



Pyxis MedStation™ 4000 System

Console User Guide

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Information to User

Caution: Any changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

FCC

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) this device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

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This Class A digital apparatus complies with Canadian ICES-003.

Cet appareil numérique de la classe A est conforme à la norme NMB-003 du Canada.

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About this guide

This guide provides information on how to set up, use, and maintain the Pyxis MedStation™ 4000 system console.

This guide does TMnot cover service and repair procedures. It focuses on the daily use, minor maintenance, and troubleshooting of the system.

For information about the product that is not covered in this document, call the Technical Support Center (TSC) for Pyxis® products at **800.727.6102**.

Conventions

This guide uses the following conventions:

- The names of document titles, cross-references, and text that requires emphasis are formatted in *italics*.
- The names of buttons, menu commands, options, icons, file names, and folders are formatted in **bold**.
- User input is formatted in **Courier bold**.
- Programming code is formatted in `Courier fixed width`.

CAUTION

Caution indicates a potentially hazardous situation which, if not avoided, could result in minor or moderate injury. Caution is also used to alert against unsafe practices that could result in unpredictable results or data loss.

NOTE

Notes contain supplementary information or emphasize a point or procedure.

Overview of this guide

This guide includes the following information about the console.

- **Chapter 1, System overview**—Provides an overview of system features and components, and the system's network configuration.
- **Chapter 2, Console Basics**—Explains how to use the console and includes procedures for logging on and off the system.
- **Chapter 3, Setting Up the System**—Describes how to set up system information unique to your hospital, such as station names and options, users, patients, and the formulary.
- **Chapter 4, Utilities**—Describes how to use system management functions at the console.
- **Chapter 5, Inventory**—Describes how to use the Inventory feature to manage your hospital's inventory as it moves from the Pharmacy out to the patient.
- **Chapter 6, Reports**—Provides reports, report descriptions, procedures for generating reports, and batch reports information that can help you to monitor and manage your system.
- **Appendix A, Troubleshooting**—Provides remedies to potential problems involving the console and its components.
- **Appendix D, Management and Monitoring Recommendations**—Provides security recommendations, system configuration recommendations, and examples of controlled substance procedures for operating rooms (ORs) and anesthesiology in hospitals where MedStation system is used.
- **Glossary**—Defines system terminology.
- **Index**

Chapter 1

System overview

The Pyxis MedStation system automates the distribution, management, and control of medications. The Pyxis MedStation system includes a network of secure storage stations located in patient-care areas throughout the facility. Each station is controlled by its own microprocessor and functions similar to an automated bank-teller machine. This section includes the following topics:

<i>The total medication solution</i>	2
<i>Unit-dose workflow</i>	3
<i>Pyxis MedStation system components</i>	4
<i>Network information</i>	6
<i>System communication</i>	8

The total medication solution

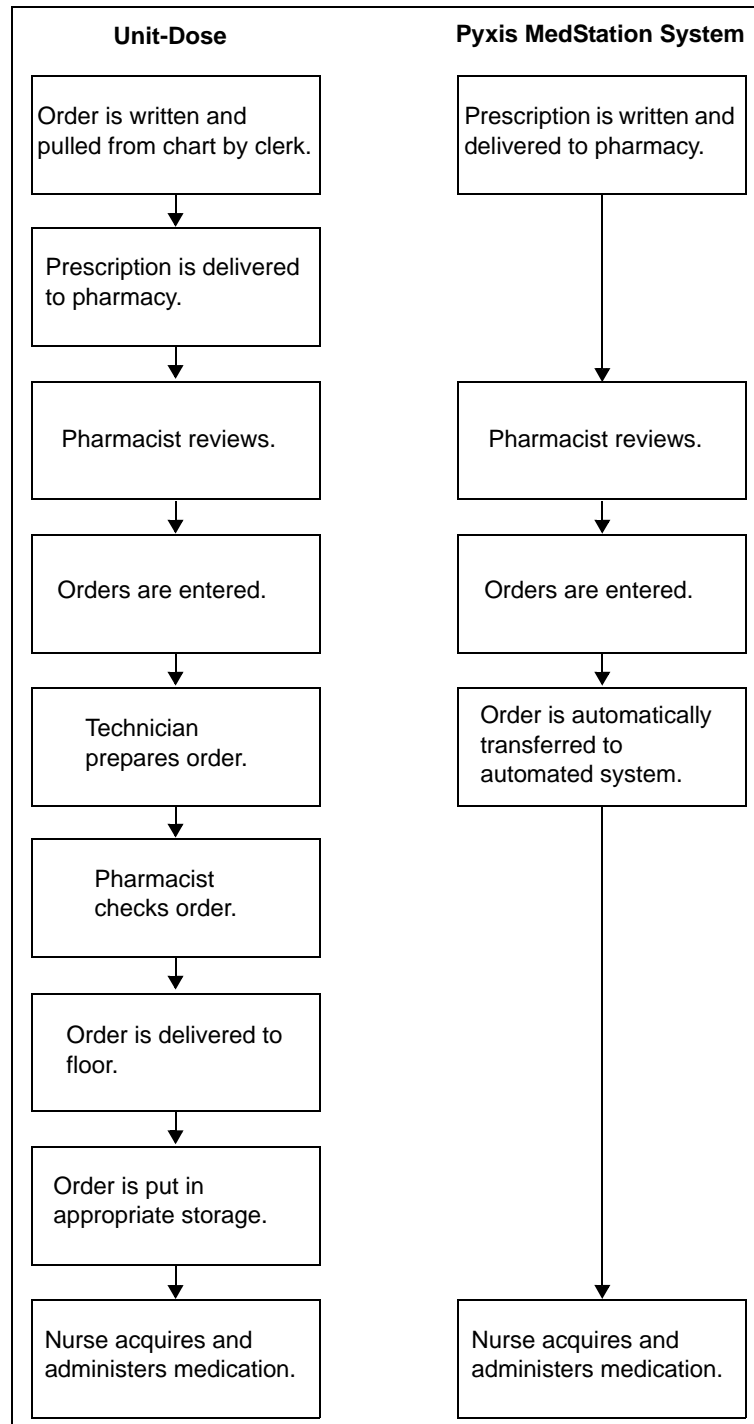
The Pyxis MedStation system allows a pharmacy to store and track a range of medications and floor-stock items. Depending on your needs, the Pyxis MedStation system can manage:

- Controlled medications
- Floor stock
- Pro re natas (PRNs) (profile mode recommended)
- First doses (profile mode recommended)
- Some IV solutions and sets
- Up to 95% of all medications (profile mode only)

The actual amount of medication storage depends on your station configurations and other factors. The Pyxis MedStation system is flexible and has many configuration options to accommodate your needs and requirements.

Unit-dose workflow

Most pharmacy and nursing managers understand the benefit of having medications available at all times on the nursing unit. The following flowchart represents the differences between the traditional unit-dose system and the Pyxis MedStation system. The Pyxis MedStation system is able to reduce nine identified points of potential time delays and errors down to a manageable five.



Pyxis MedStation system components

The Pyxis MedStation system is custom-configured for your facility's needs and for the way you do business. The Pyxis MedStation system components include the following:

- **Console (one or more)**—The console is the central controller and clearinghouse for all stations. Network connections provide the communications path between the components. The console is usually located in the pharmacy and stations are located throughout the facility.

The console provides the management interface to enter and collect information. It performs the following functions:

- Communicates data to and updates activity information in all the stations.
- Maintains copies of all patient, user, formulary, and activity information used to generate pharmacy reports.

In some facilities, an additional computer, monitor, and keyboard can be added in a second location as another console access point. This is also known as a console workstation.

Pyxis® Procar, also a part of the console subsystem, is responsible for interface communications, including the admissions, discharge, and transfer (ADT) and billing information and, if you use profile mode, the pharmacy software system link (patient orders and other pharmacy profile information). CareFusion representatives configure and install the Pyxis MedStation system for you.

NOTE

The Pyxis MedStation system communications hardware and software interfaces are proprietary.

- **Stations (one or more)**—The stations are the clients in the setup. They provide secure and reliable storage for medications of all types. They communicate with the console, receiving patient, order (profile mode only) and inventory information, while continuously reporting all medication transactions. Stations come in a variety of configurations, with a selection of configurable drawers and doors to meet the needs of the various areas.
- **Printer**—The console includes a high-speed laser printer for printing reports.
- **Optional Component (Pyxis® Connect)**—the Pyxis MedStation system incorporates the Pyxis Connect product. The nurse-monitor station is a tool used outside the pharmacy, on each unit where a scan station is placed, to monitor the status of orders in the Pyxis Connect system. The nurse-monitor station software is usually installed on computers in the nursing unit and used by nurses to track orders that have been scanned from particular locations. Nurses can check the status of an order at the same station from which they attempted to remove a medication. If a nurse discovers that a new drug is not yet on the patient's profile, he or she can log on to Pyxis Connect from the Pyxis MedStation system to check the status of the order.

- **Scanner**—A scanner capable of reading linear and 2D barcode symbols is standard equipment on both the station and the console.

Network information

Pyxis Procar translates patient information from the hospital's host information system into a usable format for the Pyxis MedStation system. It serves as a connection between the console and the hospital's ADT, billing, and clinical (patient-profile) pharmacy systems.

NOTE

Some hospital or pharmacy vendors require additional hardware and software to accomplish this interface. Your CareFusion representative works with you to determine the requirements for your facility.

The communications link between the console and the stations is interactive. The console receives patient information from the hospital's information system (ADT), correlates it with the correct nursing unit and area, and sends it to the appropriate stations.

NOTE

CareFusion provides long-term data-archive and reporting systems to track inventory and clinical data. For more information, contact your CareFusion representative.

The console communicates with each station after a specified time interval depending on setup and the amount of activity. Information is automatically retrieved and subsequently stored when any change in status, such as medication removal, occurs. The activities are then forwarded to the hospital's billing system through Pyxis Procar.

Comprehensive reporting

Many facilities have numerous stations located throughout a variety of patient-care areas, so comprehensive and accurate reporting is critical to the pharmacist and system manager.

The console, located in the pharmacy, retains up to 31 days of transaction data for all stations, including:

- Medication removals and returns
- Wasted medications
- Refill activities
- Discrepancy-resolution information
- Inventory verification

Reports on every aspect of the Pyxis MedStation system—including pocket accesses, inventory, patient ADT, orders (profile mode only), and formulary—are available from the console, located in the pharmacy. Data can be sorted and printed in a variety of reports and kept as a permanent record of medication usage.

Each station can generate summary reports of all transactions for that station for up to the most recent 32 hours.

To store information electronically, or to generate custom reports, you can archive the console data and import the data into various database and spreadsheet programs. For specific information on archiving, see *Utilities* on page 135.

System communication

You can implement a communications system to fit your needs and the layout of the facility. The configurable communications feature allows communications via network methods. A CareFusion applications engineer works with you to integrate the Pyxis MedStation system with your telecommunications system.

The required communications links in the Pyxis MedStation system installation include:

- A Pyxis Procar that interfaces the console to the hospital or pharmacy computer for ADT, billing, and patient-profile information.
- A communications component that links the console to the network of stations.

For station communications, network protocols are used. For interface communications, the same options apply, depending on the system-interface method supported by the hospital-system vendor. The preferred method of network communications is Transmissions Control Protocol/Internet Protocol (TCP/IP) over Ethernet.

Interface options

While the Pyxis MedStation system can be operated as a stand-alone turnkey system, significant value and operating efficiencies are added by using various interfaces with your hospital- and pharmacy-information systems. CareFusion will collaborate with any hospital-information system vendor to complete these interfaces.

There are five basic interface options:

- **ADT interface**—Although ADT information can be manually updated, the volume of information necessitates the use of a real-time electronic interface. The ADT interface between the console, located in the pharmacy, and the hospital's information system is typically a one-way source of information, coming from one of several potential ADT sources. These sources include a printer “splice” interface into an existing line from your information system to your pharmacy printer, or any of the communications methods discussed in *System communication* on page 8. The console receives ADT information, routing it to the appropriate stations.
- **Billing interface**—A billing interface eliminates the need to enter individual billing transactions manually into the billing system. CareFusion can create an interface that allows you to format and send these transactions directly to your billing system.
- **Pharmacy-profile interface**—the Pyxis MedStation system offers an interface to the pharmacy computer system, which gives providers immediate point-of-use access to patients' medications via their medication profiles, while saving a number of dispensing steps for the pharmacy. Upon medication removal, information regarding usage and inventory is automatically routed back to the pharmacy system. This interface can also include real-time

formulary and stock-location updates between the pharmacy system and the Pyxis MedStation system.

- **Medication-charting interface**—As medications are withdrawn from stations, all information routinely required for the medication-administration record is passively collected. The Pyxis MedStation system has the ability to pass this information electronically to automated nurse-charting systems. Additional data fields in the Remove and Return processes collect information such as injection sites, observations, and other medication- and station-specific data. Configure the information to meet your nurse-charting vendor specifications.
- **Wholesaler interface**—CareFusion has the ability to pass medication usage information directly to your wholesaler. A separate computer connected to the console interfaces with the wholesaler's computer. More information regarding the wholesaler interface is available from your CareFusion representative and your wholesaler.

Chapter 2

Console Basics

This section includes the following topics:

<i>Getting started</i>	12
<i>Using the console</i>	14

Getting started

This section provides an overview of how to access the console user interface.

NOTE

The examples used throughout this guide show screens with full access privileges and most station options turned on. The screens you see on your system might vary depending on your access privileges and option settings.

NOTE

If your facility decides to use the SHA1 password encryption, do not turn on this flag until this feature is implemented on all devices connected to the console.

Navigating the standby screen

The standby screen box is the default console screen and is your entry point into the console. After a predetermined time without keyboard activity, the console reverts to the standby screen even if you have not logged out. However, you should always log off when you leave the console to ensure that transactions are not performed by other users using your logon ID.

Logging in

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.

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



The menu bar appears.

NOTE

The console should not allow ID scans.

Logging off


Log off before stepping away from the console.

- In the menu bar, click **Logoff**.
The standby screen appears.

Changing your password

Before you can access the console, you must have a password. Your system administrator assigns a temporary password to you.

1. In the menu bar, click **Change Password**.
2. In the Change Password dialog box, enter your current password and your new password.



The image shows a 'Change Password' dialog box. At the top, it says 'Change Password'. Below that, it says 'For user : USER, DEMO'. There are three input fields: 'Enter current password:', 'Enter new password:', and 'Re-enter new password:'. At the bottom, there are two buttons: 'OK' and 'Close'.

3. In the **Re-enter new password** box, enter your new password again.
4. To save the new password, click **OK**.

Using the console

This section includes information on the menu bar and features and functions.

NOTE

In some of the dialog boxes that you will encounter throughout the product, yellow is used to highlight fields that you are required to complete.

Menu bar

After logging on to the console, a menu bar appears. The menu bar provides access to all the functions available to you, based on your user access privilege level. Functions are grouped into the following menu categories:

- **Inventory**—Assign medications to station pockets, replace medications or assign more medications to pocket, or make pockets unavailable.
- **Reports**—Access Inventory reports, Activity reports, System Activity reports, and System reports. The Reports option also allows you to view the print queue and to add to or edit the list of batch reports.
- **System Setup**—Customize your system site information and selections lists, and define all system components such as devices, formulary, users, patients, and areas.
- **Utilities**—Globally edit your formulary, devices, and users, and archive data.
- **Change Password**—Change your password.
- **Window**—Turn display of the Attention Notices pane and XQ Viewer pane on and off. Do not leave the XQ Viewer open—use only as a support tool.
- **Help**—Access Online Help to get information about the console.
- **CommStatus**—View the communication status between all non-console devices including stations and Procars.
- **Logoff**—Log off the console. To prevent unauthorized use of the system, use Logoff whenever you step away from the console.

Features and functions

The console uses standard features and functions found on most devices. However, you may not be familiar with Quick Keys. Those are explained below.

Quick key

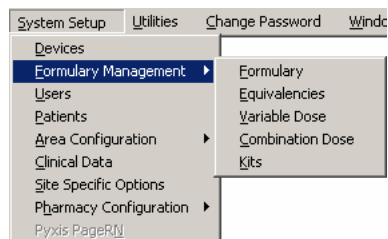
In addition to accessing menus using the mouse, you can use quick keys to access menus, menu options, and onscreen buttons. This involves using the Alt key, the first letter of the menu name, followed by the first letter of the menu option (or whichever letter in the name that is underlined).

To display quick keys

- To toggle the display of quick keys (that is, to hide or show the underlined letters), press ALT.

To use a quick key

1. While holding down ALT, enter the underlined letter of the applicable item.



2. To select an option from the open menu, release ALT, and enter the underlined letter of the desired option.

NOTE

You can also activate on-screen buttons using quick keys in the same way. Hold down ALT and enter the on-screen button's underlined character. For example, to activate a Save button, you would hold down ALT and press S.

Chapter 3

Setting Up the System

When you configure the Pyxis MedStation system, you enter information unique to your facility, such as station names, users, patients, and formulary. This section includes the following topics:

<i>Devices</i>	18
<i>Formulary management</i>	38
<i>Formulary equivalencies</i>	49
<i>Variable dose</i>	53
<i>Combination dose</i>	57
<i>Kits</i>	62
<i>Users</i>	66
<i>Patients</i>	79
<i>Areas</i>	92
<i>Clinical data</i>	96
<i>Site-specific options</i>	106
<i>Pharmacy configuration</i>	117
<i>Maintaining scan codes</i>	125
<i>Communication status</i>	130

Devices

Devices are components that work as part of the Pyxis MedStation system and can include the stations in your facility, Pyxis® Anesthesia System, and Pyxis Procar.

Because needs and processes might vary from one nursing unit to another, involve the nursing staff for each nursing unit when setting device options.

NOTE

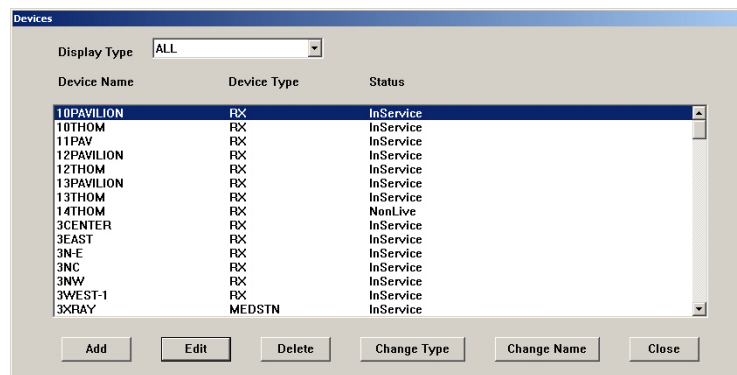
You can update information globally. For more information, see *Updating information globally on page 139*.

