CareFusion

Pyxis® MedStation® 3500 System

Console Quick Reference Guide

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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.

Log in

1. From the Standby screen, select **Login** or press **Enter**.

   The Console User Login screen appears.

2. Enter your User ID and Password.

3. Click **OK** to complete the login process.

   The background on the screen changes color, and the full Main Menu appears.

Log out

From the Main Menu, select **Logoff**.

The Standby screen appears.

Add a Station

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

   The Devices screen appears.

2. Click **Add**.

   The Device Type Selection screen appears.

3. Select the Station's device type.

4. Click **OK**.

   The Adding New Device screen appears.

Add a Station

Edit the settings for a device

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

   The Devices screen appears.

2. Click **Edit**.

   The Editing Device screen appears and displays the Settings tab.

3. Edit the Settings options, including:

   - **Name**—Is an alphanumeric character name for the Station. The nursing unit name is commonly used. The maximum number of characters in the Name is ten.

   - **Status**—Displays the current status of the Station. The status options are: InService, OutofService, BrainTxPlant, Pending InService, Pending OutofService or NonLive.

   - **Build**—Displays the version number of the Pyxis MedStation® 3500 System Console software. A CareFusion representative may ask for the Build number when assisting you with your system.

   - **Type**—Displays this Station's type.

   - **Facility**—Specifies facility with which the Station is associated. This field is used primarily by hospitals with affiliations or those that have merged and are made up of more than one hospital or nursing home.

   - **Area**—Determines which users have access to the Station and which patients are displayed at this Station.

   - **NUnit Type**—Nursing unit where this Station resides.

   - **Login Mode**—Type of login required for this Station:
     ID/Password—Requires users to log in with a user ID and password.

ID/BIO—Provides the most security, requiring users to log in with a user ID and Biometric ID.

- **Zone**—Refers to a specific region of the hospital, such as an entire floor, building or wing. Stations within that region are assigned the same zone to facilitate inventory tasks. Many Console reports print information sorted by zone.

- **Anchor Page**—Allows the Station to remain accessible for a longer period of time from the Pick a Med or Pick a Patient screen without going through a login process.

- **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.

4. Set the timeout options, including:

- **Anch Pg Timeout**—Time period after which the Anchor Page expires and the Login screen is redisplayed.

- **Menu Timeout**—Time period after which the user is logged out due to no keyboard activity at the Station.

- **Discharge Delay**—Length of time to keep patient information accessible at the Station after the patient is discharged.

- **TX Hold Time**—Length of time information is held at the Station to appear on Station reports.

- **Open Drw Timout**—Length of time after which the Station beeps and times out (returns to the Login screen) because a

drawer is left open and there is no keyboard or monitor activity.

- **Patient Keep Time**—Time period to keep a temp patient that was manually added at the Station.
- **Temp/Activate User**—Activates users for areas other than their primary areas.
- **DB Maintenance at (option)**—Checks for and deletes expired users and discharged patients.

5. Set the **Print Slips For** options for **Remove**, **Load/Unload**, **Refill**, **Inventory**, **Return**, **Waste**, and **Outdate Removal**.

6. Set the **Witness Required To** options for **Remove** and **Empty Return Bin**.

7. Set the **No Witness Required** options for **Return to Stock** and **Return to Bin**.

8. Set the remaining options, as necessary:
   - **Outdating**—Prompts user to enter the expiration date.
   - **Return to Stock**—Return unused medications in their original, unopened packages to the drawer and pocket from which they were removed.
   - **Witness Once**—Prompts once for a witness for all the medications rather than for each medication.
   - **Allergy Information**—Displays allergy information (from ADT system).
   - **Waste While Removing**—Wastes during the remove process.
   - **Volume Calculations**—Convert strength units to volume units upon removal of a medication.
   - **Blind Count**—Requires the user to enter the quantity blind instead of showing the expected beginning count.

- **Receive All ADTs**—Send all ADT information to this Station.
- **Display Last Access**—Transmits throughout the Pyxis MedStation® 3500 System system to all Stations where the patient appears.
- **Remove Warning**—Displays message advising that requested medication should not be removed because it is too early or too late compared to order dose time or too close compared to previous removal.
- **Past Due Warning**—Triggers the Past Due Warning icon at the Station when a dose is late or missed, according to the Too Late parameters.

