charting On Remove**—Select to chart when medications are removed.
   - **Meds Due Reminder**—Select to be reminded when medications are due.

Reconciling Billing

1. To set up this feature, select **System Setup > Patients**.

2. In the Patients screen, click **Reconcile Billing**.

   The Patient Reconciliation screen appears.

3. In the Permanent Patient section, click **Change** to load patient information.

4. In the Temporary Patient section, click **Change** to load patient information.

5. Click **Reconcile Billing** to populate the patient name, ID, room, and bed fields associated with the patient information.

   or

   Click **Close** in the dialog box if you do not want to populate the Reconcile Patients screen with the patient information.

   Once both sets of fields are populated, the **Add To List** button is enabled.

6. Click the button to add a change record with permanent and temporary patient data in a list box without affecting the system data yet.

   A temporary patient may only be associated with one permanent patient. A permanent patient may be associated with multiple temporary patients.

7. Select a record in the Patient Reconcile List box to enable the **Remove From List** button. Click the button to remove the change record from the list box.

8. When the list box contains entries, the **Reconcile Billing** button is enabled.

   When the button is clicked, a dialog box appears asking if you want to continue reconciling.

9. Click **Cancel** to close the dialog without affecting system data. If data is in the list box, a dialog box appears asking if you want to cancel.

Temporary patients that have already been reconciled to a permanent patient may not be reconciled again. You cannot add patients already reconciled to the list box.

Report—Generating

1. Select **Reports > Run Reports**.
2. In the upper section of the Reports List screen, select a category.
3. In the corresponding list of reports, select the applicable report and click **Select**.
4. Select the applicable options.
5. If applicable, click **Select** for each qualifier, select the applicable information in the screen that appears. Click **Add > OK** to return to the main screen.
6. To view the report information on the screen, click **Preview**.
7. To print the report, click **Print** and then click **OK** when the confirmation screen appears that indicates that the report has been added to the queue.
8. Click **Exit** to return to the previous screen.

Report—Selecting Options

1. Select **System Setup > Site Specific Options**.

2. In the Site Information screen, click the **Reports** tab to enter the report options for your facility.

3. In the Report Time box, enter the time at which you want the reporting period to begin.

4. In the Time Options section, complete the following:

   • **Report Time**—Enter the time at which the reporting period should begin, that is, the start time of the 24-hour reporting period for all console reports.

   • **Ordered Meds Not Loaded report looks ___ in the future for orders**—Enter the number of hours and minutes into the future that the report must consider when identifying medication orders that have been requested but are not loaded at the station.

5. In the Report Options section, select the check box for any of the following to ensure that these steps are always taken when the applicable report is generated:

   • **Sort Console Activity Reports By ID**—Sort all Activity reports by the med ID.

   • **Suppress User ID on Station & Console Reports**—Hide user IDs on all station and console reports.

   • **Show Cost/Charge Info on Inventory by Station and Hosp.Wide Med Summary Reports**—Display cost and charge information on the Inventory By Station and Hospital Wide Med Summary reports.

- **Show Charge Info on Console Billing Summary and Charges & Credits Reports**—Display charge information on the Billing Summary and Charges & Credit reports.
- **Exclude "UNKNOWN" meds from Ordered Meds Not Loaded Report**—Do not display medications whose name is identified as UNKNOWN on the Ordered Meds Not Loaded report.
- **Show HOLD orders on selected Inventory Reports**—Include orders that are on hold on the Inventory reports.

6. In the Inventory, System, Activity, and System Activity sections, select the check boxes for information that you want to display every time on any report in that category:
   - **Brand Name**—Displays the medication's brand name.
   - **Alt ID**—Displays the medication's alternate ID.
   - **Units of Issue**—Displays the item's number of units of medication per refilling package.