Accessing the devices list

The following procedure explains how to view the list of devices in your facility.

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

The Devices dialog box appears.



This dialog box includes the following options:

- **Add**—Adds a station (or other device) to the system.
- **Edit**—Updates an existing device.
- **Delete**—Deletes a device.
- **Change Type**—Changes the Device Type from non-profile to profile.
- **Change Name**—Changes the name of the device (use with caution).

CAUTION

Do not change the station name unless absolutely necessary. Changing the name deletes unresolved discrepancies if you do not resolve them first.

- **Close**—Dismisses the dialog box.
2. To return to the starting page, click **Close**.

Adding a station or other device

To add a new station or other device to the system, complete the steps outlined in the following topics.

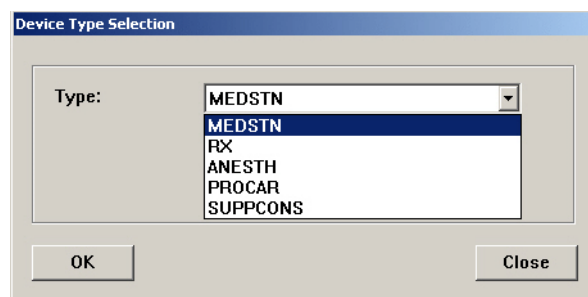
Beginning the process

The following procedure explains how to start the process of adding a new station or other device to the system.

1. Select **System Setup > Devices**.
2. In the Devices dialog box, click **Add**.
3. In the Device Type Selection dialog box, select the type.

The options are:

- **MEDSTN**—A station operating in non-profile mode.
- **RX**—A station operating in profile (Rx) mode.
- **ANESTH**—An Pyxis Anesthesia System station. Requires the assistance of a CareFusion representative.
- **PROCAR**—A computer that facilitates communications between the console and the facility's information system for ADT, medication inventory usage, and patient clinical orders (when in profile mode).
- **SUPPCONS**—A supply console. Customers with Duostation will need to configure this device type to facilitate synchronization of users.



4. Click **OK**.

The Adding New Device dialog box appears.

5. Complete the steps outlined in the next section, *Entering the general settings*.

Entering the general settings

This section describes how to complete the information in the Settings tab.

- These sections appear at the top of the dialog box but only the name information can be entered:
 - Name**—Enter up to 10 alphanumeric characters for the name. The name of the nursing unit is commonly used.
 - 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 MedStation console software. A CareFusion representative might ask for the build number when assisting you with your system.
 - Type**—Displays the type of device.
- Enter the following information in the top section of the settings tab:
 - Facility**—Select the facility with which the station is associated. This field is used primarily by facilities with affiliations or those that have merged and are made up of more than one hospital or nursing home.

- **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.
 - **Zone**—Enter a code that relates to a specific region of the facility, 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**—Select the setting that controls how long the station remains accessible from the Pick a Med or Pick a Patient dialog box 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. (This option appears after you save the current information.)
 - **Brain Transplant**—Restores a station's database from an error condition, such as a corrupted file, which prevents the station from operating correctly. (This option appears after you save the current information.)
3. 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. This option works in conjunction with the Anchor Page option.
 - **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. Depending on the location, security, and intended use for this station, you might want to make the timeout duration short (30 seconds) or long (5 minutes).
 - **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. This ensures that care providers can access a patient's medications for some time after the discharge is processed in the ADT system.
 - **Tx Hold Time**—Enter the number of hours (1–32) transaction information is held at the station to appear on station reports. After the specified period of time, transaction information is purged from the station: all transaction information is always sent to and maintained by the console for up to 31 days.
 - **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. (Does not apply to permanent patients.)
 - **Temp/Activated User**—Enter the number of hours (0 to 99) temporary users remain active after they created at the station. This feature is used for users for areas other than their primary areas. To allow time for shift changes, enter a value that is slightly longer than the longest shift on the unit.
 - **DB Maintenance at**—Checks for expired users and deletes them. Checks for discharged patients and deletes them. This is set at Site Specific Options at the Maintenance tab.
 - **Pre-Admit Lead Time**—Allows Pyxis MedStation system transactions for patients that are in the facility’s HIS system before they arrive at the unit.
4. In the Print Slips For section, select the check boxes for the applicable options:
 - **Remove**—Prints slips when medications are removed.
 - **Load/Unload**—Prints slips when medications are loaded or unloaded.
 - **Refill**—Prints slips when medications are refilled, select this option.
 - **Inventory**—Prints slips when medications are inventoried.
 - **Return**—Prints slips when medications are returned.
 - **Waste**—Prints slips when medications are wasted.
 - **Outdate Removal**—Prints slips when medications are outdated upon removal.
 5. 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.
 6. 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.
 7. 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. Prompts you to enter the appropriate expiration date for the pocket when refilling the medication. Later, when you remove the medication, the station then determines whether the outdate time for the pocket is within the current month. If so, a message warns you to verify the expiration date on the medication being administered, because the pocket might contain outdated medications. During a Refill and Load, the medications being added to the station

affect the expiration date, the system prompts you to change the expiration date.

- **Return to Stock**—Allows users to return unused medications in their original, unopened packages to the drawer and pocket from which they were removed. When disabled, return items to the Return Bin. Use the Formulary menu at the console to assign individual medications the Return to Stock option.
- **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. This information displays only if your facility ADT interface provides allergy information.
- **Waste While Removing**—Wastes during the remove process. Prompts you to confirm whether to administer the full amount.
- **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. If all ADT information is sent to this station, select this option. Application of this feature might be limited to certain areas, such as an OR or post-anesthesia care unit (PACU).
- **Display Last Access**—Transmits throughout the Pyxis MedStation system to all stations where the patient name is listed. For best performance, stations that receive all ADT should have Display Last Access turned off.
- **Remove Warning**—Displays a dialog box 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.
- **Stock Out Bulletins**—Allows you to select or deselect the Stock Out Bulletin and configure the print destination as needed. The Stock Out Bulletins option is selected by default when enabled in site options and displays the default destination defined in Site Options. The dropdown box allows a different printer destination to be chosen.
- **Stock Critical Low Bulletins**—Allows you to select or deselect the Stock Critical Low Bulletin and configure the print destination as needed. The Stock Critical Low Bulletins option is selected by default when enabled in site options and displays the default destination defined in Site Options. The dropdown box allows a different printer destination to be chosen.

- Complete the steps outlined in the next section, *Entering the communication settings*.

Entering the communication settings

This section describes how to complete the Comm tab.

- Click the **Comm** tab.

The screenshot shows the 'Adding New Device' dialog box with the 'Comm' tab selected. The 'Name' field is empty. The 'Status' is 'NonLive' and the 'Type' is 'MEDSTN'. The 'Build #' field is empty. The 'Comm' tab is active, showing a 'Method' dropdown menu. Below it are three 'Token' input fields. At the bottom of the dialog, there is a 'Polling' checkbox and three time input fields: 'Poll Data' (02:00), 'Poll Fail' (01:00), and 'Poll No Data' (04:00). The 'Save' and 'Close' buttons are at the bottom.

- In the **Method** box, type **XT**.
This indicates the method by which the device communicates with the console.
- 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.
- 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.

If this station has no transactions, the console passes information to the station and continues querying the next station. This cycle of polling is continuous until you turn it off. Generally, you would not turn off polling unless so advised by a CareFusion representative.

5. To save the information that you have entered up to this point and ensure that you can add drawers when you reach the section on entering hardware-related information, do the following:
 - a. Click **Save**.
 - b. After the confirmation message appears, click **OK**.
 - c. In the Devices dialog box, select the device that you created and click **Edit**.
6. Do one of the following:
 - If the selected station is being used in profile mode, complete the steps outlined in the next section, *Entering the settings for profile mode*.
 - If the selected station is not being used in profile mode, skip to *Entering the hardware settings* on page 27.

Entering the settings for profile mode

This section describes how to complete the Rx tab, which appears only on stations in profile mode.

1. Click the **Rx** tab.

The screenshot shows the 'Adding New Device' dialog box with the 'Rx' tab selected. The dialog has a title bar and a status bar. The main area is divided into several sections:

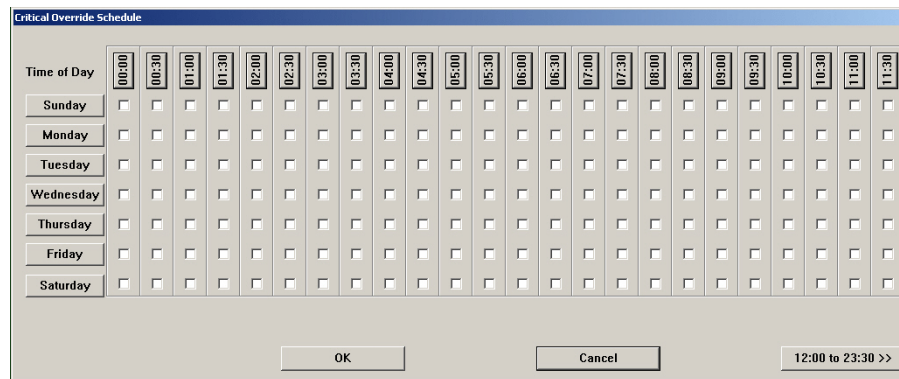
- Name:** [Empty text box]
- Status:** NonLive
- Type:** RX
- Build #:** [Empty text box]
- Settings | Comm | Rx | Hardware | Clin. Data | Adv Comm | Station Privileges | Med Privileges** (Tabs)
- Critical Override**
 - Current Status:
 - Manual Enable
 - Manual Enable on Downtime or delay time. [00:00] HH:MM
 - Use Schedule
 - [View/Edit Schedule...]
 - Interface Status Banners
 - Due Time On Remove
 - Show Patient Summary
- Override Groups**
 - (1) GENERAL
 - (2) ICU
 - (3) TELE
 - (4) NEURO
 - (5) ALL MEDS
- Temporary Non-Rx Mode**
 - Enable
- Order Lead Time:** [3] HH
- Order Lag Time:** [2] HH
- Charting On Remove
- Meds Due Reminder

At the bottom of the dialog are 'Save' and 'Close' buttons.

2. 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. If you are not using the Manual Enable on Downtime or delay time feature, select this option as part of your backup procedure in the event that the profile system is down or behind for an extended period. This option automatically enables critical override

immediately. The next option is not available until a predetermined time has passed.

- **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. Enter the number of hours and minutes after which the profile interface is down or delayed that the station automatically goes into critical override.
- **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 dialog box, select the applicable options and click **OK**. For example, schedule the station for critical override when the pharmacy is closed.



3. In the Override Groups section, select the check boxes for the applicable options.

To override a patient’s profile at this station, select at least one of these override groups. This group must match the override group of your formulary item and pocket.

4. 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. (This applies to new orders.)
 - **Order Lag Time**—Enter the number of hours *after* the stop time that an order remains active at the station. (This applies to discontinued orders.)
5. If you are planning to enable profile mode at the station in the near future, but you currently want the station to receive orders but not display them, select the **Enable** check box in the Temporary Non-RX Mode section.

Until you clear this check box, the station behaves like a standard station (that is, no profile feature), giving you access to all medications at the station.

6. 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. Removal time is the administration time.
 - **Meds Due Reminder**—Select to be reminded when medications are due.
7. Complete the steps outlined in the next section, *Entering the hardware settings*.

Entering the hardware settings

This section describes how to complete the Hardware tab.

1. Click the **Hardware** tab.

The screenshot shows the 'Adding New Device' dialog box with the 'Hardware' tab selected. The dialog has a title bar 'Adding New Device' and a status bar 'Status: NonLive Type: RX Build #:'. Below the title bar are tabs: Settings, Comm, Rx, Hardware (selected), Clin. Data, Adv Comm, Station Privileges, and Med Privileges. The main area is divided into two sections: 'Chassis - Configuration' and 'Drawers - Configuration'. The 'Chassis - Configuration' section has two input fields: 'Chassis Type' and 'Serial #'. The 'Drawers - Configuration' section has a table with columns: Drawer, Subdrawer, Drawer type, MedCart#, Pockets, Addr, and Status. Below the table is a 'Return Bin:' label and three buttons: 'Add', 'Edit', and 'Delete'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

2. Click **Add**.
3. In the Add new Drawer for device dialog box, enter the applicable information.

The screenshot shows the 'Add new Drawer for device MS4000E' dialog box. It has a title bar 'Add new Drawer for device MS4000E' and a status bar 'Status: OK'. The dialog is divided into two columns of input fields: 'Drawer #' and 'Subdrawer #' (text boxes), 'Drawer Type' (dropdown menu), and 'Num of Pkts' (text box) in the top row; 'Address' and 'MedCart #' (text boxes) in the middle row. At the bottom are 'Save' and 'Close' buttons.

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

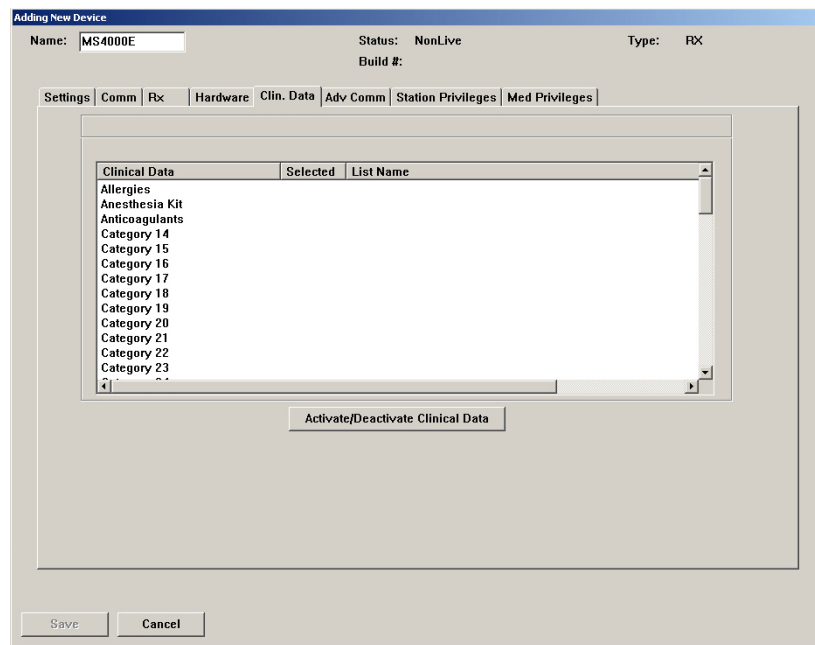
- **Drawer Type**—Select the drawer type from the drop-down list. Drawer types include bin, matrix, mini, remote stock, and shelf. For more information, see drawer descriptions in the *Glossary*.
 - **Address**—Enter the drawer address (location).
 - **Status**—This box displays the current status of 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.
4. When you are finished, click **Save**.
 5. Complete the steps outlined in the next section, *Activating a CDC*.

Activating a CDC

The Clin. Data tab is where you activate or deactivate clinical data categories (CDCs). You must set up CDCs at the Clinical Data menu so they are available for activation and deactivation at the station. For more information, see *Clinical data* on page 96. You can activate up to 200 CDCs per station. However, a maximum of four categories are allowed per Remove, Return, or Waste transaction for each medication.

1. Click the **Clin. Data** tab.

The Clin. Data tab appears, listing all CDCs that have been defined in Clinical Data.



2. 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.

3. When you are finished, click **Save**.
4. Complete the steps outlined in the next section, *Entering the advanced communication settings*.

Entering the advanced communication settings

Changing the options on the Adv Communications tab affects station communication and message processing.

CAUTION

Contact your CareFusion representative before making changes to these settings. If your site requires more than one computer in your console configuration, a representative might direct you to change the value of the Comm Box field.

The screenshot shows a software window titled "Adding New Device". At the top, it displays "Name: MS4000E", "Status: NonLive", and "Type: RX". Below this is a navigation bar with tabs: "Settings", "Comm", "Rx", "Hardware", "Clin. Data", "Adv Comm", "Station Privileges", and "Med Privileges". The "Comm" tab is currently selected. In the center, a box contains a warning: "**** CAUTION: **** These values should only be modified under very rare circumstances!!!". Below the warning are four fields: "Device Queue Name" with the value "MS4000E", "Protocol Name" with the value "console", "PComm Name" with the value "PComm", and "Comm Box" with a dropdown menu showing "4KCONS". At the bottom of the window are "Save" and "Cancel" buttons.

To continue the setup process

- Complete the steps outlined in the next section, *Entering station privileges for temporary users*.

Entering station privileges for temporary users

This section describes how to complete the Station Privileges tab. Station privileges are those associated with the temporary users that are added at the station.

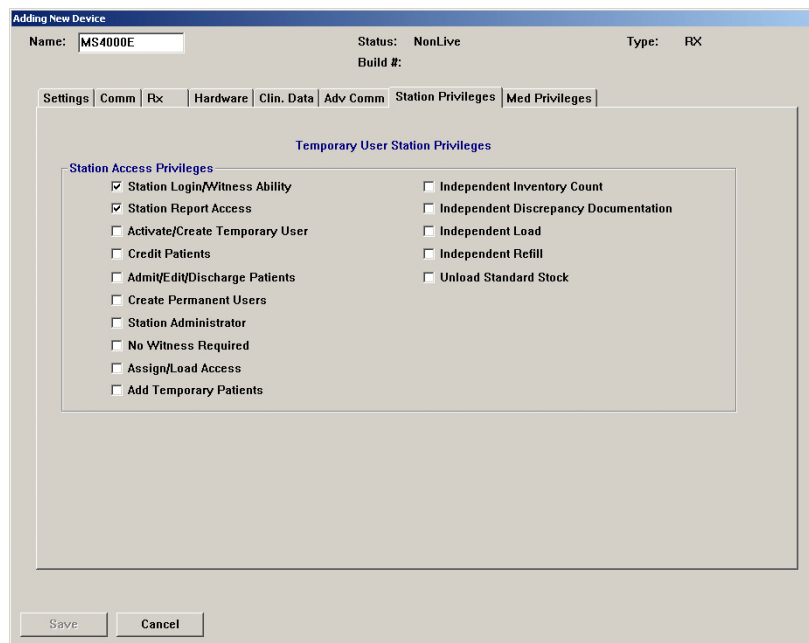
The following table provides examples of users and some of the privileges they might need:

Enable This Privilege	For
Station Login/Witness Ability	Users who can act as witnesses to the following procedures, but who do not have the authority to perform them: <ul style="list-style-type: none"> • Wasting a medication. • Returning an item. • Completing an inventory. • Documenting a discrepancy. • Recovering a drawer. • Emptying the Return Bin. • Print reports of their own transactions.
Activate/Create Temporary User	Charge nurses or other users who can grant another user temporary access to a station.
Admit/Edit/Discharge Patients	Users who: <ul style="list-style-type: none"> • Reconcile patients at the station. • Update patient information. • Add patients to the census that are not usually entered through the facility patient admitting system. (In most cases, ADT information is managed through the hospital/Pyxis MedStation system electronic interface between the facility's system and the Pyxis MedStation system.)
Station Administrator	Users who: <ul style="list-style-type: none"> • Have completed the Pyxis MedStation system Manager training. • Are responsible for off-hours troubleshooting support of the station, such as a third-shift pharmacist or nursing supervisor.