Edit the Comm options for a device

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

   The Devices screen appears.

2. Click **Edit**.

3. Select the **Comm** tab.

4. Edit the **Comm** options, as necessary:

   - **Method**—Enter the method by which the device communicates with the Console. Select **XT**.

   - **Token 1**—Specify the IP address.

   - **Token 2**—Specify a network number.

   - **Token 3**—Reserved for user-defined (UA) methods.

   - **Polling**—Do not turn off polling unless advised by a CareFusion representative.

   - **Poll Data**—Specifies how often the Console polls this Station.

   - **Poll Fail**—Specifies how soon the Console retries polling after failure.

   - **Poll No Data**—If the Console sent or received no data to this Station in the previous session, this value specifies how soon the Console polls this Station.

Edit the Comm options
for a device

Edit the Rx options

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

   The Devices screen appears.

2. Click **Edit**.

   The Editing Device screen appears and displays the Settings tab.

3. Select the **Rx** tab.

4. Edit Critical Override information, as necessary:

   - **Manual Enable**—Allows user access to all medications loaded at this Station via the Critical Override feature.

   - **Manual Enable on Downtime or delay time**—Enter the time period after which the profile interface is down or delayed that the Station automatically goes into critical override.

   - **Use Schedule**—Schedule a time during which a Station in Profilemode automatically goes into Critical Override mode.

   - **View/Edit Schedule**—Set the schedule for scheduled critical override mode.

5. Update the following information, as necessary:

   - **Order Lead Time**—Length of time before the start time that a new order is made active at the Station.

   - **Order Lag Time**—Number of hours after the stop time an order remains active at the Station.

   - **Temporary Non-RX Mode**—Select **Enable** to allow the Station to receive orders, but not display them.

   - **Override Groups**—To override a patient's profile at this Station, select at least one of these override groups.

- **Interface Status Banners**—Display interface status banners if the profile interface is down or delayed.
- **MedStation SN**—Display interface status banners if the profile interface is down or delayed.
- **Due Time on Remove**—Display the message.
- **Charting on Remove**—Chart when medications are removed. Removal time is the administration time.
- **Meds Due Reminder**—Display a reminder when medications are due.
- **Order Confirmation Warning**—Display a warning message for orders that have been confirmed.
- **Show Patient Summary**—Display an overview of patient information when using the Patients option.

Edit hardware options

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

   The Devices screen appears.

2. Click **Edit**.

   The Editing Device screen appears and displays the Settings tab.

3. Select the **Hardware** tab.

4. Click **Add** to add a drawer.

   The Adding New Drawer for Device screen appears.

5. To edit a drawer, select the drawer, then click **Edit**. To delete the drawer configuration, click **Delete**.

6. Enter the applicable information.

7. Click **Save**.

8. Edit the Hardware options, as necessary:

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

   • **Drawer Type**—Select the drawer type.

   • **Address**—Enter the drawer address.

   • **Status**—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 field is reserved for future use.

Activate/deactivate CDCs

1. Select the **System Setup > Devices** menu.
2. Click **Edit**.

   The Editing Device screen appears and displays the Settings tab.
3. Select the **Clin. Data** tab.

   The Clin. Data tab appears, listing all clinical data categories that have been defined in Clinical Data. *Yes* in the Selected column indicates that the CDC is activated for this Station.
4. Select the CDC to activate or deactivate.
5. Click **Activate/Deactivate Clinical Data**.