7. Click **Save**.

8. In the confirmation screen that appears, click **OK** to continue.

Scan Code—Adding

1. Select **System Setup > Pharmacy Configuration > Scan Code Maintenance**.
2. Click **Add**.
3. When the Pharmacy Configuration – Scan Code Maintenance screen appears, scan or manually enter the new code.
4. Click **Select Med** and select the formulary item that you want to associate with the scan code.
5. Specify medication quantity in the Qty field.
6. Click **Save**.
7. Click **Close**.
8. To return to the standby screen, click **Close**.

Scan on Load/Refill—Enabling

This feature allows a facility to require scanning of a medication scancode during the load/refill processes.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary screen, highlight the medication.
3. Click **Edit**.

   The View/Modify Formulary screen appears.
4. Click **Formulary Options** tab.
5. Check the **Scan on Load/Refill** box.
6. Click **Save**.
7. Click **OK**.

Scan on Remove—Enabling

This feature allows a facility to require scanning of a medication scancode during the remove process.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary screen, highlight the medication.
3. Click **Edit**. The View/Modify Formulary screen appears.
4. Click **Formulary Options** tab.
5. Check the **Scan on Remove** box.
6. Click **Save**.
7. Click **OK**.

Scan on Remove—Enabling

Station—Adding

1. Select **System Setup > Devices**.
2. In the Devices screen, click **Add**.
3. In the Device Type Selection screen, select the type.
4. Click **OK**.

    The Adding New Device screen appears.

    *   **Zone**—Enter a code that relates to a specific region of the facility, such as an entire floor, building, or wing.
    *   **Anchor Page**—Select the setting that controls how long the station remains accessible from the Pick a Med or Pick a Patient screen without going through a login process.
    *   **Show Patient 2nd ID**—Select from the drop-down list determined by your facility.
    *   **InService/OutofService**—Allows you to change the service status of the displayed station.
    *   **Brain Transplant**—Restores a station's database from an error condition, such as a corrupted file, which prevents the station from operating correctly.

5. Set the timeout options, as necessary:
    *   **Anch Pg Timeout**—In hours (0–99) and minutes (0–59), enter the time after which the Anchor Page expires and you are logged off due to keyboard inactivity.
    *   **Menu Timeout**—In minutes (0–99) and seconds (0–59), enter the time after which you are logged out due to lack of activity at the station.
    *   **Discharge Delay**—In hours (0–99) and minutes (0–59), enter the time to keep a

patient's information accessible at the station after that patient is discharged.

- **Tx Hold Time**—Enter the number of hours (1–32) transaction information is held at the station to appear on station reports.
- **Open Drw Timeout**—In minutes (0–99) and seconds (0–59), enter the time after which the station beeps and you are logged off because a drawer is left open and there is no keyboard or monitor activity.
- **Patient Keep Time**—In hours (1–99) and minutes (0–59), enter the time to retain a temporary patient record that was manually added at the station.
- **Temp/Activated User**—Enter the number of hours (0–99) temporary users remain active after they are created at the station.
- **DB Maintenance at**—Checks for expired users and deletes them. Checks for discharged patients and deletes them.
- **Pre-Admit Lead Time**—Allows MedStation system transactions for patients that are in the facility's HIS system before they arrive at the unit.

6. In the Print Slips For section, select the check boxes for the applicable options.

7. In the Witness Required To section, select the check boxes for the applicable options:
   - **Remove**—Requires a witness for a medication removal.
   - **Empty Return Bin**—Requires a witness when the bin is emptied.

8. In the No Witness Required section, select the check boxes for the applicable options:

- **Return to Stock**—Eliminates the requirement for a witness when a medication is returned to stock.
- **Return to Bin**—Eliminates the requirement for a witness when a medication is returned to the Return Bin.