Each station privilege has unique properties. All are mutually exclusive, with the exception of the Station Login/Witness Ability privilege. If you are given any privilege other than this one, you automatically gets the Station Login/Witness Ability privilege. Otherwise, assign each privilege individually.

To set the privileges for a station

1. Click the **Station Privileges** tab.



2. Select the applicable options:
 - **Station Login/Witness Ability**—Allows limited access to the station with no ability to access drawers. Gives you this level of access to allow you to act as witnesses. You can change your password and print your activity transactions with this access.
 - **Station Report Access**—Allows you run any report at the station. You can run reports that are limited to your own activities and discrepancies at that station with this privilege.
 - **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. A temporary user has access for up to 99 hours, depending on the time period defined on the Settings tab. For more information, see *Entering the general settings* on page 20.
 - **Credit Patients**—Lets you credit a patient when wasting a complete dose of a medication. This situation might arise if a medication package is damaged or contaminated. Give patients a starting credit of 0.
 - **Admit/Edit/Discharge Patients**—Lets you admit, update, or discharge patients at the station. You have a Patients button in the Main Menu at the station that permits access to this feature with this privilege.
 - **Create Permanent Users**—Lets you create permanent users at the station. Differs from the Activate/Create Temporary User privilege in that permanent users do not have a time limit. Permanent users are allowed to assign any station or medication privilege that they themselves have to users they create. With this privilege, you automatically have both the

Station/Login Witness Ability and the Activate/Create Temporary User privilege.

- **Station Administrator**—Lets you perform initial setup and ongoing troubleshooting of the station. Allows you to add, modify, and delete devices, which includes changing the drawer style and number of pockets, shutting down the station, placing the station in or out of service, altering communications, calibrating the touch dialog box, and transplanting data. At stations running in profile mode, you can enable and disable critical override.
 - **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. This option does not apply to MiniDrawers.
 - **Add Temporary Patients**—Lets you add temporary patients at the station.
 - **Independent Inventory Count**—Lets you inventory medications without a witness. You can recover a failed drawer and conduct the subsequent inventory of that drawer without a witness, assuming you have access to all medication security groups of the medications in that drawer.
 - **Independent Discrepancy Documentation**—Lets you document discrepancies at the station without a witness. Otherwise, all discrepancy resolutions require a witness. You must have access to the discrepancy medication's security group to document the discrepancy.
 - **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. You must confirm before proceeding. You cannot unload medications without this privilege unless you clear the Standard Stock setting in Inventory.
3. When you are finished, click **Save**.
 4. Complete the steps outlined in the next section, *Entering medication privileges for temporary users*.

Entering medication privileges for temporary users

Medication privileges are associated with temporary users that are added at a station. When you set up your formulary, you specified a security group for each medication. Temporary user medication privileges are based on the security group of the medication.

1. Click the **Med Privileges** tab.

The screenshot shows the 'Adding New Device' dialog box with the 'Med Privileges' tab selected. The 'Name' field contains 'MS4000E', 'Status' is 'NonLive', and 'Type' is 'RX'. The 'Med Privileges' tab is active, displaying a table for 'Temporary User Med Privileges'. The table has columns for Security Groups A through J and a 'Select' column. Below the table are sections for 'Security Group Names' and 'Override Groups'.

Security Groups →	Select	A	B	C	D	E	F	G	H	I	J	Select
Remove	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
Inventory	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
Load	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
Unload	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
Refill	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
RxCheck	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All

Security Group Names

- A: Misc. controlled
- B: Controlled C-II
- C: Controlled C-III
- D: Controlled C-IV-V
- E: Non-controlled
- F: RESPIRATORY MEDS
- G: ENDOSCOPY NURSES
- H: Supplies
- I: AS-1
- J: AS-2

Override Groups

- (1) GENERAL
- (2) ICU
- (3) TELE
- (4) NEURO
- (5) ALL MEDS

NOTE

The Pyxis MedStation system provides 10 default security group names (A-J). Groups I and J are used with Pyxis Anesthesia System. To rename groups at the console, select System Setup > Pharmacy Configuration > Security Group Names.

2. In the Temporary Med User Privileges section, select the groups to which temporary users can have access at the station.

Users can access override medications whose formulary items and pockets have the same override group as you select here. If you do not activate any override groups, temporary users are unable to access override medications.

 - To select all groups, click **All**.
 - To clear all security groups for a particular function, click **None**.
3. Complete the steps outlined in the next section, *Completing the process*.

Completing the process

The following procedure explains how to finish adding a station or other device.

1. After you are finished entering the information on the various tabs, click **Save**.
2. In the confirmation message that appears, click **OK**.

Editing a station or other device

This section describes how to update units by using the Editing Device dialog box. The contents of this dialog box can vary based on the type of device you are updating. For information about updating devices globally, see *Updating device information globally* on page 142.

1. Select **System Setup > Devices**.
2. In the Devices dialog box, select the applicable device and click **Edit**.
The Editing Device dialog box for the selected device appears with the Settings tab selected.
3. Update the applicable information on each tab.
For information on the tabs and their options, use the information provided in *Adding a station or other device* on page 19.
4. Click **Save**.
5. In the confirmation dialog box that appears, click **OK** to continue.
6. To return to the standby dialog box, click **Close**.

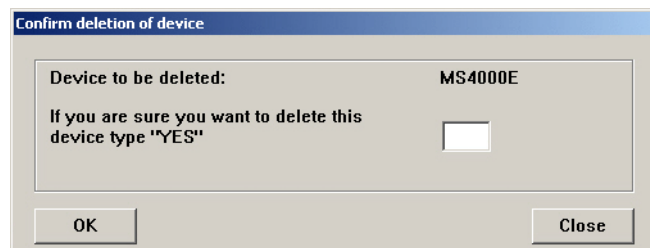
Deleting a station or other device

The following procedure explains how to delete a station or other device from the system.

CAUTION

Use caution when deleting a device. You will lose all configuration information for that device when it is deleted. This information cannot be recovered.

1. Make sure that you run all applicable reports for the device that you intend to delete.
2. Select **System Setup > Devices**.
3. In the Devices dialog box, select the device name and click **Delete**.
4. In the confirmation dialog box that appears, type **yes** in the box and click **OK** to continue.



5. After the confirmation message appears, click **OK**.
6. In the Devices dialog box, click **Close**.

Changing the device type

The following procedure explains how to change the Device Type, which is commonly used to change a station to profile (Rx) mode. The current Device Type determines what options are available to you for changes (for example, if the type is currently RX, the system displays MEDSTN and ANESTH as options).

1. Select **System Setup > Devices**.
2. In the Devices dialog box, select the device and click **Change Type**.
3. In the Device Type Selection dialog box, select the applicable **Type** and click **OK**.
4. In the confirmation message, click **YES** to continue.

The Devices dialog box appears.

Changing the name of a device

The following procedure explains how to change the name of a station or other device.

1. If you are changing the name of a station, resolve all discrepancies before continuing.

CAUTION

Do not change the station name unless absolutely necessary. Changing the name deletes unresolved discrepancies if you do not resolve them first.

2. Select **System Setup > Devices**.
3. In the Devices dialog box, select the device and click **Change Name**.

CAUTION

When changing the name of a device be sure there are no spaces in the name (the name must be all one word) or the name change will fail and could lead to a loss of data.

4. When the confirmation message appears, click **Yes** to continue.
5. In the Devices dialog box, select the device name to change and click **Change Name**.

NOTE

The console does not support device names greater than 10 characters in length. Therefore, enter a new name with 10 or less characters.

6. When the confirmation message appears, click **YES** to continue.
7. In the Device New Name dialog box, enter the new name and click **Save**.
8. When the confirmation message appears, click **OK**.

Taking a device in or out of service

The following procedure explains how to take a station out of service or put it back in service. If you take a device out of service, all communication between the console and the device is stopped after the device is out of service.

1. Select **System Setup > Devices**.
2. In the Devices dialog box, select the device whose status you want to change and click **Edit**.

NOTE

Take a station in or out of service only under the direction of a CareFusion representative.

3. In the lower-right corner of the Editing Device dialog box, click **In Service/Out of Service**.
4. When the confirmation message appears, click **Yes** to continue.
5. If the devices in service, a message appears asking “Are you sure you want to change the device status to Out of Service?”
If the device is out of service, the popup message asks “Are you sure you want to change the device status to In Service?”
6. Click **Yes** to continue.
7. On the Devices dialog box, the Status column indicates a pending status and then a final status within 10 seconds of clicking the **In Service** or **Out of Service** button.
If the device was in service, the Status changes to **PendingOutOfSvs**. If the device was out of service, the Status changes to **PendingInSvs**.
8. When the confirmation message appears, click **OK**.

Formulary management

Use the Formulary option to enter and update your facility's formulary. The console also allows you to define degrees of control over the security and clinical data associated with each formulary item.

There are two methods for adding formulary items: manually at the console (for a small number of items) and downloaded via a computer interface from your pharmacy computer system.

NOTE

You can update information globally. For more information, see *Updating information globally* on page 139.

Remove Warning overview

There are two device settings that affect Remove Warning. The first is the Remove Warning check box on the Settings tab (this directly affects the Too Close warning, which is for both profile and non-profile mode). The second is the Due Time On Remove check box on the Rx tab. Due Time On Remove gives the dosing times for profile orders.

The Too Early and Too Late warnings are then derived by comparing the following:

- The current time.
- The three offsets in Default Remove/Admin. +/- Times.
- The list of eligible items in the list as determined by the rules that govern due times.

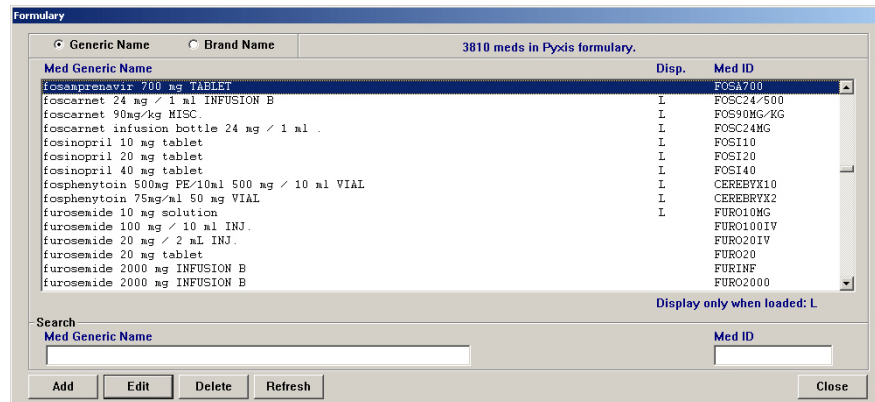
If Remove Warning is turned on and Due Time On Remove is turned off, you get the Too Close warning when the medication currently being removed has been previously removed within the parameter set at the console. Likewise, if Remove Warning is turned on and the device is in non-profile mode, you also get the Too Close warning.

Accessing the formulary list

The following procedure explains how to view the list of formulary items.

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

The Formulary dialog box appears, displaying all medications in the formulary. The list is displayed in alphabetical order based on the generic name.



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. As you type, the system attempts to match the item character by character to your entry.
 - **Med Brand Name**—When viewing medications by Brand Name, begin typing the brand name of the item for which you are searching. As you type, the system attempts to match the item character by character to your entry.
 - **Med ID**—Begin typing the medication ID (medication ID) of the item for which you are searching. As you type, the system attempts to match the item character by character to your entry.
 - **Refresh**—Click to refresh the contents of the list.
3. To return to the standby dialog box, click **Close**.

Adding a formulary item

This section describes how to add a formulary item.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, click **Add**.

The New Formulary Setup dialog box appears with the Formulary Data tab selected. The fields at the top of the dialog box remain visible regardless of the current tab.

3. In the upper section of the dialog box, 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 medication ID (up to 15 characters).
 - **Alternate ID**—If required by your site, enter a 15-character alternate ID for the medication.

NOTE

Enter data on all tabs before saving unless you plan to edit your formulary globally after entering it. If you save before you are finished, use the Edit button on the Formulary dialog box to continue entering information.

4. Complete the applicable fields:
 - **Strength**—Describe the amount of the medication per unit. You can enter up to three decimal places (for example, 0.125).
 - **Strength Units**—Select a unit of strength.
 - **Volume**—Enter the fluid volume of the medication. This field is required only when the medication is a fluid.
 - **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. One such classification system has been published by the American Hospital Formulary Service (AHFS).
- **Med Class**—Select the medication classification (medication class). The class is used for sorting of medications in reports.
- **Pick Area**—Select the pharmacy location where the medication is stored for station replenishment. Required for use with the Pyxis PAR_x[®] pharmacy auto-replenishment system. If using Pyxis PAR_x, configure the system so that medications must be scanned. You can scan for load and refill processes only. Configure your device for scanning.
- **Manufacturer**—Select the manufacturer of the medication.
- **Alternate ID 2**—Enter a 22-character, alphanumeric medication ID that functions as an additional identification for the medication.
- **Security Group**—Select the security group. The security group determines if you can access this medication. For you to have access to a medication, your security group must match the medication's 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. You can also select With Blind Count ON, which asks how many medications are in the pocket, or At/Below Min to require a medication count when the inventory level reaches the minimum specified for the loaded.
 Enable Blind Count at the device to use the Blind Count option when a medication is removed. Quantities are not displayed, as recorded in the database, when the user performs a count verification before removing items.
- **Override Group** (profile mode only)—Enter the override group to which this medication is assigned. Only users assigned the same override group can access this medication.
- **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.

- Click the **Formulary Options** tab.

The screenshot shows the 'New Formulary Setup' dialog box with the 'Formulary Options' tab selected. The 'Generic Name' and 'ID' fields are highlighted in yellow. The 'Formulary Options' section includes several sub-sections: 'Med Options' with checkboxes for 'Return to Stock', 'Waste While Removing', 'Requires Rx Check', 'Volume Calculation', 'Scan Once on Remove', 'Scan on Remove', 'Scan on Load/Refill', and 'Undocumented Waste'; 'Auto-Resolve Discrepancy Options' with 'Load Discrepancies' and 'All Except Load Discrepancies' checked; 'Display options' set to 'Only When Loaded' and 'Print option' checked; 'PPARx Scanning Configuration' with 'During Pick' and 'During Check' unchecked; 'Witness Required To' with 'Remove' and 'Override' unchecked; and 'Custom Bulletins Setup' with 'Stock Out Bulletins' and 'Stock Critical Low Bulletins' checked, and 'Stock Critical Low %' set to 20. At the bottom are 'Save', 'Close', and 'Delete' buttons.

- 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. This is a tool for auditing the refill and load processes. An icon also appears to warn the nurse that a medication is being removed before the pharmacist check takes place.
- **Volume Calculation**—Allows users to calculate the volume of a medication needed for the ordered dose. Enter the strength and volume units in the formulary data field to make this option available.
- **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. The load discrepancy appears on the Discrepancy report as closed (documented).
- **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. The discrepancy appears on the Discrepancy report as closed (documented).

- **Display options** (profile mode only)
 - Displays the medication in the medication profile list at the station regardless of whether it is loaded, select **Always**. (It is also eligible to appear on the Ordered Meds Not Loaded report.)
 - To display the medication on the station profile list only when it is loaded, select **Only When Loaded** (This also renders the item ineligible for display on the Ordered Meds Not Loaded report.)
 - **Print option**—Prints the medication on Ordered Meds Not Loaded bulletins and reports, as necessary. This eliminates the printing of medications that are displayed in the patient profile, but not loaded in the station. When selected, the medication is not printed on bulletins.
7. Select or deselect the **Stock Out Bulletins**, **Stock Critical Low Bulletins**, and **Stock Critical Low %** check boxes as needed.
 - **Stock Out Bulletins** is selected by default when enabled in site options.
 - **Stock Critical Low Bulletin** is selected by default when enabled in site options. When checked, the **Stock Critical Low %** field is also enabled.
 - **Stock Critical Low %** formulary item value supersedes the site's Stock Critical Low % value.
 8. 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. If the medication is removed prior to this timeframe, the system displays the Too Early warning at the station and hand-held devices.
 - **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. If the medication is removed after this timeframe, the system displays the Too Late warning at the station and hand-held devices.
 - **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. If the medication is removed during this timeframe, the system displays the Too Close warning at the station and hand-held devices.
 9. 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.

NOTE

The order in which you select the CDCs determines the order in which the clinical data is requested at the station when the medication is removed, returned, or wasted.

The screenshot shows the 'New Formulary Setup' dialog box. It has a title bar and three tabs: 'Formulary Data', 'Formulary Options', and 'Formulary Categories'. The 'Formulary Data' tab is selected. At the top, there are four input fields: 'Generic Name', 'Brand Name', 'ID', and 'Alternate ID'. Below these are three sections of dropdown menus. The first section is 'Remove Clinical Data' with four dropdowns. The second is 'Return Clinical Data' with four dropdowns. The third is 'Waste Clinical Data' with four dropdowns. All dropdowns are currently set to 'No Category'. At the bottom of the dialog are two buttons: 'Save' and 'Close'.

10. Click **Save** and then click **OK**.
11. To return to the Formulary dialog box, click **Close**.

Editing a formulary item

With appropriate user privileges, you can modify formulary items. For information about updating the formulary globally, see *Updating the formulary globally* on page 139.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, select the applicable medication and click **Edit**.
3. In the View/Modify Formulary dialog box, update the applicable information and click **Save**.
4. In the confirmation dialog box that appears, click **OK** to continue.

NOTE

For Pyxis Anesthesia System, all pended items must be loaded prior to performing any edits/global edits on those pended items.

Deleting a formulary item

This section describes how to delete a formulary item.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, select the applicable medication and click **Delete**.
3. In the confirmation message, click **YES**.
4. In the second confirmation message that appears, click **OK**.

Editing accessed inventory

This feature allows you to bypass inventory of those pockets with controlled medications which have not been accessed since the last inventory was performed.

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. See *Adding a medication classification on page 120*.
5. Select **Save** or **Close** as appropriate.

Enabling Scan on Remove

This feature allows a facility to require scanning of a medication scancode during the remove process. This feature is configured in the formulary section. In addition, scancode maintenance must also be performed at the console to correlate a scancode to a specific formulary.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, highlight the medication.
3. Click **Edit**.
The View/Modify Formulary dialog box appears.
4. Click the **Formulary Options** tab.