   If activated, *Yes* appears in the Selected column for the chosen CDC. If deactivated, no information appears in the Selected column for the chosen CDC.
6. Click **Close.**

Activate/deactivate CDCs

Edit station privileges

1. Select the **System Setup > Devices** menu.
2. Click **Edit**.
3. Select the **Station Privileges** tab.
4. Edit the Station Privileges options, as necessary:
   - **Station Login/Witness Ability**—Allows limited access to the Station with no ability to access drawers.
   - **Station Report Access**—Allows a user to run any report at the Station.
   - **Activate/Create Temporary User**—Allows a user to activate the password of a temporary user on a Station to which they normally do not have access.
   - **Credit Patients**—Allows a user to credit the patient when wasting a complete dose of a medication.
   - **Admit/Edit/Discharge Patients**—Allows a user to admit, edit, or discharge patients at the Station.
   - **Create Permanent Users**—Allows a user to create permanent users at the Station.
   - **Station Administrator**—Allows users to perform initial setup and ongoing troubleshooting of the system.
   - **No Witness Required**—Allows users to waste, return, or inventory without a witness, even when the selected medication's security group requires a witness.
   - **Assign/Load Access**—Allows the user to select a pocket for a medication and to physically place the medication into that pocket.

- **Add Temporary Patients**—Allows users to add temporary patients at the Station.
- **Independent Inventory Count**—Allows a user to inventory medications without a witness.
- **Independent Discrepancy Documentation**—Allows users to document discrepancies at the Station without a witness.
- **Independent Load**—Allows users to load a medication that requires Rx Check without having an authorized user check the medication.
- **Independent Refill**—Allows users to 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. Users confirm before proceeding.

Edit med privileges

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

   The Devices screen appears.

2. Click **Edit**.

   The Editing Device screen appears and displays the Settings tab.

3. Select the **Med Privileges** tab.

4. Select the **Security Group** to activate.
   • Click **All** to select all groups.
   • Click **None** to clear all security groups for a particular function.

5. Click one or more override groups to which temporary users may have access at the Station.

6. Click **Save**.

7. Click **OK**.

8. Click **Close**.

Access the formulary list

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

   The Formulary screen appears.

2. Perform any of the following, as necessary:
   - **Generic Name**—Display medications by their generic names.
   - **Brand Name**—Display medications by their brand names.
   - **Med Generic Name**—Begin typing the generic name of the medication for which you are searching. The system attempts to match the medication character by character as you type.
   - **Med Brand Name**—When viewing medications by Brand Name, the system attempts to match the medication character by character as you type.
   - **Med ID**—Begin typing the ID of the medication for which you are searching. The system attempts to match the medication character by character as you type.
   - **Add**—Add a medication to the Formulary list.
   - **Edit**—Edit the selected medication.
   - **Delete**—Delete the selected medication from the Formulary list
   - **Refresh**—Refresh the contents of the Formulary list.

3. Click **Close** to return to the Main Menu.

Access the formulary list

Add a formulary item

1. Select the **System Setup > Formulary Management > Formulary** menu.
2. Click **Add**.
3. Enter the details for the medication.
4. Enter information on the **Formulary Data** tab.
5. Select the **Formulary Options** tab.
6. Enter the Med Options details:
   - **Return to Stock**—Return an unused medication in its original package.
   - **Waste While Removing**—Waste an unneeded portion of this medication during the Remove process.
   - **Requires RX Check**—Require the user to check the medication.
   - **Volume Calculation**—Calculate the volume of a medication for the ordered dose.
7. Enter the Witness Required To details.
8. Enter the Auto Resolve Discrepancy Options.
9. Set the Display and Print options.
10. Enter the Remove/Admin +/- Times, in minutes.
11. Select the **Formulary Categories** tab and select Clinical Data Categories:
    - **Remove Clinical Data**—Select up to four CDCs for Remove transactions.
    - **Waste Clinical Data**—Select up to four CDCs for Waste transactions.
    - **Return Clinical Data**—Select up to four CDCs for Return transactions.
12. Click **Save**, and then click **OK**.

Add a formulary item

Modify or view a formulary item

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

   The Formulary screen appears.

2. Select the medication.

3. Click **Edit**.

   The View/Modify screen appears.

4. Edit the applicable information.

5. Click **Save**.

   A Console confirmation message appears.

6. Click **OK.**

   The Formulary screen appears.

Modify or view a
formulary item

Create an equivalency

1. Select the **System Setup > Formulary Management > Equivalencies** menu.
2. Click **Create Equivalency**.
3. Select a medication on which to base your equivalency.
4. Select the medication from the lower screen.
5. Click **Setup Qty**.
6. Click **Accept Equivalency**.
7. Click **Save**.