9. In the last section, select the check boxes for the applicable options:
   - **Outdating**—Assists with managing the expiration time of the medications stored in the specified station.
   - **Return to Stock**—Allows users to return unused medications in their original, unopened packages to the drawer and pocket from which they were removed.
   - **Witness Once**—Prompts only once for a witness for all the medications on the list, rather than prompting for a witness on each medication.
   - **Allergy Information**—Displays allergy information at the station.
   - **Waste While Removing**—Wastes during the remove process.
   - **Volume Calculation**—Allows you to convert strength units to volume units upon removal of a medication.
   - **Blind Count**—Provides the option to have count verification require you to enter the quantity blind instead of showing you the expected beginning count and asking you to confirm or correct it.
   - **Receives All ADTs**—Normally, only the ADT information for a station's area is sent to a station.
   - **Display Last Access**—Transmits throughout the MedStation system to all stations where the patient name is listed.

- **Remove Warning**—Displays a screen advising you not to remove the requested medication because it is too early or too late compared to the order dose time, or too close compared to the previous removal.
- **Scanning Required**—Allows a facility to require scanning of a medication scancode during the remove process.
- **Undocumented Waste**—Allows a facility to track any and all remove transactions in which a user removes a quantity greater than the ordered dose.

Station—Editing Privileges

1. Select **System Setup > Devices**.
2. In the Devices screen, select the device and click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Click the **Station Privileges** tab.
4. Select the applicable options:
   - **Station Login/Witness Ability**—Allows limited access to the station with no ability to access drawers.
   - **Station Report Access**—Allows you run any report at the station.
   - **Activate/Create Temporary User**—Lets you activate the password of a temporary user (typically a float nurse) on a station to which he or she does not usually have access.
   - **Credit Patients**—Lets you credit a patient when wasting a complete dose of a medication.
   - **Admit/Edit/Discharge Patients**—Lets you admit, update, or discharge patients at the station.
   - **Create Permanent Users**—Lets you create permanent users at the station.
   - **Station Administrator**—Lets you perform initial setup and ongoing troubleshooting of the MedStation.
   - **No Witness Required**—Lets you waste, return, or inventory medication without a witness even though the selected medication's security group requires a witness.
   - **Assign/Load Access**—Lets you select a pocket for a medication and to place the medication physically into that pocket.

- **Add Temporary Patients**—Lets you add temporary patients at the station.
- **Independent Inventory Count**—Lets you inventory medications without a witness.
- **Independent Discrepancy Documentation**—Users can document discrepancies at the station without a witness.
- **Independent Load**—Lets you load a medication that requires Rx Check without having an authorized user check the medication.
- **Independent Refill**—Lets you refill a medication that requires Rx Check without having an authorized user check the medication.
- **Unload Standard Stock**—Shows which items are standard stock in the Unload list.

5. When you are finished, click **Save**.

System—Specifying Options

1. Select **System Setup > Site Specific Options**.
2. In the Site Information screen, click the **System** tab.
3. Enter the applicable information:
   - **Form Feed**—Advances the paper to the next page, select this box.
   - **Expire Initial Password**—Forces the user to enter a new password during the first logon attempt, select this box.
   - **Outdate Tracking**—Allows expiration date tracking at Load, Refill, and Return to Stock, select this box.
   - **Accept Clinical Patient Info Via Interface**—If your facility has an ADT interface that provides clinical patient information such as allergies, height, weight, sex, and age, select this box to allow the system to accept and display it.
   - **Archive File ID**—For archive files. This identifier differentiates archive data from this system from other sources of archive data.
   - **Archive Drive**—Select the applicable drive for archiving.
   - **Entered ADT Billing Hold Time**—If your system has an automated billing interface, enter the number of hours that the interface computer (Procar) holds charges for manually entered patients.
   - **Password Expiration**—Indicates the length of time that the password remains valid after the first log on or after you change your password.

- **Minimum Password Length**—This affects only new passwords, not existing ones.
- **Stock Critical Low At**—Percentage of the minimum value to queue a warning.
- **Patient ID Format**—If your facility uses a specific format for patient ID, enter the format's template here.
- **BioID Push to Witness**—Requires a witness to verify your identity if you fail to log on successfully with BioID.
- **BioID Push to Password**—Requires you to logon using your password after three failed BioID logon attempts.