The screenshot shows the 'View/Modify Formulary' dialog box with the 'Formulary Options' tab selected. The 'Generic Name' and 'Brand Name' are both 'Acetaminophen'. The 'ID' is '66632'. The 'Formulary Options' section includes several checkboxes: 'Return to Stock' (checked), 'Waste While Removing' (checked), 'Requires Rx Check' (checked), 'Volume Calculation' (unchecked), 'Scan Once on Remove' (unchecked), 'Scan on Remove' (unchecked), 'Scan on Load/Refill' (unchecked), and 'Undocumented Waste' (checked). The 'Auto-Resolve Discrepancy Options' section has 'Load Discrepancies' (unchecked) and 'All Except Load Discrepancies' (unchecked). The 'Display options' dropdown is set to 'Always', and 'Print option' is checked. The 'Remove/Admin. +/- Times' section has 'Enter number of minutes in which it is OK to admin a med' (0), 'Before scheduled dose time: [Too Early]' (0), 'After scheduled dose time: [Too Late]' (0), and 'After remove/admin same Med. wait for: [Too Close]' (10). The 'Witness Required To' section has 'Remove' (unchecked) and 'Override' (unchecked). The 'Custom Bulletins Setup' section has 'Stock Out Bulletins' (checked), 'Stock Critical Low Bulletins' (checked), and 'Stock Critical Low %' (100). At the bottom are 'Save', 'Close', and 'Delete' buttons.

5. Check the **Scan on Remove** check box.

NOTE

If processing multi-doses, check the **Scan Once on Remove** box. This option allows you to scan medications once regardless of the quantity being removed. This makes it easier to work with multi-dose orders.

- When removing multiple instances of a formulary item, the station requires one scan the first time the item is removed from the same pocket.
- When removing multiple instances of a formulary item in which the quantity of items in one pocket is smaller than the quantity selected to remove, the station requires that you scan the first item removed from each pocket from which the item is removed.
- With Scan Once enabled, NDC values cannot be captured since each dose is not scanned.

NOTE

When enabling Scan Once, you are prompted to scan the item being removed only once. Information will be provided in the system for the one item you scanned. Scan Once is designed to capture only one scan during medication removal that may involve multiple dosage forms within the same pocket.

6. Click **Save**.
7. Click **OK**.

Enabling Scan on Load/Refill

This feature allows a facility to require scanning of a medication scancode during the load/refill processes. This feature is configured in the formulary section. In addition, scancode maintenance must also be performed at the console to correlate a scancode to a specific formulary.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, highlight the medication.
3. Click **Edit**. The View/Modify Formulary dialog box appears.
4. Click the **Formulary Options** tab.

The screenshot shows the 'View/Modify Formulary' dialog box with the 'Formulary Options' tab selected. The 'Med Options' section contains the following items:

- Return to Stock
- Waste While Removing
- Requires Rx Check
- Volume Calculation
- Scan Once on Remove
- Scan on Remove
- Scan on Load/Refill
- Undocumented Waste

The 'Auto-Resolve Discrepancy Options' section includes:

- Load Discrepancies
- All Except Load Discrepancies
- Display options: Always (dropdown menu)
- Print option

The 'Remove/Admin. +/- Times' section has input fields for:

- Before scheduled dose time: [Too Early] (0)
- After scheduled dose time: [Too Late] (0)
- After remove/admin same Med. wait for: [Too Close] (10)

The 'Witness Required To' section has checkboxes for:

- Remove
- Override

The 'Custom Bulletins Setup' section includes:

- Stock Out Bulletins
- Stock Critical Low Bulletins
- Stock Critical Low %: 100

Buttons at the bottom include Save, Close, and Delete.

5. Select the **Scan on Load/Refill** check box.
6. Click **Save**.
7. Click **OK**.

Enabling undocumented waste

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

In addition, a report detailing all open Undocumented Wastes is available. See *Undocumented Waste* on page 170 for further information.

1. Select **System Setup > Formulary Management > Formulary**.
2. In the Formulary dialog box, highlight the medication.
3. Click **Edit**. The View/Modify Formulary dialog box appears.
4. Click the **Formulary Options** tab.

The screenshot shows the 'View/Modify Formulary' dialog box with the 'Formulary Options' tab selected. The 'Generic Name' is 'oxycodone *SA*' and the 'Brand Name' is 'OXYCONTIN'. The 'ID' is 'OXYC20' and the 'Alternate ID' is '2505581'. The 'Formulary Options' section includes 'Med Options' (Return to Stock, Waste While Removing, Requires Rx Check, Volume Calculation, Scanning Required, Undocumented Waste) and 'Auto-Resolve Discrepancy Options' (Load Discrepancies, All Except Load Discrepancies). The 'Remove/Admin. +/- Times' section includes 'Before scheduled dose time: [Too Early]', 'After scheduled dose time: [Too Late]', and 'After remove/admin same Med, wait for: [Too Close]'. The 'Witness Required To' section includes 'Remove' and 'Override'. The 'Save', 'Cancel', and 'Delete' buttons are at the bottom.

5. Check the **Undocumented Waste** box.
6. Click **Save**.
7. Click **OK**.

Formulary equivalencies

Formulary equivalencies allow a pharmacist to define a certain strength of a formulary item as equivalent to multiples of another strength of the same generic item. Equivalencies allow you to remove a dose for a patient even if the ordered strength is not loaded at the station and eliminate the need to stock a rarely used strength in a specific station or throughout the facility.

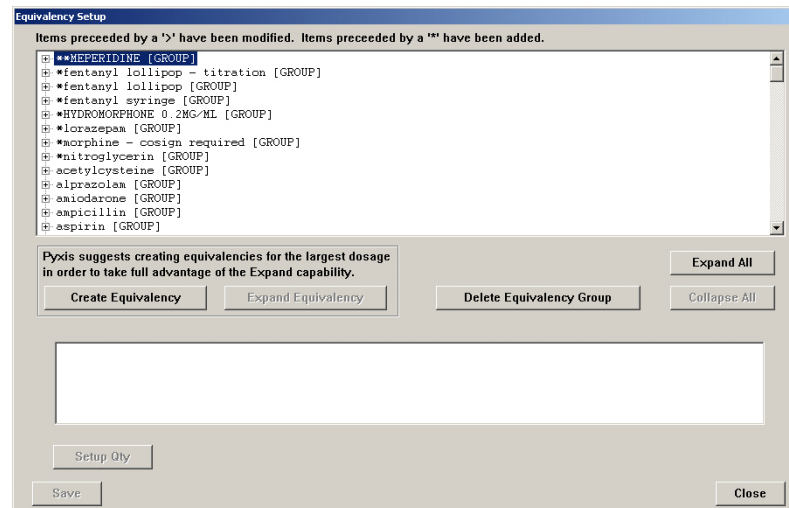
Creating an equivalency

The following rules apply when creating equivalencies:

- Equivalencies are defined as multiple units of the same formulary line item, not as a combination of multiple formulary line items. For example, defining one tablet each of Amitriptyline 25 milligrams (mg) and 50 mg as an equivalency to one tablet of Amitriptyline 75 mg is not allowed. However, three tablets of 25 mg are defined as equivalent to 75 mg.
- Equivalencies are established only between formulary items of the same generic name defined in the console formulary. To define a combination of generically different formulary items, define a combination dose instead of an equivalency.
- Equivalencies might not contain variable-dose or combination-dose members.

To create an equivalency

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup dialog box, click **Create Equivalency**.



3. In the Select med for equivalency creation dialog box, select a medication on which to base your equivalency.

CareFusion suggests creating equivalencies for the medication with the greatest strength to take advantage of the Expand feature.

An equivalency group is created for the item you selected. Candidates for the equivalency (items with the same generic name and unit strength, mg, mEq, and so on) and medication classification appear in the list at the bottom of the dialog box. Generally, equivalent items must have a strength other than zero defined in the formulary to appear as candidates.

4. Click **Select**.
5. In the bottom section of the dialog box, 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**.

After you have created equivalencies, you can view, edit, delete, or expand them as needed.

Viewing an equivalency

This section describes how to view an equivalency.

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup dialog box, click the plus sign for the group whose details that you want to view.

NOTE

Modified items in the list are preceded by a > symbol and added items are preceded by an * symbol for easy identification.

Editing an equivalency

This section describes how to update an equivalency.

NOTE

The Edit Equivalency button only shows when you click on the equivalency. It does not appear when you click the group name or the individual medication.

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup dialog box, select the equivalency that you want to update.

Click **Edit Equivalency**. Equivalencies appear in the bottom section of the dialog box.

3. Select a medication on which to base your equivalency.
4. To create an equivalency, select a medication from the lower listbox.
5. 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.

6. To continue, click **Accept Equivalency**.
7. Click **Save**.

Deleting an equivalency

This section describes how to delete a specific equivalency, an equivalency group, and a medication within an equivalency.

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup dialog box, do one of the following:
 - To delete an individual equivalency, select the equivalency and click **Delete Equivalency**.
 - To delete an equivalency group, select the group and click **Delete Equivalency Group**.

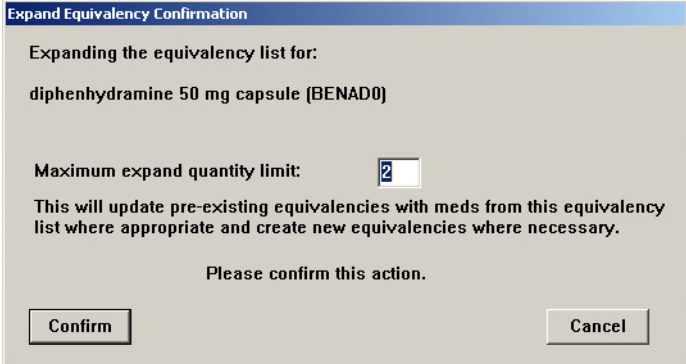
- To delete a medication within an equivalency, select the medication and click **Delete Equivalent Med**.
3. In the confirmation message, click **Confirm**.
 4. Click **Save**.

Expanding an equivalency

The Expand Equivalency feature allows the system to create additional equivalencies between selected items within the same equivalency automatically.

1. Select **System Setup > Formulary Management > Equivalencies**.
2. In the Equivalency Setup dialog box, click the plus sign for the applicable equivalency group.
3. Click **Expand Equivalency**.

An Expand Equivalency Confirmation dialog box appears. The Maximum Expand Quantity Limit default is two.



The dialog box is titled "Expand Equivalency Confirmation". It contains the following text: "Expanding the equivalency list for: diphenhydramine 50 mg capsule (BENADOL)". Below this, there is a label "Maximum expand quantity limit:" followed by a text input field containing the number "2". Underneath the input field, it says "This will update pre-existing equivalencies with meds from this equivalency list where appropriate and create new equivalencies where necessary." At the bottom, it says "Please confirm this action." and has two buttons: "Confirm" and "Cancel".

4. If desired, change the maximum expand quantity limit.
5. Click **Confirm**.
6. Click **Close**.

Variable dose

The Variable Dose feature allows the pharmacist to address the issue of range dosing by defining dosage choices for the care provider based on a single order. To accomplish this, create a formulary line item in both the pharmacy computer system and the console. Using variable-formulary doses creates the formulary line item.

Adding a variable dose

The following rules apply when creating a variable dose:

- The nurse can access the ordered dose if one or more members of the variable dose are available at the station, whether or not all members are present. The station displays a message if any individual members are not available.
- Variable doses cannot contain combination doses as members.
- Variable doses can contain formulary equivalencies if the variable dose contains only one member and an equivalency has been set up for that member.
- For best results, load all members of a variable dose in stations where that medication is used.

To add a variable dose

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

The screenshot shows a window titled "Variable Dosage Meds". Inside, there is a table with two columns: "Variable Dosage Name" and "Med ID". The table contains one row with the values "MORPHINE PARAMETER BOLUS" and "MORPHEBOLUS". Below the table is a search field with the label "Search" and two input boxes. At the bottom of the window are four buttons: "Add", "Edit", "Delete", and "Close".

Variable Dosage Name	Med ID
MORPHINE PARAMETER BOLUS	MORPHEBOLUS

2. In the Variable Dosage Meds dialog box, click **Add**.
The Variable Dosage Med Setup dialog box appears with the Data tab selected.

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 medication ID (up to 15 characters).
 - **Alternate ID**—If required by your site, enter a 15-character alternate ID for the variable dose.

NOTE

The formulary ID is the same in the console as in the pharmacy system.

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 medication 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.

Variable Dosage Med Setup

Generic Name : ID :

Brand Name : Alternate ID :

Data Members

Variable Dose Contents

Candidates for this variable dose med must be selected. To select press:

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

Variable Dose: Candidate Selection

Generic Name Brand Name 3810 meds in Pyxis formulary.

Med Generic Name	Disp.	Med ID
albendazole 200 mg TABLET		ALBE200
albumin 25 % / 50 ml VIAL	L	ALB25
albumin 5 % / 250 ml HED	L	ALBU250
albumin 5 % / 500 ml HED		ALB500
albumin 5% peds MISC.	L	ALBUS45276
ALBUMIN TUBING MISC.	L	ALBTUBING
albuterol 0.083 % / 3 ml SOL	L	VENTSOL
albuterol 17 GM INHALER	L	VENTOLINMD
albuterol 2 mg tablet	L	VENT2
albuterol 4 mg reptabs	L	PROVENT4
albuterol 6.8 GM INHALER	L	ALBUINH
albuterol for reaction prot MISC.	L	ALBRAN
albuterol sulfate 4 mg tablet	L	VENT4
albuterol sulfate inhalation 0.5 % / 20 ml ML(S)	L	ALBUSOLM
albuterol syrup 2 mg / 5 ml SYRUP	L	ALBUSYRP

Display only when loaded: L

Search

Med Generic Name Med ID

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

The screenshot shows the 'Variable Dosage Med Setup' dialog box. At the top, there are input fields for 'Generic Name', 'Brand Name', 'ID', and 'Alternate ID'. Below these are two tabs: 'Data' and 'Members'. The 'Data' tab is selected and contains a 'Variable Dose Contents' list box which is currently empty. Below this list are three buttons: an upward arrow, 'Add', a downward arrow, 'Remove', and 'Select Candidates'. At the bottom of the 'Data' tab is a 'Candidates' list box containing two items: 'albuterol 4 mg reptabs (PROVENT4)' and 'albuterol 2 mg tablet (VENT2)'. At the very bottom of the dialog are 'Save' and 'Cancel' buttons.

12. To save the variable dose definition, click **Save**.
The Variable Dosage Meds dialog box appears.

Editing a variable dose

The following procedure explains how to update a variable dose.

1. Select **System Setup > Formulary Management > Variable Dose**.
2. In the Variable Dosage Meds dialog box, select or search for the item you want to change and then click **Edit**.
3. In the Variable Dosage Med Setup dialog box, make the required changes to the information on the Data and Members tabs, as necessary.
4. Click **Save**.

The Variable Dosage Meds dialog box appears.

Deleting a variable dose

The following procedure explains how to delete a variable dose.

1. Select **System Setup > Formulary Management > Variable Dose**.
2. In the Variable Dosage Meds dialog box, select or search for the item you want to remove and then click **Delete**.
3. In the confirmation message, click **YES**.
4. In the second confirmation message that appears, click **OK**.

The Variable Dosage Meds dialog box appears.

5. To return to the standby dialog box, click **Close**.

Combination dose

Combination doses allow the pharmacist to define cases where more than one item obtained from the station fulfills a single ordered dose. To accomplish this, create a formulary line item in both the pharmacy computer system and the console.

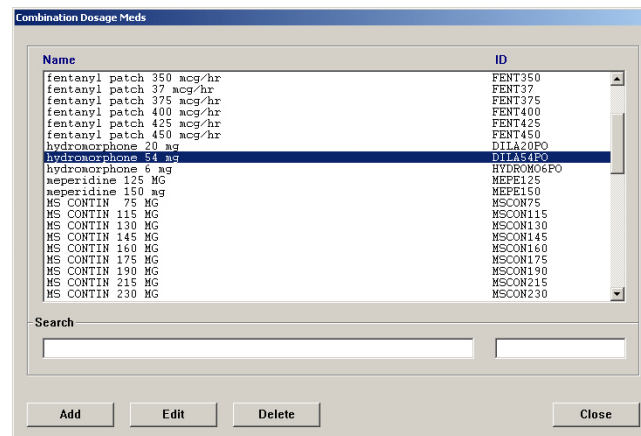
Adding a combination dose

The following rules apply when creating a combination dose:

- All members of a combination dose must be present and available in the station for the nurse to access the dose. Therefore, do not define combination doses that contain members that are not routinely stored in a station.
- Combination doses might not contain formulary equivalency or variable doses as members. Do not use this method for adding formulary equivalencies or variable doses.

To add a combination dose

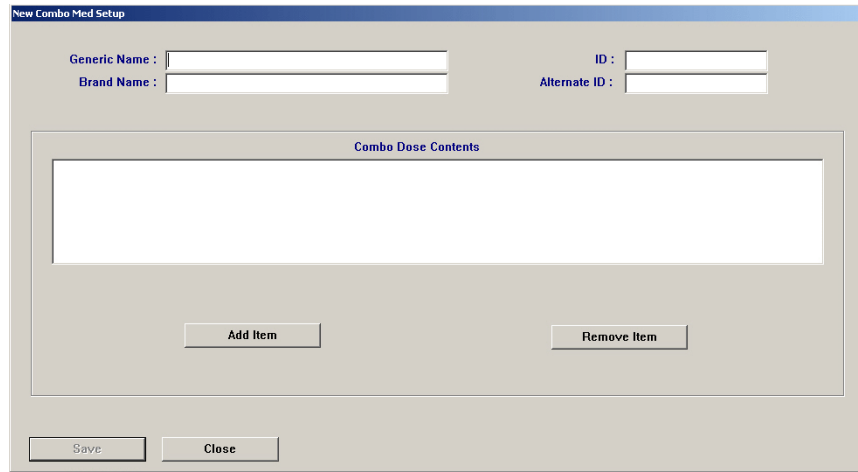
1. Select **System Setup > Formulary Management > Combination Dose**.
2. In the Combination Dosage Meds dialog box, click **Add**.