Add a variable dose

1. Select the **System Setup > Formulary Management > Variable Dose** menu.
2. Click **Add**.
3. Enter the details for the medication.
4. Enter the Minimum and Maximum Range details.
5. Select the appropriate Units for the dosage.
6. Select the appropriate strength or volume unit.
7. Complete the Dosage Form.
8. To select formulary items as choices for the variable dose, select the **Members** tab.
9. Click **Select Candidates**.
10. Click a formulary item, and then click **Select**.
11. Select a candidate to add.
12. Click **Add**, and then click **Save**.

Add a variable dose

Add combination dose

1. Select the **System Setup > Formulary Management > Combination Dose** menu.
2. Click **Add**.
3. Enter the Generic Name and ID for the combination dose.
4. Click **Add Item**.
5. Click the medication to assign.
6. Click **Select**.
7. Enter the quantity of the item needed as part of the combination dose.
8. Click **OK**.
9. To change the quantity of a member, select the member, then click **Edit Quantity**.
10. Click **Remove Item** to delete a member.
11. Click **Save**.
12. Click **OK**.

Add combination dose

Add an item to a kit

1. From the Kits screen, click **Add Item**.
2. Click a formulary item to add to the kit, then click **Select**.
3. Enter the applicable **Quantity**.
4. Click **OK**.

   If necessary, continue selecting kit items here, repeating steps 2-4.
5. Click **Close.**

Add an item to a kit

Add an area to a kit

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

   The Kits screen appears.

2. Click **Edit.**

   The View/Modify Kit screen appears.

3. Click **Add Area** or **Add All**.

Add an area to a kit

Filter the list of users

1. Select the **System Setup > Users** menu.
2. Click **List by...**.
   The Users screen appears.
3. To display users in a particular area (or all areas), select the area's name (or select all areas) from the In Area drop-down list.
4. To display all active users, select **Show All Active Users**.
5. To display all users that expire within a specific number of days, select the **Show Users Invalid Within** and indicate the number of days.
6. To search for a user by name or ID, enter the information in the appropriate search field.
7. Click **User List** to return to the Users screen.

Filter the list of users

Add a user

1. Select the **System Setup > Users** menu.
2. Click **Add**.
3. Edit the user details.
4. Click **Save**.

Add a user

Edit an existing user

1. Select the **System Setup > Users** menu.
2. Select the user's name.
3. Click **Edit**.
4. Edit the user details, as necessary.
5. Edit the information on the additional tabs.
6. Click **Save**.

Edit an existing user

Create a privilege template

1. Select the **System Setup > Users** menu.
2. Select **Privilege Templates**.
3. Click **Add**.
4. Enter a name for your template.
5. Enter the applicable Console privileges.
6. Select the **Station Privileges** tab.
7. Enter the applicable Station privileges.
8. Select the **Med Privileges** tab.
9. Select the applicable medication privileges.
10. Click **Save**.

    A confirmation screen appears.
11. Click **OK**.
12. Click **Close** to return to the User Template Selection screen.
13. Click **Close** to return to the Main Menu.

Create a privilege template

Add a patient

1. From the System Setup menu, select **Patients**.
2. Click **Add**.
3. Select the **Location** tab and enter the patient's information.
4. Select the **Comments** tab and enter the patient's information.
5. Select the **Clinical** tab and enter the patient's information.
6. Select the **Order Data** tab and enter the patient's information.
   - **Freq**—Enter dosing interval or frequency.
   - **Order Start**—Enter date and time the order starts.
   - **Order Stop**—Enter date and time the order ends.
   - **Hold Order**—Select if the order is temporarily on hold.
   - **Allow Equivalencies**—Deselect if an equivalency is not used.
   - **Give Once**—Select if the order is administered to the patient once.
   - **PRN**—Select if the order is administered as needed.
   - **Dosing Times** (optional)—If applicable, click **Add** to enter specific dosing times.
   - **Interval Dosing** (optional)—Another method to activate the Remove by Time option.
   - **Give only on** (optional)—Select if order is given only on certain days of the week.
   - **Every other day**—Select for orders given on alternate days.
   - **Notes**—Enter notes for the order.