4. Click **Save**.
5. In the confirmation screen that appears, click **OK**.

Undocumented Waste—Enabling

This feature allows a facility to track any and all remove transactions in which a user removes a quantity greater than the ordered dose.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary screen, highlight the medication.
3. Click **Edit**. The View/Modify Formulary screen appears.
4. Click **Formulary Options** tab.
5. Check the **Undocumented Waste** box.
6. Click **Save**.
7. Click **OK**.

Users—Adding

1. Select **System Setup > Users**.

2. In the Users screen, click **Add**.

3. In the upper section of the screen, complete the following fields:

   • **User ID**—Enter a unique user ID (up to 10 characters).

   • **First Name**—Enter the user's first name (up to 20 characters).

   • **Last Name**—Enter the user's last name (up to 20 characters).

   • **Password**—Enter a temporary password for the user.

   • **Confirm Password**—Enter the temporary password again.

   • **ID valid until**—Select the date and time at which the account expires.

   • **Initials**—Enter the user's initials.

   • **Title**—Select the user's job title.

4. On the Areas tab, do one of the following:

   • To provide access to all areas in the system (for example, for a pharmacy employee that refills or loads medications at any station), click **All Areas**.

   • To prevent a user from having permanent access to any area (for example, for float nurses who will be activated at a specific station for a specific area when they are on duty), click **No Areas**.

   • To select up to six specific areas that the user can access, click **Select Areas**, select the areas in the **Available** list, and click **Add**.

   • To select up to six specific areas that the user cannot access (the user will be able to access all remaining areas), click **Exclude**

Areas, select the areas in the **Available** list and click **Add**.

5. In the BioID section of the Areas tab, indicate whether the user must log on with a user ID and biometric ID (click **Use BioID**) or with a user ID and password (click **Use Password**).

6. Click the **Console Privileges** tab.

7. Select the applicable options:

   - **Basic Pharmacy Privileges**—Allows you to access the Inventory menu, assign medications to pockets that are not granted through medication privileges, add and modify formulary items, and access reports and the archival feature.

   - **User Entry**—Allows you to add, edit, or delete user-access privileges and user templates.

   - **Add/Edit/Deactivate User Template**—Allows you to create, modify, or delete a template at the console.

   - **Order Entry**—Allows you to add, edit, and delete patient orders at the console.

   - **Pharmacy Supervisor**—Allows you to manage all clinical information at the console.

   - **System Administrator**—Allows you to add, modify, and delete devices, including changing the drawer style and number of pockets for a matrix drawer, placing a station in or out of service, altering station-to-console communications, and running brain transplants.

8. Click the **Station Privileges** tab.

9. Select the applicable options:

   - **Station Login/Witness Ability**—Allows you to act as a witness and provides

limited access to the station with no ability to access drawers.

- **Station Report Access**—Allows you to run any report at the station.
- **Activate/Create Temporary User**—Allows you to activate another user's ID and password on a station to which that user does not normally have access.
- **Credit Patients**—Allows you to credit the patient when wasting a complete dose of a medication.
- **Admit/Edit/Discharge Patients**—Allows you to admit, edit, or discharge patients at the station.
- **Create Permanent Users**—Allows you to create permanent users at the station.
- **Station Administrator**—Allows you to modify device settings, including changing the drawer style and number of pockets, shutting down a station, placing a station in or out of service, altering communications, calibrating a touch screen, and transplanting data.
- **No Witness Required**—Allows you to waste, return, or inventory medication without a witness even though the selected medication's security group requires a witness.
- **Assign/Load Access**—Allows you to select a pocket for a medication and to place the medication physically into that pocket.
- **Add Temporary Patients**—Allows you to process items for a patient who is not in the station's patient database (typically

occurs because ADT is behind or if the patient is visiting from another unit).