3. In the New Combo Med Setup dialog box, enter the Generic Name and ID for the combination dose.

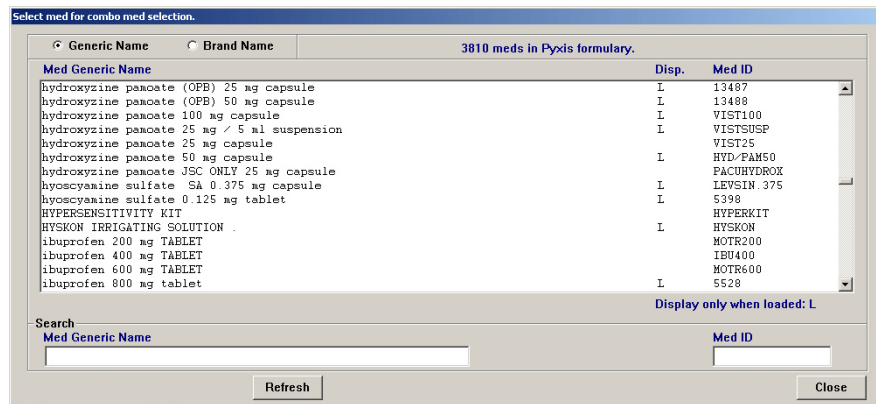
NOTE

The Generic Name and unique ID are required. The Brand Name and Alternate ID are optional.



4. Click **Add Item**.

The Select med for combo med selection dialog box appears.



5. Select or search for the medication to assign to the combination dose and then click **Select**.

- In the Enter Med Quantity dialog box, enter the quantity of the item needed as part of the combination dose and click **OK**.

The New Combo Med Setup dialog box appears with the members in the Combo Dose Contents section.

The screenshot shows the 'New Combo Med Setup' dialog box. It features a title bar and several input fields: 'Generic Name' (containing 'Ibuprofen'), 'Brand Name' (empty), 'ID' (containing '12445'), and 'Alternate ID' (empty). Below these fields is a section titled 'Combo Dose Contents' which contains a list box with one entry: '1 - ibuprofen 800 mg tablet (5528)'. Underneath the list box are two buttons: 'Add Item' and 'Remove Item'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

- If you need to change the quantity of a member, select the member and click **Edit Quantity**.
- Click **Save**.
- In the confirmation message, click **OK**.

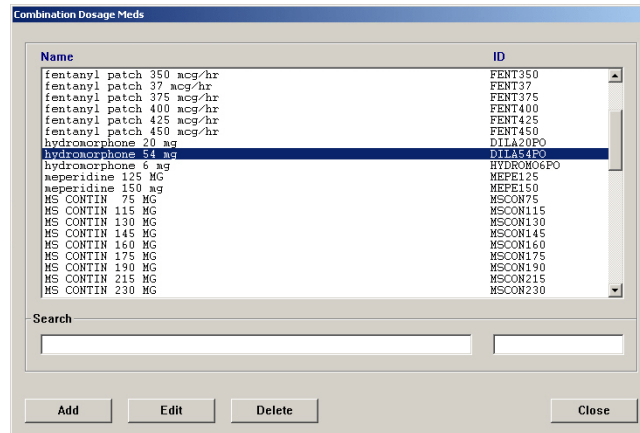
The Combination Dosage Meds dialog box appears.

Editing a combination dose

The following procedure explains how to update a combination dose.

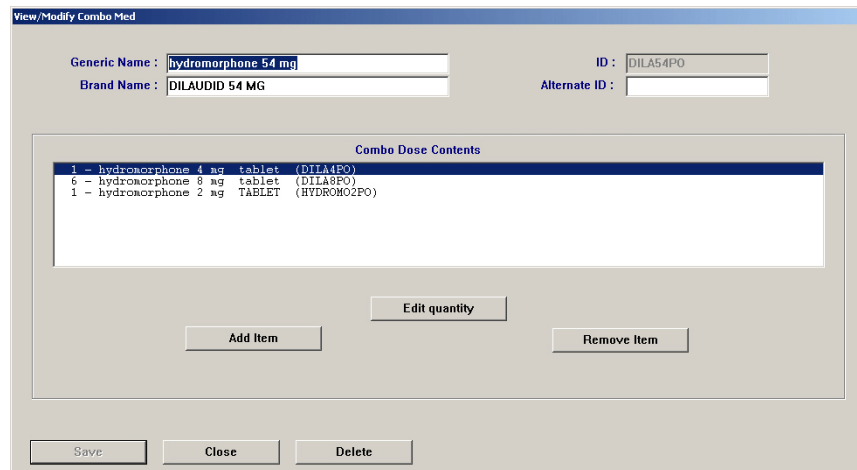
1. Select **System Setup > Formulary Management > Combination Dose**.

In the Combination Dosage Meds dialog box, select or search for the combination dose to update and click **Edit**.



2. In the View/Modify Combo Med dialog box, use the following, as applicable:

- **Add Item**—Add another item to the combination dose.
- **Edit Quantity**—Change the quantity of the selected item.
- **Remove Item**—Remove the item from the combination dose.



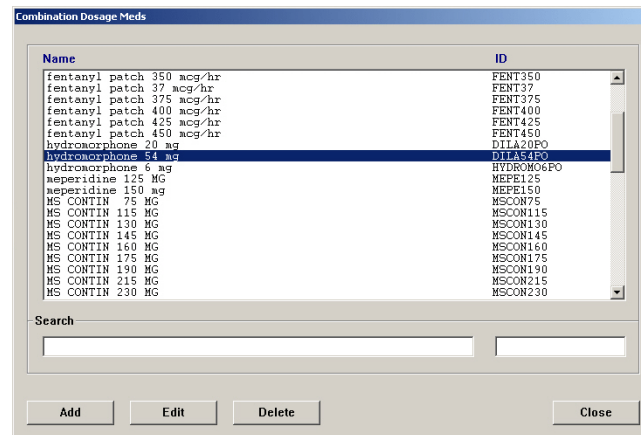
3. Click **Save**.
4. In the confirmation message, click **OK**.
The Combination Dosage Meds dialog box appears.

Deleting a combination dose

The following procedure explains how to delete a combination dose.

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

In the Combination Dosage Meds dialog box, select or search for the combination dose and then click **Delete**.



2. In the confirmation message, click **YES**.
3. In the second confirmation message, click **OK**.

The Combination Dosage Meds dialog box appears.

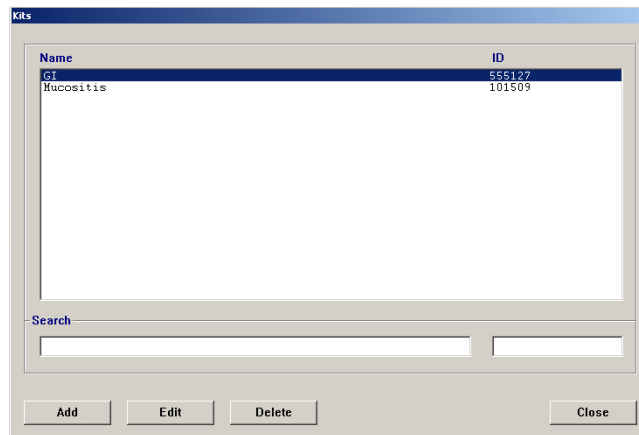
Kits

The Kits feature allows you to define a grouping of medications to be removed with a single selection and assign it to an area in your system. All stations in the area to which you assign the kit display the kit.

Adding a kit

The following procedure explains how to add a kit.

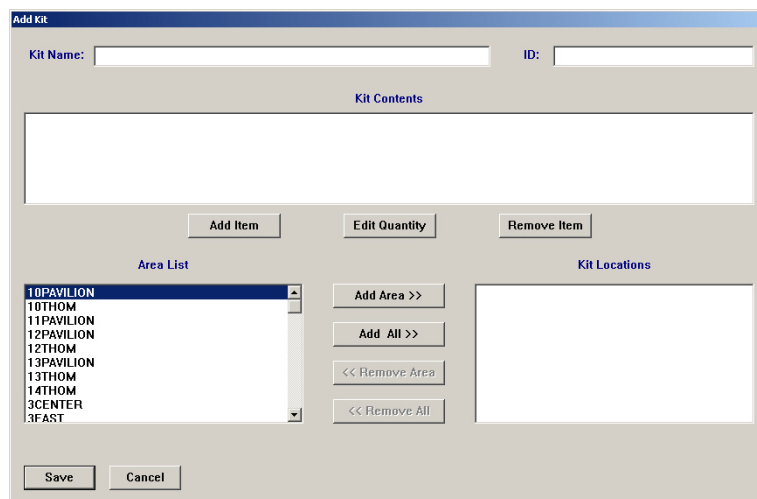
1. Select **System Setup > Formulary Management > Kits**.



2. In the Kits dialog box, click **Add**.
3. In the Add Kit dialog box, enter the **Kit Name** and **ID**.

NOTE

Kit IDs are unique. When you enter a duplicate ID, the system prompts you to change the ID.



4. To add items to the kit, complete the following steps:
 - a. Click **Add Item**.

- b. In the Select med to add to kit dialog box, select a formulary item to add to the kit and click **Select**.

Select med to add to kit.

Generic Name Brand Name 3810 meds in Pyxis formulary.

Med Generic Name	Disp.	Med ID
ergocalciferol 8000 UNIT drops	L	CALC8000
ergonovine maleate 0.2 mg / 1 ml vial	L	223
ergotamine/cafeine 1/100MG tablet	L	ERGO1-10
erlotinib 100 mg TABLET	L	ERLO100
erlotinib 150 mg TABLET	L	ERLO150
erlotinib 25 mg TABLET	L	ERLO25
ertapenem (OPB) 500 mg VIAL	L	ERTAOPB
ertapenem 1 GH VIAL	L	ERTA1
erthromycin 500 mg INJ.	L	ERYT500
erythromycin 1000 mg vial	L	ERYT1
erythromycin base 250 mg TABLET	L	ERYTH250
erythromycin EC 500 mg tablet	L	7977
erythromycin ophthalmic 1 GH ointment	L	EYE
erythromycin oral 200 mg / 5 ml suspension	L	EES200
escitalopram 10 mg tablet	L	ESCI10

Search: Med Generic Name Med ID

eryth

Select Refresh Close

Display only when loaded: L

The Enter Med Quantity dialog box appears, allowing you to confirm your selection and enter the quantity to include in the kit. The quantity defaults to one.

- c. Enter the applicable **Quantity** and click **OK**.
- d. Repeat steps b and c until all applicable items have been added.
- e. Click **Close** to return to the Select med to add to kit dialog box.
5. To designate what areas the kit should be available in, do one of the following:

Add Kit

Kit Name: Newborn ID: 555123

Kit Contents

1 erythromycin ophthalmic	1 GH ointment	EYE
1 phytonadione NEONATE CONCENT.	1 mg / 0.5 ml INJ.	PHYTAMP

Add Item Edit Quantity Remove Item

Area List Kit Locations

10PAVILION
10THOM
11PAVILION
12PAVILION
12THOM
13PAVILION
13THOM
14THOM
3CENTER
3FAST

Add Area >>
Add All >>
<< Remove Area
<< Remove All

Save Cancel

- To add a specific area, select the area from the Area List and click **Add Area**.
- To add all areas, click **Add All**.

The names of the areas you selected move to the Kit Locations list. The kit is available only to those areas.

6. Click **Save**.
7. In the confirmation message, click **OK** to return to the Add Kit dialog box.
8. Click **Close** to return to the Kits dialog box.

Editing a kit

You can add or remove items from a kit, change the quantity of a formulary item included in a kit, or change the areas where a kit is accessible.

1. Select **System Setup > Formulary Management > Kits**.
2. In the Kits dialog box, select the applicable kit and click **Edit**.

View/Modify Kit

Kit Name: ID:

Kit Contents

1	diphenhydramine	25 mg / 10 ml ELIXER	DIPH25/10
1	lidocaine HCL VISCOUS	2 % / 100 ml solution	LIDOVISC
1	MAALOX	30 ml liquid	MAALOX

Area List

10PAVILION
10THOM
11PAVILION
12PAVILION
12THOM
13PAVILION
13THOM
14THOM
3CENTER
3FAST

Kit Locations

3. To add items to the kit, do the following:
 - a. In the View/Modify Kit dialog box, click **Add Item**.
 - b. In the Select Med to Add to Kit dialog box, select a formulary item to add to the kit and click **Select**.
 - c. In the Enter Med Quantity dialog box, 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 dialog box.
 - f. Click **Close** to return to the View/Modify Kit dialog box.
4. To change the quantity of an item in the kit, do the following:
 - a. In the View/Modify Kit dialog box, select the item in the Kit Contents list and click **Edit Quantity**.
 - b. In the Enter Med Quantity dialog box, 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:
 - To add an area, select the area and click **Add Area**.
 - To add all areas, click **Add All**.

- To remove one area, select the area and click **Remove Area**.
 - To remove all areas, click **Remove All**.
7. Click **Save**.
 8. In the confirmation message, click **OK**.
The Kits dialog box appears.

Deleting a kit

The following procedure explains how to delete a kit.

1. Select **System Setup > Formulary Management > Kits**.
2. In the Kits dialog box, select the applicable kit and click **Delete**.
3. In the confirmation message, click **YES**.
4. In the second confirmation message, click **OK**.

Users

A user is anyone who has access to the console or the station (or both). If you have system administrator console privileges, the Users option on the System Setup menu lets you create or modify users and define or modify their privileges, including the nursing unit areas to which they have access. You can also create templates to simplify the process of creating users that have the same privileges.

NOTE

You can update information globally. For more information, see *Updating information globally* on page 139.

Creating templates for user privileges

If you have a group of users you would like to define as having the same privileges, templates save you the time of reentering the same privileges for each user in the group.

NOTE

Privilege templates do not contain area information. Enter area information individually for each user.

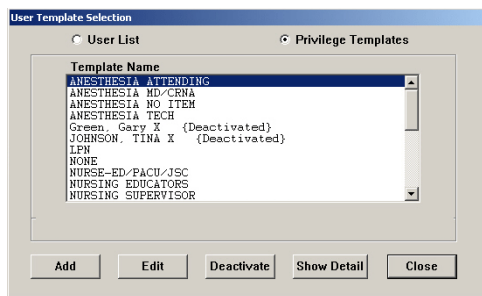
To create a template

1. Select **System Setup > Users**.
2. At the top of the Users dialog box, click **Privilege Templates**.

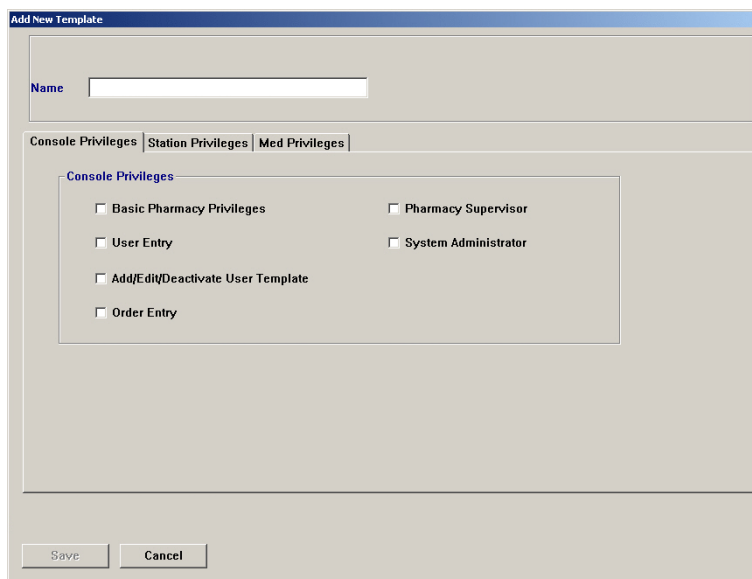
The screenshot shows the 'Users' dialog box with the 'Privilege Templates' tab selected. The dialog displays a list of 27 users currently active in the Pyxis system. The list includes columns for User Name, User ID, Initials, Title, and Template. Below the list is a search section with input fields for User Name, User ID, and User Initials. At the bottom are buttons for Add, Edit, Delete, List by..., and Close.

User Name	User ID	Initials	Title	Template
ADAMS, CHRIS X	032YEP	AC	RN	STAFF NURSE
ADAMS, JENNY X	01F52U	AJ	RN	STAFF NURSE
BAKER, JANICE X	0K968T	BJ	RN	STAFF NURSE
CARTER, ANNE X	0EM002	CA	RN	STAFF NURSE
CLARK, DIANE X	0351V3	CD	RN	STAFF NURSE
GREEN, GARY X	0B9909	GG	TECHNICIAN	PHARMACY TECH
GREEN, THOMAS X	03KJ3V	GT	RN	STAFF NURSE
GRIFFIN, ANDY X	0E2160	GA	TECHNICIAN	PHARMACY TECH
HARRIS, DEANNA X	03NGE2	HD	RN	STAFF NURSE
HILL, TIFFANY X	0JQ055	HT	RN	STAFF NURSE
JACKSON, TOM X	011835	JT	TECHNICIAN	PHARMACY TECH
JAMES, DANNY X	0294L6	JD	RN	STAFF NURSE
KING, JOE X	02P003	KJ	RPA	PHARMACIST
LEE, KATHIE X	0MX334	LK	RN	STAFF NURSE
LEWIS, ETHAN X	0V762V	LE	TECHNICIAN	PHARMACY TECH
LOPEZ, CLAIRE X	03RNLJ	LC	RN	STAFF NURSE
MARTINEZ, JOSEPH X	31142E	GM	RPA	SYSTEMS MANAGER
MITCHELL, KAREN X	03PZ86	MK	RN	NURSE-ED/FACU/JSC
NELSON, CARIE X	9MV278	JL	RN	STAFF NURSE

- In the User Template Selection dialog box, click **Add**.



- In the Add New Template dialog box, enter a name for the template.



- On the **Console Privileges** tab, select the applicable options.
For more information about these options, see *Assigning console privileges to a user* on page 70.
- Click the **Station Privileges** tab and select the applicable options.
For more information about these options, see *Assigning station privileges to a user* on page 71.
- Click the **Med Privileges** tab and select the applicable options.
For more information about these options, see *Assigning medication privileges to a user* on page 75.
- Click **Save**.
- In the confirmation message, click **OK**.
- Click **Close** to return to the User Template Selection dialog box.
Your new template appears in the dialog box.
- To return to the standby dialog box, click **Close**.

Adding a user

This section describes how to add a user. The information for each tab is described separately.

NOTE

When adding a user, you can assign only those privileges that have been assigned to you.

Beginning the process and assigning areas to a user

This section describes how to initiate the addition of a user to the system.

1. Select **System Setup > Users**.
2. In the Users dialog box, click **Add**.

The Add New User dialog box appears with the Areas tab selected.

NOTE

You can now add unlimited access areas.

3. In the upper section of the dialog box, complete the following fields:
 - **User ID**—Enter a unique user ID (up to 10 characters).
 - **First Name**—Enter the user’s first name in this field (up to 20 characters).
 - **Last Name**—Enter the user’s last name in this field (up to 20 characters).