- **Dr. Name**—Enter the prescribing physician name.
- **DEA Num.** (optional)—Enter the DEA number of the prescribing physician.

7. Click **Save.**
8. Click **OK** to confirm.

Edit a patient

1. From the System Setup menu, select **Patients**.
2. Select the patient's name.
3. Click **Edit**.
4. Edit the patient's information.
5. Click **Save**.

Edit a patient

Discharge a patient

1. From the System Setup menu, select **Patients**.
2. Select the patient's name to discharge.
3. Click **Discharge**.
4. Click **Yes** to discharge.

Add an area

1. From the System Setup menu, select **Areas**.
2. Click **Add Area**.
3. Enter the new area's name.
4. Click **OK**.
5. Click **Save Area**.
6. Click **Close** to return to the Main Menu.

Add a nursing unit

1. From the System Setup menu, select **Areas**.
2. Click **Add Unit**.
3. Enter a nursing unit name.
4. Click **OK**.
5. To change the auto-discharge time, select the nursing unit, and click **Auto Discharge Time**.

   The default setting is one year.

6. Enter the auto-discharge time in hours and click **OK**.

Add a nursing unit

Edit a new CDC

1. Select **System Setup > Clinical Data**.
2. Select the CDC name.
3. Click **Edit**.
4. Enter the new category name in the **Name** field.
5. Select either **Single**, **Multi**, or **Type-in Only**, depending on the type of category to define.
   - **Type-in Only**—Displays a free-form text field, into which the user types a response.
   - **Single**—Displays a list of responses. The user selects one item from the response list when removing, wasting, or returning the medication.
   - **Multi**—Allows the user to select from one to three responses from the list when removing or returning a medication.
6. Select **Required** to require the user to enter clinical data.
7. Select **Once** to allow the user to enter the clinical data once for the same patient.
8. Select **Override Only** if the user enters the clinical data only when removing a medication via override or profile.
9. Select **Type-in Allowed** to allow the user to enter free-form text.
10. Select **One List** if there is one response list for this CDC.
11. Select **Several** to define more than one list for this category.

Edit a new CDC

Add responses for a CDC

1. Select **System Setup > Clinical Data**.
2. Select the CDC name.
3. Click **Edit**.
4. Select **One List**.
5. Click **Add**.
6. Enter the List Name.
7. Click **Save**.
8. Click **OK**.
9. Click **Add**.
10. Enter the response.
11. Click **Save**.

    The Add Responses screen appears.

12. Click **Close** when the list of responses is complete.
13. Click **Close**.

    The Clinical Data Edit screen appears with the new Clinical Data List.

14. Click **OK**.
15. Click **Close**.

    The Clinical Data screen appears.

16. Click **Close**.

    The Main Menu appears.

Add responses for a
CDC

Specify System options

1. Select **System Setup > Site Specific Options**.
2. Select the **System** tab.
3. Enter the applicable information, including:
   - **Form Feed—**Advance the paper to the next page.
   - **Accept Clinical Patient Info Via Interface**—Allow the system to accept and display clinical patient information.
   - **Outdate Tracking**—Allow expiration date tracking at Load, Refill, and Return to Stock.
   - **Expire Initial Password**—Force the user to enter a new password during the first login.
   - **Archive File ID**—Differentiates archive data from other sources of archive data.
   - **Archive Drive**—Select the drive for archiving.
   - **Entered ADT Billing Hold Time**—Number of hours the interface computer (Procar) holds charges for manually entered patients.
   - **Password Expiration**—Indicates the length of time password remains valid after the first log in.
   - **Minimum Password Length**—Affects only new passwords, not existing ones.
   - **Stock Critical Low**—The minimum value at which to queue a warning.
   - **Patient ID Format**—If your hospital uses a specific format for patient ID, enter the format's template here.

- **BioID Push to Witness**—Require a witness to verify users who failed to log in successfully with BioID.
- **BioID Push to Password**—Require a user to scan his or her fingerprint after a failed BioID login attempt.