- **Independent Inventory Control**—Allows an inventory count without a witness.
- **Independent Discrepancy Documentation**—Allows you to document discrepancies at the station without a witness.
- **Independent Load**—Allows you to load a medication that requires Rx Check without having another user check the medication.
- **Independent Refill**—Allows you to refill a medication that requires Rx Check without having another user check the medication.
- **Unload Standard Stock**—Standard functionality prohibits users from unloading a standard stock item by filtering them out of the Unload list unless another item is pending to replace it, or you have this privilege.
- **CD ROM Access**—Allows access to the CD-ROM, which can also play music CDs. (This option applies to Anesthesia System.)
- **My Items**—Allows you to maintain a virtual remote stock of items necessary for administering medications to patients.

10. Click the **Med Privileges** tab.
11. In the Security Groups section, select the applicable group for each function listed.
12. Select the override groups that you can access at the station.
13. After you have finished adding the medication privileges, click **Save**.

14. When the confirmation message appears, click **OK**.
15. To return to the standby screen, click **Close**.

User—Creating Privileges Template

1. Select **System Setup > Users**.
2. At the top of the Users screen, click **Privilege Templates**.
3. In the User Template Selection screen, click **Add**.
4. In the Add New Template screen, enter a name for the template.
5. On the Console Privileges tab, select the applicable options.
6. Click the **Station Privileges** tab and select the applicable options.
7. Click the **Med Privileges** tab and select the applicable options.
8. Click **Save**.
9. In the confirmation message, click **OK**.
10. Click **Close** to return to the User Template Selection screen.
11. To return to the standby screen, click **Close**.

Users—Editing an Existing

1. Select **System Setup > Users**.
2. In the Users screen, select the applicable user and click **Edit**.
3. Update the applicable information on each tab.
4. Click **Save**.
5. To return to the standby screen, click **Close**.

Users—Filtering List

1. Select **System Setup > Users**.
2. In the Users screen, click **List by**.
3. In the Users – Display Users Who Meet the Following Criteria screen, do one of the following:
   - To display users in a specific area, select the area from the **In area** list.
   - To display all active users, click **Show all active users**.
   - To display all users whose logon expires within a specific number of days, click **Show users invalid within** and indicate the number of days.
   - To search for a user by name, ID, or initials, enter the information in the applicable box in the Search section.
4. To return to the Users screen, click **User List**.
5. To return to the standby screen, click **Close**.

Variable Dose—Adding

1. Select **System Setup > Formulary Management > Variable Dose**.

2. In the Variable Dosage Meds screen, click **Add**.

3. Enter the details for the medication:
   - **Generic Name**—Enter an alphanumeric generic name (up to 30 characters) for the variable dosage.
   - **Brand Name**—Enter an alphanumeric trade name (up to 30 characters) for the variable dosage.
   - **ID**—Enter a unique alphanumeric med ID (up to 15 characters).
   - **Alternate ID**—If required by your site, enter a 15-character alternate ID for the variable dose.

4. Enter the Range details:
   - **Minimum**—Enter the minimum dosage range.
   - **Maximum**—Enter the maximum dosage range.

5. Select the appropriate Units for the dosage:
   - **Strength Units**—Select to measure the variable dose in Strength Units.
   - **Volume Units**—Select to measure the variable dose in Volume Units.

6. Select the appropriate strength or volume unit from the associated list.

7. Complete the following:
   - **Dosage Form**—Select the dosage form for the variable dose.
   - **Alternate ID 2**—Enter an alphanumeric med ID (up to 15 characters) that functions as an additional identification for the medication.

8. To select formulary items as choices for the variable dose, click the **Members** tab.

9. Click **Select Candidates**.

10. In the Variable Dose: Candidate Selection screen, select a formulary item that is within the desired range from the formulary list and then click **Select**.

11. In the Variable Dosage Med Setup screen, select a candidate to add to the variable dose and click **Add**.

12. To save the variable-dose definition, click **Save**.

13. To return to the standby screen, click **Close**.