NOTE

Although you can enter up to 20 characters in the First Name and Last Name fields, the system limits the combined total to 20 characters. The result stored in the database might include a truncated version of the first name.

- **Password**—Enter a temporary password for the user. The characters you type display as asterisks.
 - **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 access areas, click **Select Areas**, select the areas in the **Available** list and click **Add**.
 - To select 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. Do one of the following:
 - To assign a predefined set of privileges, complete the steps outlined under *Assigning privileges from a template* on page 69.
 - To assign privileges on an individual basis, skip to *Assigning console privileges to a user* on page 70.

Assigning privileges from a template

After you create a template based on user privileges, you can define a new user and load the template privileges so that the privileges are automatically set up for the new user.

1. In the lower section of the Add New User dialog box, click **Assign Template**.
2. In the User Template Selection dialog box, select the applicable template and click **Select**.

This loads all the privileges defined in the template into the fields for the new user. The name of the applicable template appears above the Save and Cancel buttons.

3. Click **Save**.

The user is added and a blank Add New User dialog box appears.
4. Click **Cancel** to return to the main Users dialog box.

Assigning console privileges to a user

The console privileges are mutually exclusive, with the exception of Basic Pharmacy Privileges, which allows you to log on. If any of the other console privileges are given to you, Basic Pharmacy Privileges is automatically given.

The following table provides examples of users and some of the console privileges that they might need:

Enable This Privilege	For
Basic Pharmacy Privileges	Most pharmacy users.
User Entry	One pharmacist on each shift to assure 24-hour coverage.
Pharmacy Supervisor	A user who manages the Pyxis MedStation system clinical information including formulary, kits, pharmacy configuration, clinical data categories, security groups, discrepancy documentation reasons, override groups (profile mode only), and formulary classifications.
System Administrator	A user who is authorized to: <ul style="list-style-type: none"> • Add, modify, and delete devices (including changing the drawer style and number of pockets for a matrix drawer). • Place a station in or out of service. • Alter station-to-console communications. • Transplant data.

To assign the privileges

1. Click the **Console Privileges** tab.

2. 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. Allows you to assign to others privileges that they themselves have at the console.
 - **Add/Edit/Deactivate User Template**—Allows you to create, modify, or delete a template at the console. When disabled, you see the **Show Detail** button, which allows you to view the privileges associated with a template prior to assigning that template to a user.
 - **Order Entry**—Allows you to add, edit, and delete patient orders at the console. Normally, with a profile interface, all order additions, modifications, and deletions are done through the pharmacy information system and are electronically transferred to the Pyxis MedStation system. The Order Entry privilege is available on devices in profile mode.
 - **Pharmacy Supervisor**—Allows you to manage all clinical information at the console. It also allows you to perform global edits on the formulary and run the autoloading function at the console for all medications that have security access. If running in profile mode, users with this privilege can create equivalencies, combination doses, and variable-dose medications.
 - **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. You can add, edit, or delete area information and identify users who can log on to each station, modify attention notices, and set Site Specific Options.
3. Complete the steps outlined in the next section, *Assigning station privileges to a user*.

Assigning station privileges to a user

Station privileges are those associated with only the station. Each privilege has unique properties, which are mutually exclusive with the exception of Station Login/Witness Ability. If you are given any privilege other than this one, you automatically get Station Login/Witness Ability. Assign remaining privileges on an individual basis.

The following table provides examples of users and some of the privileges they might need:

Enable This Privilege	For
Station Login/Witness Ability	Users who can act as witnesses to the following procedures, but who do not have the authority to perform them: <ul style="list-style-type: none"> • Wasting a medication. • Returning an item. • Completing an inventory. • Documenting a discrepancy. • Recovering a drawer. • Emptying the Return Bin.
Activate/Create Temporary User	Charge nurses or other users who can give another user temporary access to a station.
Admit/Edit/Discharge Patients	Users who: <ul style="list-style-type: none"> • Reconcile patients at the station. • Update patient information. • Add patients to the census that are not usually entered through the facility's patient admitting system. (In most cases, ADT information is managed through the electronic interface between the facility's system and the Pyxis MedStation system.)
Station Administrator	Users who: <ul style="list-style-type: none"> • Have completed the Pyxis MedStation system Manager training. • Are responsible for off-hours troubleshooting support of the station, such as a third-shift pharmacist or nursing supervisor.

To assign the privileges

1. Click the **Station Privileges** tab.

2. 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.

You can change your password and print your activity transactions; all other station functions are unavailable.

- **Station Report Access**—Allows you to run any report at the station. Without this privilege, you can only run reports that are limited to your own activities and discrepancies at that 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. Users would then use their own ID, password, and privileges at the station for temporary access.

This privilege allows you to create a temporary ID and password for someone who does not have access to the station system in the facility. The temporary user has access for up to 32 hours, depending on the time period defined on the Settings tab for the device.

- **Credit Patients**—Allows you to credit the patient when wasting a complete dose of a medication. This situation might arise if a medication package is damaged or contaminated. Patients are automatically credited when medications are returned to the station through the Return feature—either to the original pocket or to the Return Bin.
- **Admit/Edit/Discharge Patients**—Allows you to admit, edit, or discharge patients at the station. Users with this privilege have a Patients button in the Main Menu at the station.
- **Create Permanent Users**—Allows you to create permanent users at the station. This privilege differs from the Activate/Create Temporary User privilege described earlier in that permanent users do not have a time limit. Users with this privilege can assign any station and medication privilege that they themselves have to users they create.

You automatically have both the Station/Login Witness Ability and the Activate/Create Temporary User privilege.

- **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 dialog box, and transplanting data. If the system uses profile mode, you can also turn critical override on or off for a station.
- **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.

Exceptions to the No Witness Required privilege are:

- A user with Independent Inventory Count privilege can inventory without a witness.
- When a station has the Witness Required To/Empty Return Bin option enabled, all returns to the return bin require a witness.
- A user with the Independent Discrepancy Documentation privilege can perform discrepancy documentation without a witness.

- When a medication has the Override option activated on the Formulary Options tab, a witness is required (profile mode only).
 - **Assign/Load Access**—Allows you to select a pocket for a medication and to place the medication physically into that pocket. This option does not apply to MiniDrawers.
 - **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. You can recover a failed drawer and conduct the subsequent inventory of that drawer without a witness, assuming you have access to all medication security groups of the medications in that drawer.
 - **Independent Discrepancy Documentation**—Allows you to document discrepancies at the station without a witness. Otherwise, all discrepancy resolutions require a witness. You must have access to the discrepancy medication’s security group to document the discrepancy.
 - **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 you 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. You can connect head phones or small speakers directly to the CD player. The CD stops when you log out of the system. (This option applies to Pyxis Anesthesia System.)
 - **My Items**—Allows you to maintain a virtual remote stock of items necessary for administering medications to patients. You select items to remove from the loaded items list and physically removes them. The My Items list displays a list of items removed, along with the removed quantity of each. The message type for Remove Items is SVU, which represents “station vend to user” (unique to Pyxis Anesthesia System). After an item is in the My Items list, it can be issued to a patient, transferred to another user, returned, or wasted.
3. Complete the steps outlined in the next section, *Assigning medication privileges to a user*.

Assigning medication privileges to a user

The following procedure explains how to assign medication privileges.

1. Click the **Med Privileges** tab.

The screenshot shows the 'Edit User ADAMS, CHRIS X' dialog box. The 'Med Privileges' tab is selected. The user ID is 032YPP, name is ADAMS, CHRIS X, and title is RN. The 'Med Privileges' section has a table for Security Groups (A-J) and Override Groups (GENERAL, ICU, TELE, NEURO, ALL MEDS).

Security Groups →	Select	A	B	C	D	E	F	G	H	I	J	Select
Remove	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
Inventory	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
Load	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
Unload	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
Refill	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
RxCheck	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All

Security Group Names:

- A: Misc. controlled
- B: Controlled C-II
- C: Controlled C-III
- D: Controlled C-IV
- E: Non-controlled
- F: RESPIRATORY MEDS
- G: ENDOSCOPY NURSES
- H: Supplies
- I: AS-1
- J: AS-2

Override Groups:

- (1) GENERAL
- (2) ICU
- (3) TELE
- (4) NEURO
- (5) ALL MEDS

Privilege Template : STAFF NURSE. Assign Template

Save Cancel Delete Reset BioID

2. In the Security Groups section, select the applicable group for each function listed.
 - To select all groups for a particular function, click **All**.
 - To clear all security groups for a particular function, click **None**.

NOTE

The Security Group Names legend indicates what each group represents. The console provides you with eight default names (A-H). Groups I–J are reserved for Pyxis Anesthesia System.

3. Select the override groups that you can access at the station.
4. After you have finished adding the medication privileges, click **Save**.
The user is added and a blank Add New User dialog box is provided so that you can continue adding users.
5. Click **Close** to return to the main Users dialog box.

Filtering the users list

If many users are defined, you might find it useful to display only a subset of them, such as only those in a particular area.

1. Select **System Setup > Users**.
2. In the Users dialog box, click **List by**.
3. In the Users – Display users who meet the following criteria dialog box, 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.

Users - Display users who meet the following criteria...

In area: any area

Show all active users.

Show users invalid within 30 days. Refresh List

User Name	User ID	Initials	Title	Template
ADAMS, JENNY X	01F52U	AJ	RN	STAFF NURSE
BAKER, JANICE X	0K968T	BJ	RN	STAFF NURSE
CARTER, ANNE X	0E9002	CA	RN	STAFF NURSE
CLARK, DIANE X	035193	CD	RN	STAFF NURSE
GREEN, THOMAS X	03KJ3W	GT	RN	STAFF NURSE
HARRIS, DEANNA X	03NCE2	HD	RN	STAFF NURSE
JAMES, DANNY X	027416	JD	RN	STAFF NURSE
LEE, KATHIE X	0M283A	LK	RN	STAFF NURSE
NELSON, CARIE X	9MV278	JL	RN	STAFF NURSE
SMITH, ANGIE X	0E659K	SA	RN	STAFF NURSE

Search

User Name: [] User ID: [] User Initials: []

Add User List

4. To return to the Users dialog box, click **User List**.

Updating information for an existing user or group of users

This section describes how to update information to use either individual selections or by updating the applicable template. (Additional options might be available for update via the Global Edits option. For information about updating user information globally, see *Updating user information globally* on page 146.) This section includes the following topics:

- *Updating information for one user* on page 76
- *Updating a user-privilege template* on page 77

NOTE

When modifying information for a user, you can assign only those privileges that have been assigned to you. If you have User Entry privileges, you can assign any privileges to a user as well as to a template.

Updating information for one user

The following procedure explains how to update the information for an existing user.

1. Select **System Setup > Users**.
2. In the Users dialog box, select the applicable user and click **Edit**.
3. Update the applicable information on each tab.
4. Click **Save**.

5. To return to the standby dialog box, click **Close**.

Updating a user-privilege template

The following procedure explains how to update the information for an existing template.

CAUTION

Modifying a template affects privileges for all users assigned to that template.

To update a template

1. Select **System Setup > Users**.
2. In the Users dialog box, click **Privilege Templates**.
3. In the User Template Selection dialog box, select the applicable template and click **Edit**.

NOTE

The Show Detail button provides a way to view the Privilege Template. You can view the template but cannot make any changes.

4. In the Edit Template dialog box, update the applicable information on each tab.
5. Click **Save**.
6. You are returned to the User Template Selection dialog box.

Deleting a user

The following procedure explains how to delete a user.

1. Select **System Setup > Users**.
2. In the Users dialog box, select the applicable user and click **Delete**.
3. In the confirmation message, click **YES**.

Deactivating a user-privilege template

The following procedure explains how to deactivate a privilege template.

1. Select **System Setup > Users**.
2. In the Users dialog box, click **Privilege Templates**.
3. In the User Template Selection dialog box, select the applicable template and click **Deactivate**.

NOTE

The Show Detail button provides a way to view the Privilege Template.

NOTE

Privilege Templates cannot be deactivated if assigned to users.

4. In the confirmation message, click **YES** to continue.
The User Template Selection dialog box appears.

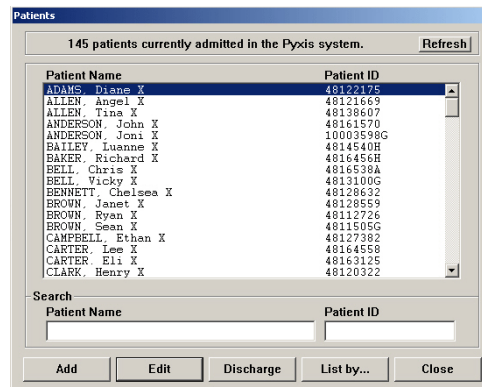
Patients

Usually, additional patient files and updates to existing files come via your facility's ADT computer interface or pharmacy profile interface (if the profile option is activated). However, there are procedures that you can perform using The Pyxis MedStation system to use existing files. Patient information is entered by your facility. Information can be entered for temporary patients at the station, not the console.

Adding a patient file

The following procedure explains how to create a patient's record.

1. Select **System Setup > Patients**.
2. In the Patients dialog box, click **Add**.



The New Patient Setup dialog box appears with the Location tab selected.

First Name: Last Name:

I.D.: Source: 4KCONS

Alt. ID 1: Alt. ID 2:

Location | Comments | Clinical | Order Data | Allergies

Facility: Nursing Unit: Room: Bed:

Visit Nurse Unit: Visit Discharge:

Admission Date: 10/21/2008 @ 18:17 Auto-Discharge Date:

Save Close

3. In the upper section of the dialog box, enter the following:
 - **First Name**—Enter the user's first name in this field (up to 20 characters).
 - **Last Name**—Enter the user's last name in this field (up to 20 characters).

NOTE

Although you can enter up to 20 characters in the First Name and Last Name fields, the system limits the combined total to 20 characters. The result stored in the database might include a truncated version of the first name.

- **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. This field is used primarily for facilities with affiliations or those that have merged and are made up of more than one hospital or nursing home.
 - **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 (for example, OR).
 - **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.

The screenshot shows a software window titled "New Patient Setup". At the top, there are input fields for "First Name" and "Last Name". Below these are fields for "I.D.", "Alt. ID 1", and "Alt. ID 2". To the right of these fields is a "Source:" label with the value "4KCONS" displayed in red. Below the input fields is a tabbed interface with the following tabs: "Location", "Comments", "Clinical", "Order Data", and "Allergies". The "Comments" tab is currently selected and active. It contains several input fields: "Patient comments", "Admitting Dr.", "Attending Dr.", "DRG Code", and "Patient Scan Code". At the bottom of the window, there are two buttons: "Save" and "Close".

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.

The screenshot shows the 'New Patient Setup' window. At the top, there are fields for 'First Name', 'Last Name', 'I.D.', 'Alt. ID 1', and 'Alt. ID 2'. A 'Source' field contains '4KCONS'. Below these is a tabbed interface with 'Clinical' selected. The 'Clinical' tab contains:

- 'Date of birth' with a date picker and 'MM/dd/yyyy' format.
- 'Sex' with a dropdown menu showing 'U'.
- 'Height' with a text input and a dropdown menu showing 'U'.
- 'Weight' with a text input and a dropdown menu showing 'M'.
- An 'Estimate' checkbox.
- A large text area for 'Diagnosis'.

 At the bottom left, there are 'Save' and 'Close' buttons.

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 (U/INCHES/FEET/CM/M).
 - **Weight**—Enter the patient’s weight and select the applicable measurement unit (M/OZ/LBS/G/KG).
 - **Estimate**—If the height and weight are unverified, select this box.
 - **Diagnosis**—Enter a text-based description of the patient’s condition.

- Click the **Order Data** tab.

The items in the Order Data tab are populated by information you enter in the New Order Setup dialog box.

- To get to the New Order Setup dialog box, click **Add**.

NOTE

You will be asked to save your patient data before editing/adding orders. Click **Yes** to continue to the next dialog box.

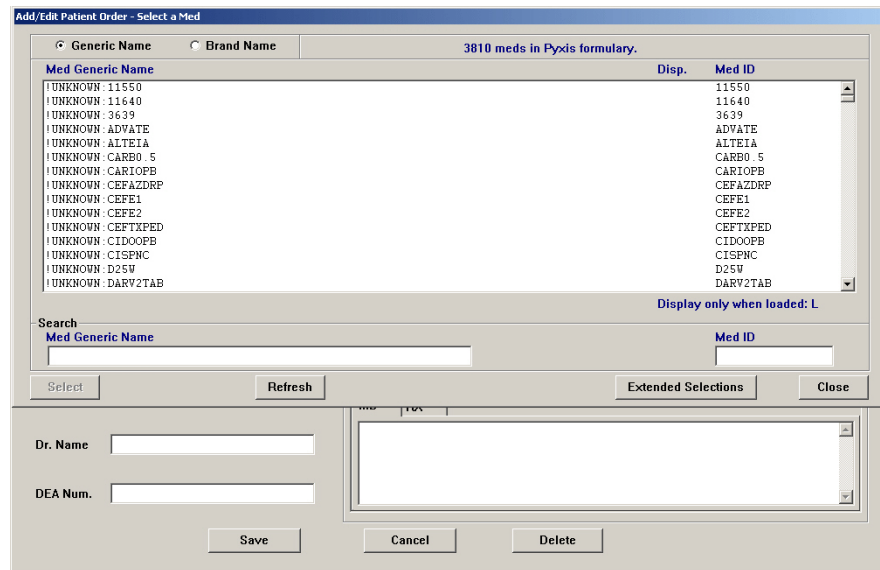
- Enter the order information for your patient in these areas:
 - Order**—Determined by your facility.
 - Order Description**—Enter the order description.
 - Type** (select one):

- **Scheduled**—Administer as scheduled.
- **PRN**—Administer as needed.
- **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. If applicable, indicate PRN as part of the interval text. If the order is for a large volume parenteral (continuous IV drips), enter the rate of administration as the interval text (for example, BID, Q6H PRN, QOD, 125ML/HR).
- **Order Start**—Enter the date and time that the order is to begin. The start time is normally the date and time of the first scheduled dose for scheduled medications, or the current time for PRN and statim (STAT) medications. Highlight the value to change (month, day, or hour) and type a new value. Optionally, you can use the up or down arrows to increase or decrease the value, respectively.
- **Order Stop**—Enter the date and time that the order is to end.