4. Click **Save**.
5. Click **OK**.

Activate optional attention notices

1. Select **System Setup > Site Specific Options**.
2. Select the **Bulletins** tab.
3. Select one or more of the check boxes.
   - **Stock Out**—Displays a medication that is stocked out and when.
   - **Stock Critical Low**—Displays the medication that has reached low capacity and should be refilled.
   - **RxCheck**—Shows what medication needs an RxCheck and when it last needed it.
   - **Discrepancy**—Shows quantity of discrepancy sorted by medication name, device, drawer, and time.
   - **Ordered Med Not Loaded (Profile mode)**—Identifies ordered medications not loaded, dose, route, frequency text, note, order number, start and stop times, 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.
   - **NCR Bulletin**—Notifies that an issue had arisen with the billing port.
   - **Temperature Out of Range**—Notifies that the Smart Remote Manager's temperature is out of range.
4. Click **Save.**

Select report options

1. Select **System Setup > Site Specific Options**.
2. Select the **Reports** tab to enter the report options for your hospital.
3. Enter a report time value in **Time Options**.
4. Select the applicable check boxes that you would like to apply for your hospital's reports.
5. Click **Save** to save the changes.

Select report options

Set maintenance options

1. Select **System Setup > Site Specific Options**.
2. Select the **Maintenance** tab to access the Maintenance page.
3. To edit the schedule or options of a maintenance task, select the task name in the **Maintenance Schedule** portion of the page.
4. Click **Edit Maintenance Schedule**.
5. Enter the time to start the maintenance cycle in the Start Time field.
6. Enter the number of days to include in the maintenance cycle in the Data History field.
7. In the Active Days boxes, select the days of the week to run the maintenance task.
8. Complete the following, if applicable.
   • **Discharge if Inactive** (Patients maintenance)—Enter the number of days after which patients without transactions are discharged from the hospital. Set this value greater than or equal to the activities hold time set at the Devices screen.
   • **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 **Save**.
10. Click **OK**.

Set maintenance options

Modify medication warnings

1. Select **System Setup > Site Specific Options**.
2. Select the **Warnings** tab.
3. Enter number of minutes for Before Schedule Dose time.
4. Enter number of minutes for After Schedule Dose time.
5. Enter number of minutes for After Remove/ Admin Same Med.
6. Click **Save**.
7. Click **Close**.

Modify medication
warnings

Change override group names

1. From the System Setup menu, select **Pharmacy Configuration**.
2. Select **Override Group Names**.
3. Select a name to edit.
4. Click **Edit.**
5. Enter the new override group name.
6. Click **Save**.

Change override group names

Add a new medication class

1. From the main menu, select **System Setup >Pharmacy Configuration > Med Classifications**.
2. Click **Add**.
3. Enter a character for the Class.
4. Enter the new Class Name.
5. Click **Save**.

Add a new medication class

Edit resolution reasons

1. From the main menu, select **System Setup >Pharmacy Configuration > Discrepancy Resolution Reasons**.

2. Select the discrepancy resolution reason and click **Add** or **Edit**.

3. Replace the text in the Discrepancy Resolution Reason field with your new reason.

4. Click **Save**.

Add a pick list

1. From the main menu, select **System Setup >Pharmacy Configuration > Discrepancy Resolution Reasons > Formulary/Station Lists.**
2. Select a list name.
3. Click **Edit**.
4. To add an item, click **Add**.
5. Enter the new list item in the Add/Edit Entry screen.
6. Click **OK**.
7. Click **Cancel.**

Add a pick list

Edit a list

1. From the main menu, select **System Setup >Pharmacy Configuration > Discrepancy Resolution Reasons > Formulary/Station Lists.**
2. Select a list name.
3. Click **Edit**.
4. Select the list item to edit.
5. Click **Edit**.
6. Modify the name in the Add/Edit Entry screen.
7. Click **OK**.
8. Click **Close.**

Edit a list

Add a scan code

1. From the Main Menu, select **Pharmacy > Scan Code Maintenance**.
2. Click **Add**.
3. Scan or enter the new code.
4. Click **Save**.