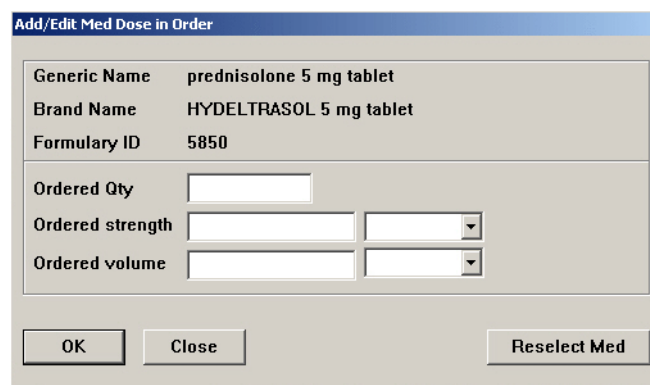
For PRN orders, the stop time is often an automatic stop time based to facility policy. For scheduled medication orders, the stop time is normally the date and time of the last scheduled dose as defined by the automatic stop-time policy of the facility. If a specific duration is ordered for IV drips, reflect this duration in the stop time. Highlight the value to change (month, day, or hour) and type a new value. Optionally, you can use the up or down arrows to increase or decrease the value, respectively.
- **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. Dosing times allow the use of the Remove by Time feature at the station. To delete a dosing time, highlight it and click **Del**.
- **Give only on**—If the order is given only on certain days of the week, select the boxes for the appropriate days. This option is for documentation purposes only and the days you choose show up when the you click Review Order on the Remove dialog box at the station. The order is actually accessible on any day at the station.
- **Every other day**—Select this option for orders given on alternate days. This option is for documentation purposes only and the days you choose

show up when the user clicks Review Order on the Remove dialog box at the station. The order is actually accessible on any day at the station.

- **Notes**—Enter any other notes or comments related to this order.
 - **Dr. Name**—Enter the name of the prescribing physician. This is important for controlled-substance record keeping.
12. **DEA Num.**—Enter the Drug Enforcement Administration (DEA) number of the prescribing physician. In the Med Info tab click **Add Med** to select your medication. The Add/Edit Patient Order - Select a Med dialog box appears.



13. Click **Generic Name** or **Brand Name**. You can use the scroll bars to find your medication or enter the name in the Search box.
14. Click the medication name.
15. Click **Select**. The Add/Edit Med Dose in Order dialog box appears.



16. In the Add/Edit Med Dose in Order dialog box, 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 dialog box with the Med Info tab populated by the information you provided.
18. Click **Save**. You are returned to the New Patient Setup dialog box 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**.

Using the expanded allergies feature

The expanded allergies feature allows the console to display full patient allergy information from your facility information system. It also can be manually entered within the Pyxis MedStation system network. This feature also displays multiple reactions and severities associated with a given allergy.

If multiple allergies with multiple fields are entered, the console sends a message to the station. The message alerts your facility's personnel to check the patient's chart.

NOTE

Once the expanded allergies feature is enabled, it must stay enabled or the system will not synchronize.

1. To manually enter information in the expanded allergies section, go to **System Setup > Patients**.
2. In the Patients dialog box, 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 dialog box or the New Patient Setup dialog box, click the **Allergies** tab.

View/Modify Patient BELL, Vicky X (4813100G) Last Activity was 11/05/2007 at 14:28

Name: BELL, Vicky X
 I.D.: 4813100G
 Alt. ID 1: 13217851 Alt. ID 2: 20261048P02
 Source: procar

Location | Comments | Clinical | Order Data | **Allergies**

DESCRIPTION	SEVERITY	REACTION	TYPE	CC
Description 1	Severity 2	Reaction 10	TY	Cc
Description 1	Severity 1	Reaction 12	TY	CC

Add Edit Delete

Save Close Discharge

4. Do one of the following:
 - Click **Add** to add new allergy information.
 - Highlight an allergy in the Allergies list box and click **Edit** to update information for that allergy.
5. Enter information in the Add/Edit Patient Allergies dialog box.

Add/Edit Patient Allergies

Allergy Data

Description: [Yellow Highlighted Field]

Severity: [Drop-down menu]

Reaction: [Text field]

Type: [Drop-down menu]

Code: [Text field]

OK Cancel

- **Description**—must be filled in.
- **Severity**—select a blank entry, SV, MO, and MI from the drop-down list.
- **Reaction**—enter a description of the patient’s reaction to the allergen.
- **Type**—must be filled in. Select a blank entry, DA, FA, MA, and MC from the drop-down list.

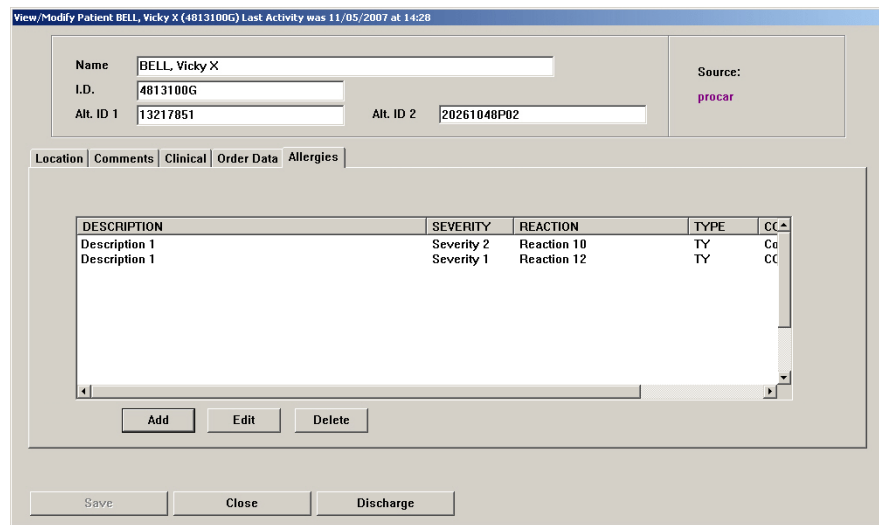
- **Code**—must be filled in when added at the console through this dialog box. There are times when the Code field will be blank due to entries created when this feature is turned off or due to interface requirements.
6. Click **OK** to save the information.

Multiple severities and reactions for one allergy

This feature allows you to display multiple severities and multiple reactions for a single allergy.

When multiple severities exist for a single allergy, they are listed in multiple rows, each containing the same description, type, and code. When multiple reactions exist for a single allergy, they are also listed in multiple rows containing the same description, type, and code.

This information comes from your facility’s interface and requires NGPP v1.4 or higher.



Using the enhanced pre-admit hold order

This feature allows Pyxis 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 the **Settings** tab.
5. Enter the desired hold time in the Pre-Admit Lead Time field.
6. Click **Save**.

Editing a patient file

The following procedure explains how to edit a patient's record.

1. Select **System Setup > Patients**.
2. In the Patients dialog box, select the applicable patient and click **Edit**.
3. In the View/Modify Patient dialog box, update the applicable information.
For information regarding the various tabs and fields, see *Adding a patient file* on page 79.
4. Click **Save**.

Discharging a patient

The following procedure explains how to discharge a patient.

1. Select **System Setup > Patients**.
2. In the Patients dialog box, select the applicable patient and click **Discharge**.
3. In the confirmation message, click **YES** to continue.

Filtering the list of patients

Filtering provides a way to display only a subset of patients if you have many patients.

1. Select **System Setup > Patients**.
2. In the Patients dialog box, click **List by**.

- In the Patients – Display Patients Who Meet the Following Criteria dialog box, select the criteria by which you want to filter which patients appear. The dialog box automatically refreshes to display the applicable patients as you continue to select criteria.

Patients - Display patients who meet the following criteria...

On nurse unit: all units

Patient Status: Currently admitted, Pre-admitted, Discharged

Patient Source: Entered at Console or Station, Entered via hospital admissions

Patient Name	Patient ID
ADAMS, Diane X	48122175
ALLEN, Angel X	48121669
ALLEN, Tina X	48138607
ANDERSON, John X	48161570
ANDERSON, Joni X	10003598G
BAILEY, Luanne X	4814540H
BAKER, Richard X	4816456H
BELL, Chris X	4816538A
BELL, Vicky X	4813100G

Search: Patient Name, Patient ID

Buttons: Add, Patient List

- To return to the complete list of patients, click **Patient List**.

Patient billing reconciliation

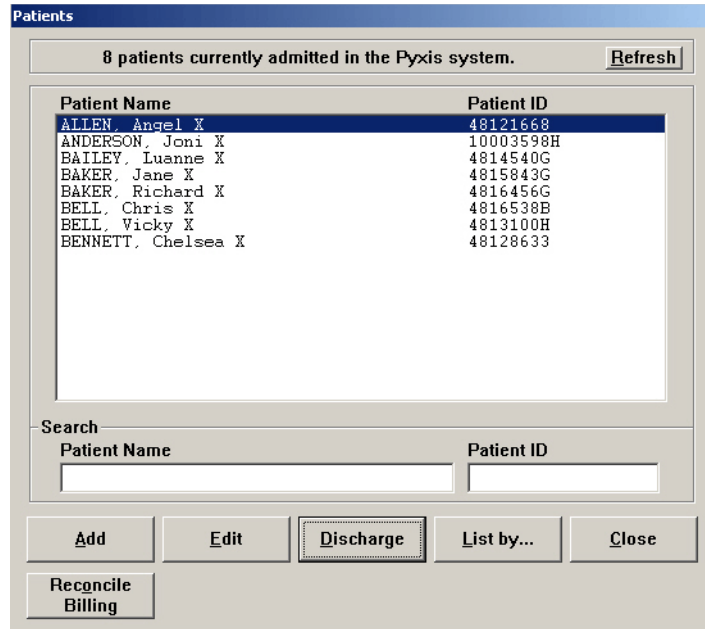
This feature allows customers to associate temporary patient data with permanent patient data. The feature:

- Requires users to have “System Administrator” privileges to associate temporary and permanent patient records.
- Retains billing transactions for temporary patients for a configurable period of time.
- Associates records of one or more temporary patients with a permanent patient.

In addition, the console also provides a means of producing a report that contains records of the financial transactions associated with patients whose records were merged. See *Reconciled Patients Charges and Credits* on page 170.

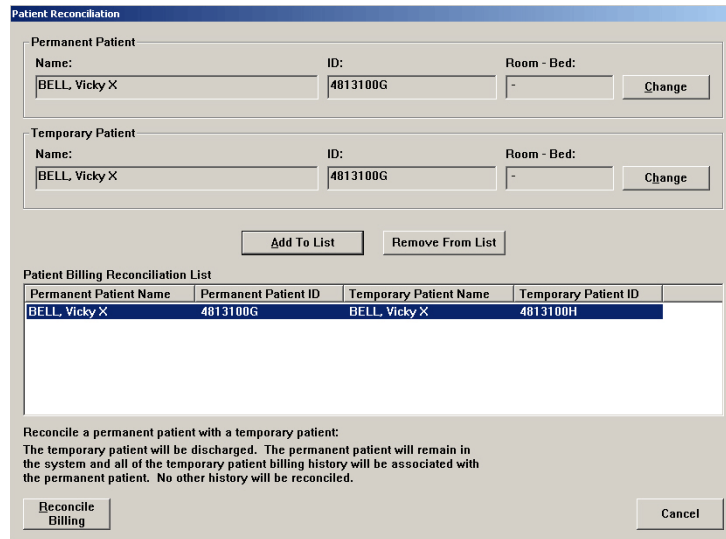
Using the reconcile feature

1. To set up this feature, select **System Setup > Patients**.
2. In the Patients dialog box, click **Reconcile Billing**.



The Patient Reconciliation dialog box 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 dialog box 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.

The console provides a means of producing a report that contains records of the patients. See *Reconciled Patients* on page 172. It reconciles permanent patients to temporary patients. This includes:

- The name and ID of the user who created the association.
- The time the patient records were reconciled.

Areas

Areas define the geographic locations (usually nursing units or groups of nursing units) associated with stations and users. You must assign each station and user-defined device in the Pyxis MedStation system to an area.

Primary Nursing Units defines which units will go to such devices as Pyxis Anesthesia System or Pyxis® DuoStation. These are devices that are not compatible with the expanded nurse feature.

WARNING

The association of Nurse Units to Areas governs how the system routes messages to dispensing devices. Increasing the number of Nursing Units per Area multiplies the number of destinations that receive the messages for a patient and their activities. There is a tradeoff between widely broadcasting the information vs. the potential to slow the system.

If you see delays in message processing after increasing the number of Nursing Units per Area, contact your local Pyxis support specialist for additional guidance for configuring your system with more or fewer Nursing Units per Area.

NOTE

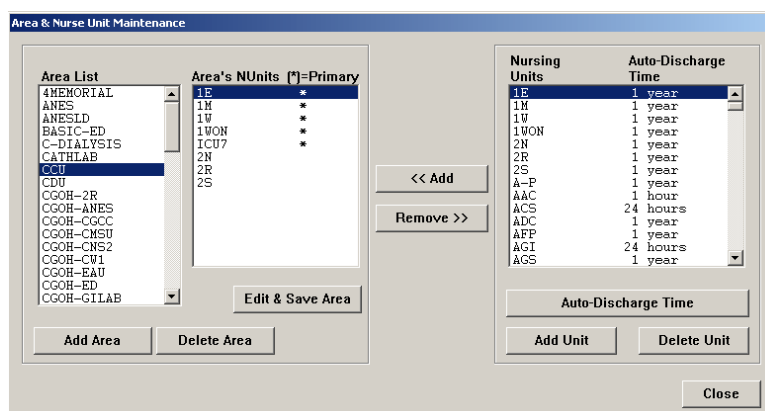
The Room & Bed option listed in the System Setup > Area Configuration menu is not used. However, you can assign a room and bed number to a patient (for more information, see *Adding a patient file on page 79*).

Adding a nursing unit

Nursing units are normally created automatically when an ADT interface is activated. If nursing units do not exist in the system, you must create them manually before you can define areas. In Pyxis MedStation 4000 system SR3, you can select more than six nursing units to be assigned to one area to a maximum of 15 units.

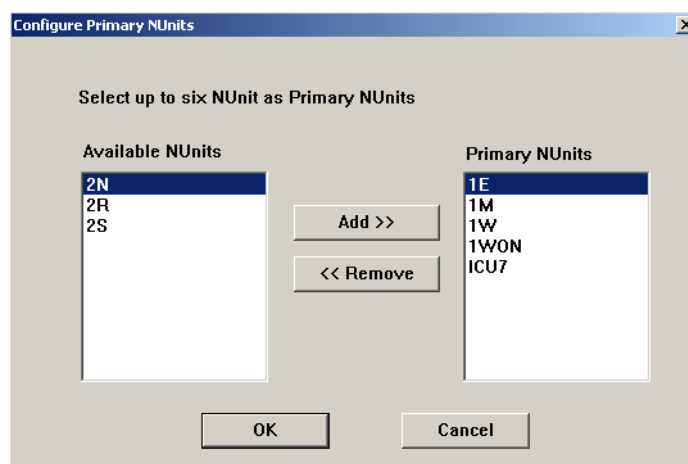
1. Select **System Setup > Area Configuration > Areas**.

- In the Area & Nurse Unit Maintenance dialog box, click **Add Unit**.



If there are more than six nursing units, the Configure Primary NUnits dialog box appears.

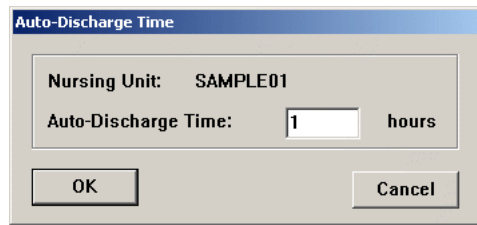
- In the Available NUnits box, highlight the NUnit you want and click **Add**. Doing this moves the unit to the **Primary NUnits** box.



- In the **Primary NUnits** box highlight the NUnit and click **Remove**. Doing this moves the unit to the **Available NUnits** box.
- Click **OK**.
The new unit appears in the Nursing Units section of the Area & Nurse Unit Maintenance dialog box.
- To change the auto-discharge time (the default is one year), do the following:
 - Select the nursing unit and click **Auto-Discharge Time**.
 - In the Auto Discharge Time dialog box, enter the auto-discharge time in hours and click **OK**.

NOTE

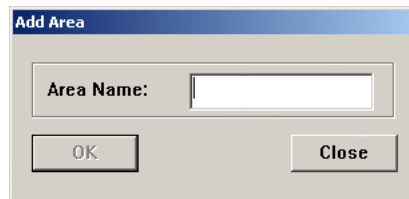
Clearing an existing value sets the value back to one year.



Adding an area

The following procedure explains how to add an area.

1. Select **System Setup > Area Configuration > Areas**.
2. In the Area & Nurse Unit Maintenance dialog box, click **Add Area**.
3. In the Add Area dialog box, enter a name for the area (up to 10 characters) and click **OK**.



The new area appears in the Area List section of the dialog box. The system highlights it because you must assign nursing units to it before you can save it.

4. In the **Area List** section of the Area and Nurse Unit Maintenance dialog box, 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**.

The selected unit is listed in the Area's NUnits section of the dialog box.

6. Click **Save Area**.
7. To return to the standby dialog box, click **Close**.

Adding or removing a nursing unit to or from an area

You can assign up to six nursing units to an area.

1. Select **System Setup > Area Configuration > Areas**.
2. In the **Area List** section of the Area & Nurse Unit Maintenance dialog box, select the applicable area.

The nursing units currently associated with the area are shown in the Area's NUnits list.

3. To add units to the selected area, select the units from the Nursing Units list and click **Add**.
4. To remove units to the selected area, select the units from the Area's NUnits list and click **Remove**.
5. Click **Save Area**.
6. To return to the standby dialog box, click **Close**.

Deleting an area

The following procedure explains how to delete an area.

1. Select **System Setup > Area Configuration > Areas**.
2. In the Area List section of the Area & Nurse Unit Maintenance dialog box, select the applicable area and click **Delete Area**.
3. In the confirmation message, click **YES** to continue.
4. To return to the standby dialog box, click **Close**.

Deleting a nursing unit

The following procedure explains how to delete a nursing unit.

1. Select **System Setup > Area Configuration > Areas**.
2. In the Nursing Units section of the Area & Nurse Unit Maintenance dialog box, select the applicable unit and click **Delete Unit**.
3. In the confirmation message, click **YES**.
4. To return to the standby dialog box, click **Close**.

Clinical data

At the console, you can configure formulary items to require the user to enter clinical data (such as route of injection, observations, and evaluation data) when removing, returning, or wasting an item.

When you return, remove, or waste an item, a list of clinical data selections might appear at the station. Select one or more responses or types a response, depending on how the category is defined.

Clinical data is passed directly to an automated charting system as part of the charting transaction.

You can create original clinical data categories and responses or use the pre-defined clinical data categories.

NOTE

Before configuring a formulary item, add CDCs.

Predefined Clinical Data Categories (CDCs)

There are 33 predefined CDCs. Use predefined CDCs to save time and effort in implementation.

You can edit or delete the predefined CDCs, just as you would edit or delete any other CDCs.

NOTE

After you delete a predefined CDC, you cannot restore it.