Add a scan code

Archiving transactions

1. From the Main Menu, select **Utilities > Archiving**.
2. Click **Archive Specification**.
3. Select **Pocket Access Transactions, User Transactions, Document Discrepancy Transactions,** or **Temperature Log Transactions.**
4. Select the fields to archive.
5. To select all fields, click **All**.
6. Click **Save**.
7. Select one or more files to archive.
8. Click **Archive**.
9. Click **Yes** to proceed.
   The file is archived.
10. Click **OK** to confirm.

Archiving transactions

Assign a medication to a pocket

1. From the Main Menu, select **Inventory**.
2. Select the Station to load the medication(s) and click **Select**.
3. Click **Assign New Med**.
4. Select **Generic Name** or **Brand Name** to view the medications.
5. Select the medication and click **Select**.
6. Select the drawer to assign the medication and click **Select**.
7. Select the drawer type.

   If not a MiniDrawer, go to step 8.

   If a MiniDrawer select **Matrix**, **Multidose**, or **Singledose** drawer dispensing type.
8. Skip to Step 10 to complete the assignment of the medication(s) to a MiniDrawer.

   Select the pocket to load the medication into and click **Select**.
9. Define pocket information and options.
10. Select the Standard box if this is a standard medication.
11. Select an override group from the drop-down list.
12. To check the expiration date of stored medications, select **Outdate Tracking**.
13. To allow removal of the medication in fractional units, select **Remove Fractional Units**.
14. Enter values for the Max, Min, and Current fields.
15. Click **Save**.

Assign a medication to a pocket

Clear pending medications

1. From the Main Menu, select **Inventory**.
2. Select the Station, then click **Select**.
3. Select the name of the pending medication to clear and click **Clear Pend Med**.
4. Click **Yes** to clear the pocket.

Clear pending
medications

Make a pocket unavailable

1. From the Main Menu, select **Inventory**.
2. Select the Station with medications to make unavailable and click **Select**.
3. Click **Unavailable** in the sort by section of the screen.
4. Click **Make Unavailable**.
5. Select the drawer containing the pocket to make unavailable and click **Select**.
6. Select the pocket to make unavailable and click **Select**.
7. Click **Close** to complete the process.

Make a pocket
unavailable

Generate a report

1. From the Main Menu, select **Reports > Run Reports**.
2. Select a category for reports.
3. Select a report and click **Select**.
4. Select the applicable options at the top of the screen.
5. If applicable, click **Select** for qualifiers.
6. Select the applicable information.
7. To view the report information, click **Preview**.
8. Click **Exit** to close the report.

Create a batch report

1. From the Main Menu, select **Reports > Batch Reports**.
2. Click **Add**.
3. Select a category for reports.
4. Select a report and click **Select**.
5. Customize the report by selecting the qualifier parameters.
6. Click **Batch Times.**
7. Specify the **Report Time** the batch report is to run.
8. Select the **Machine** where the report prints.
9. Select the days of the week to run the report.
10. Enter a Comment to identify this batch.
11. Click **Save Batch** to save the batch report.
12. Click **Close** to return to the Main Menu.

Create a batch report

Edit a batch report

1. From the Main Menu, select **Reports > Batch Reports**.
2. Select the report to edit.
3. Click **Edit**.
4. Customize the report by selecting the qualifier parameters.
5. Click **Batch Times.**
6. Specify the Report Time the batch report is to run.
7. Select the **Machine** where the report is to print.
8. Select the days of the week to run the report.
9. Enter a comment to identify this batch.
10. Click **Save Batch** to save the batch report.
11. Click **Close** to return to the Main Menu.

Edit a batch report

Enable/disable a batch report

1. From the Main Menu, select **Reports > Batch Reports**.
2. Select the report to enable/disable.
3. Click **Change Status**.
4. Click **Close** to return to the Main Menu.

Enable/disable a batch report

Print a batch report

1. From the Main Menu, select **Reports > Batch Reports**.
2. Select the report to print.
3. Click **Print Now**.
4. Click **OK** to print.
5. Click **Close** to return to the Main Menu.