The following table describes the predefined CDCs and their responses:

Predefined CDC	Text	Responses
Allergies	Check Allergies	<ul style="list-style-type: none"> (CALL RPh) Possible allergy (DO NOT GIVE) Has allergy (OKAY) Not allergic
Anesthesia Kit	Do not return kit here	<ul style="list-style-type: none"> Return to USED KIT pocket
Anticoagulants	Anticoagulant sticker req.	Anticoagulant sticker placed on front of chart
Central Line	Infuse through central line only	<ul style="list-style-type: none"> (CANCEL REMOVE) No central line (OKAY) Pt has central line
Chemotherapy	Chemotherapy handling precautions	<ul style="list-style-type: none"> (OKAY) will handle safely
Do not crush	Do not crush	<ul style="list-style-type: none"> (CALL RPh) Pt has feeding tube (OKAY) Pt can swallow

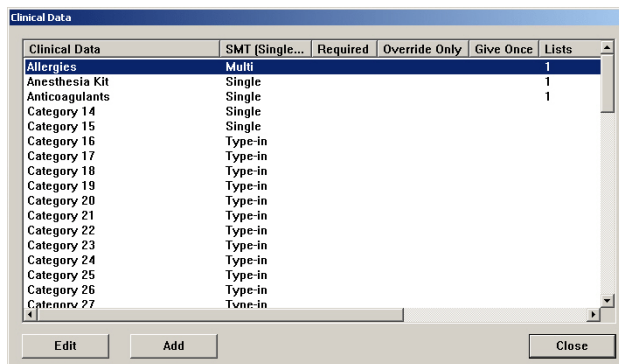
Predefined CDC	Text	Responses
Drug Interaction	Drug Interaction	Do not administer drug A if patient receiving drug B
Drug Protocol	Please refer to protocol ###	
Heparin	Has Patient Received Lovenox?	If not, ADMINISTER If so, CANCEL & CALL PHARMACY
Heparin Flush	Use NS for routine line flush	<ul style="list-style-type: none"> (OKAY) Heparin is indicated not NS
Hx seizures/renal failure	Hx seizures/renal failure	<ul style="list-style-type: none"> (CANCEL –Page RPh) Seizure/Renal (OKAY TO GIVE) No history
Hypaque allergy	Allergic to Iodine/Contrast?	<ul style="list-style-type: none"> (CALL RPh) Possible allergy (DO NOT GIVE) Has allergy (OKAY TO GIVE) No allergy
INR	What is current INR?	<ul style="list-style-type: none"> (Type in response)
INR	INR	<ul style="list-style-type: none"> <1.5 Give dose and call MD 1.5-2.0 (OKAY TO GIVE) >2.0 Hold dose and call MD
IV push rate	Give IV push over XX minutes	
Lidocaine PF	Is it preservative free?	<ul style="list-style-type: none"> (CALL PHARMACY) Mis-filled med (OKAY TO GIVE) No preservative
Magnesium alert	For Eclamptic seizure tx only	<ul style="list-style-type: none"> (DO NOT GIVE) Cancel remove (OKAY) Usual dose = 4 Grams
Maximum Use per day	Maximum is 4G/day	<ul style="list-style-type: none"> (CANCEL) Total >4g in 24 hours (OKAY) Total <4g in 24 hours
Must dilute	Must be diluted before use	<ul style="list-style-type: none"> (OKAY) I will dilute
Only IM	Only IM	<ul style="list-style-type: none"> (OKAY) I will give IM
Override Documentation	Remember to document reason for override in Patient Chart	
Override Reason	Reason for override	<ul style="list-style-type: none"> Not an emergency, will wait Code 90Acute pain HR/BP outside limits Nauseated Allergic Reaction Antidote/reversal agent

Predefined CDC	Text	Responses
Override Reason (problem assessment period)	Reason for override	<ul style="list-style-type: none"> • New admission and pharmacy closed • Patient emergency • MD verbal order and MD at bedside • Pharmacy took >1 hour to profile order
Pain Scale	Pain Scale	1 2 3 4 5
Paralytics	Is Pt on ventilator?	<ul style="list-style-type: none"> • (CANCEL REMOVE) Not on ventilator • (OKAY TO GIVE) Pt on ventilator
PCN allergy	Do not give if pen allergic	<ul style="list-style-type: none"> • (CALL RPh) Possible allergy • (DO NOT GIVE) Has allergy • (OKAY) Not allergic
Reason for use	Reason for use	For pain For temperature
Removed For	Removed on behalf of	<ul style="list-style-type: none"> • Dr. John Brown • Dr. Peter Jones • Dr. Mary Smith
Return	Reason for Return	<ul style="list-style-type: none"> • Pt off floor • Pt asleep • Pt nauseated • Pt refused • Titrated dose
Return Bin	Don't return to bin	<ul style="list-style-type: none"> • (OKAY) I need to waste
Route of Admin	Route of Admin	<ul style="list-style-type: none"> • IV • IM
Used Anesthesia Kit	Is anesthesia record included?	<ul style="list-style-type: none"> • (YES) Anesthesia record inside
Vancomycin DUE	Reason for vancomycin order	<ul style="list-style-type: none"> • MRSA Penicillin allergic

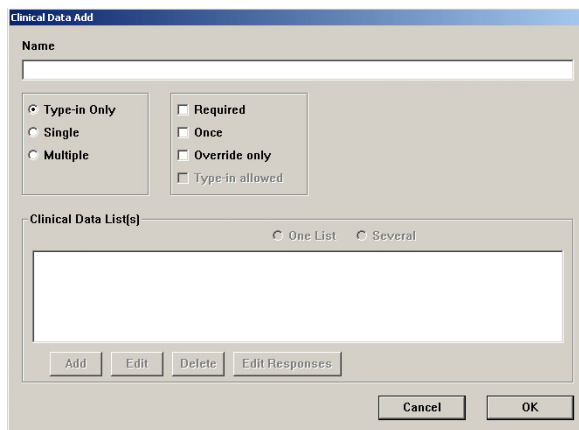
Adding a CDC

When you install the Pyxis MedStation system, you can define new CDCs.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, click **Add**.



3. In the Clinical Data Add dialog box, 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. The user selects one item from the response list when removing, wasting, or returning the medication.

Multi—The user can select from one to three responses from the list when removing or returning a medication.

NOTE

If you want to create predefined responses, you must select Single or Multi to ensure that the Add button appears on the Clinical Data Edit dialog box when you are reading to create the responses.

5. To require the user to enter clinical data, select **Required**.

NOTE

Clearing the Required check box allows the user to bypass entering clinical data.

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**.

NOTE

Clearing the Once check box requires the user to enter clinical data for each medication that is removed or returned. If you select **Once**, you only enter CDC information once for several medications—if these medications have the same CDC turned on. The CDC information must be entered again when these medications are removed at the next dosing time.

7. If the you enter the clinical data only when removing a medication via the override process or the patient's profile, select **Override only**.

NOTE

Clear the Override Only option to allow the user to enter clinical data for both profile and override transactions.

8. To allow you to type in free-form text with a Single or Multi category type, select **Type-in allowed**.

NOTE

This is helpful when the correct option does not exist in the response list. This option does not apply to the Type-in category type.

9. If only one response list available for this CDC, select **One List**.
10. To define more than one list for this category, select **Several**.

NOTE

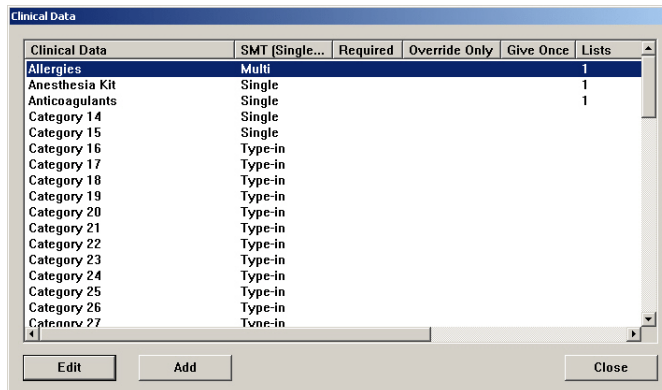
If you select Several, you must define a name for each list and the responses for each list name.

11. When you are finished, click **OK** to save your changes.
12. To return to the standby dialog box, click **Close**.

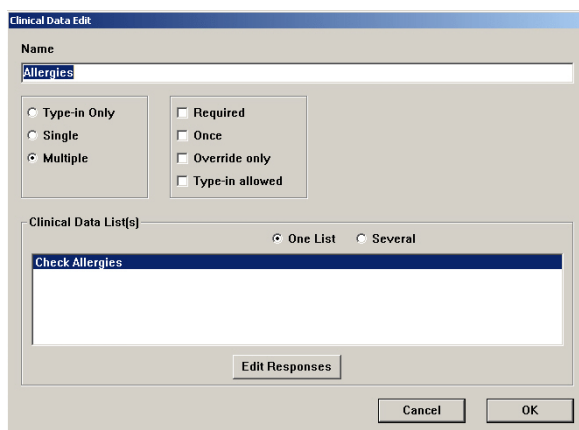
Editing a CDC

The following procedure explains how to update a CDC.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, select the CDC name and click **Edit**.



3. In the Clinical Data Edit dialog box, enter the new category name in the Name box (for more information, see *Adding a CDC on page 99*).



4. When you are finished, click **OK** to save your changes.
5. To return to the standby dialog box, click **Close**.

Using a CDC response

This section includes the following topics:

- *Adding a response for a CDC on page 102*
- *Adding a multiple-response list on page 103*
- *Editing a multiple-response list on page 104*
- *Deleting a response from a multiple-response list on page 104*

Adding a response for a CDC

The following procedure explains how to add responses for a CDC.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, select the CDC name and click **Edit**.

NOTE

If you select a CDC without lists created, you must change the CDC to Single or Multi and click YES in the Categories dialog box that appears. The Add button appears on the Clinical Data Edit dialog box.

3. In the Clinical Data Edit dialog box, select **One List** and click **Add**.

Clinical Data Edit

Name
Category 16

Type-in Only
 Single
 Multiple

Required
 Once
 Override only
 Type-in allowed

Clinical Data List(s)
 One List Several

Add

Modified Cancel OK

4. In the Add List Name and Responses dialog box, enter the name.

Add List Name and Responses.

List
Name
Allergies

Save

Responses

Add Edit Delete

Close

5. Click **Save**.
6. Click **Add**.
7. In the Add Response dialog box, enter the response and click **Save**.

Add Response.

Response

Save Close

8. When the list of responses is complete, click **Close**.
The Add List Name and Responses dialog box appears with the updated responses listed.
9. Click **Close**.
The Clinical Data Edit dialog box appears with the new Clinical Data List.
10. Click **OK** and then click **Close**.
11. In the Clinical Data dialog box, click **Close**.

Adding a multiple-response list

For some CDCs, you might find it helpful to define multiple lists of responses. You must provide a name for each list and the responses that make up each list.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, select the CDC name and click **Edit**.

NOTE

If you select a CDC without lists created, you must change the CDC to Single or Multiple and click YES in the Categories dialog box that appears. The Add button appears on the Clinical Data Edit dialog box. If you select the **Several** option button, inactive **Edit** and **Delete** buttons appear next to the **Add** button.

3. In the Clinical Data Edit dialog box, select **Multiple** and click **Add**.
4. In the Add List Name and Responses dialog box, enter the Name in the List section and click **Save**.

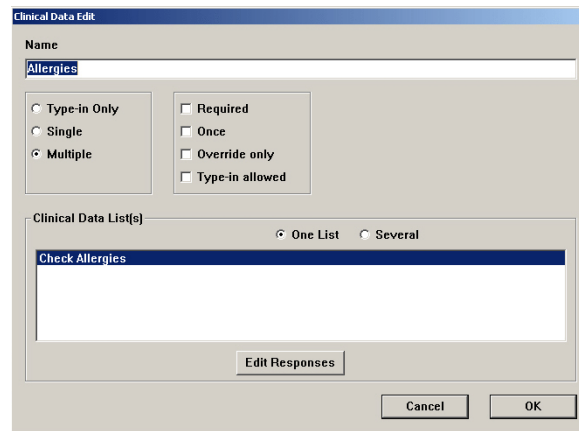
5. Click **OK**.
6. Click **Add** in the Responses section to enter response information.
7. In the Add Response dialog box, enter the applicable responses.
8. Continue to add/save responses as needed. When you are finished, click **Close**.
The Add List Name and Responses dialog box appears with responses listed.
9. Click **Close**.
The Clinical Data Edit dialog box appears with the new Clinical Data List.
10. Click **OK**.

11. If you changed the CDC to Single or Multiple, click **Yes** in the Categories dialog box that appears.
12. In the Clinical Data dialog box, click **Close**.

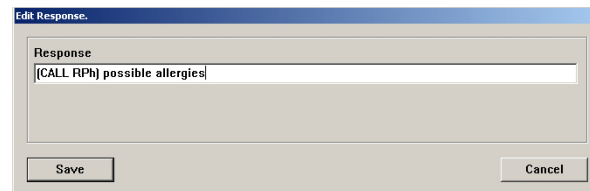
Editing a multiple-response list

The following procedure explains how to update response lists.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, select the CDC name and click **Edit**.
3. In the Clinical Data Edit dialog box, click **Edit Responses**.



4. In the View/Modify Responses dialog box, update the **Name**, if applicable.
5. Select the response to update and click **Edit**.
6. In the Edit Response dialog box, update the response and click **Save**.



7. In the View/Modify Responses dialog box, click **Close**.
8. In the Clinical Data Edit dialog box, click **OK**.
9. In the Clinical Data dialog box, click **Close**.

Deleting a response from a multiple-response list

The following procedure explains how to delete response lists.

1. Select **System Setup > Clinical Data**.
2. In the Clinical Data dialog box, select the CDC name and click **Edit**.
3. In the Clinical Data Edit dialog box, click **Edit Responses**.

4. In the View/Modify Responses dialog box, select the response to remove and click **Delete**.

View/Modify Responses.

List

Name

Reason for Return

Save

Responses

Pt asleep
Pt nauseated
Pt off floor
Pt refused
Titrated dose

Add Edit Delete

Close

5. In the confirmation message, click **YES**.
6. Click **Close** to return to the Clinical Data Edit dialog box.
7. To return to the standby dialog box, click **OK**.

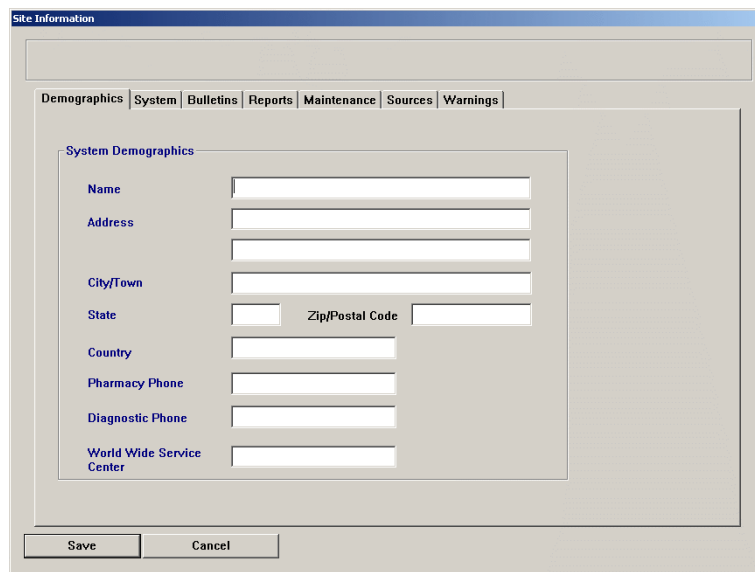
Site-specific options

The Pyxis MedStation system allows you to define information related to your facility's demographics, system options, and report and database maintenance options. The system uses this information for report headings and for various system options and default values.

Specifying demographic information

Use the Demographics tab to enter information about your facility.

1. Select **System Setup > Site Specific Options**.
2. On the Demographics tab of the Site Information dialog box, enter or edit the demographic information about your facility.



The screenshot shows a window titled "Site Information" with a tabbed interface. The "Demographics" tab is selected. The "System Demographics" section contains the following fields:

- Name:
- Address:
- City/Town:
- State: Zip/Postal Code:
- Country:
- Pharmacy Phone:
- Diagnostic Phone:
- World Wide Service Center:

At the bottom of the dialog are "Save" and "Cancel" buttons.

3. Enter your facility's name, address, and other demographic information on the Demographics tab.
4. On the same tab, enter your pharmacy's phone number and the phone number set up for remote diagnostics.

This information is used by CareFusion to access your Pyxis MedStation system should you have any questions or problems.

5. Click **Save**.
6. In the confirmation message that appears, click **OK**.

Specifying system options

System Options are global settings and are not retroactive.

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

- In the Site Information dialog box, click the **System** tab to enter the system options for your facility.

- Enter the applicable information:
 - Form Feed**—Advances the paper to the next page, select this box.
 - Expire Initial Password**—Forces a 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. In addition to enabling this option, enable Outdate Tracking at the pocket level.
 - 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. This information appears at both the console and station.
 - 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 (Pyxis Procar) holds charges for manually entered patients. This allows you to edit the patient data and pass the charges with the updated patient information. Set the value to 0 to prevent the ADT and billing information from being held.
 - Password Expiration**—Indicates the length of time that the password remains valid after the first log on or after you change your password. This expiration time affects both the console and all stations.
 - Minimum Password Length**—This affects only new passwords, not existing ones. Typically, the length is at least three characters.
 - 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. If you enter a value here, you are warned if you do not follow this template when you manually enter a patient ID at the station or console.
 - **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 message that appears, click **OK**.

Configuring an attention notice (bulletin)

Attention notices are displayed at the console and are a quick way for getting critical information. If you set them to display, you should designate someone to periodically check the console dialog box.

NOTE

An attention notice displays on the console dialog box. A bulletin is an attention notice that prints from the printer.

Attention notices are preceded by a plus (+) or a minus (-) sign. Those preceded by a plus sign have subentries. Click the plus sign to view the subentries. The number to the right of the attention notice indicates the number of notices of that type. The following background colors are also used:

- **Yellow**—Indicates that a stockout has occurred, an RxCheck is required, an item is critically low, a critical override has occurred, or bulletins have been posted.
- **Orange**—Indicates that an interface is behind on processing interactions, that communication with a device is unavailable, or that a device has a drawer failure.
- **Red**—Indicates that an interface is unavailable or disk space is running low.

The attention notices (bulletins) are as follows:

- *Activating an optional type of attention notice on page 108*
- *Addressing an unsolicited attention notice on page 110*

Activating an optional type of attention notice

You can toggle the display of the following types of notices: Stock Out, Stock Critical Low, Rx Check, Discrepancy, Ordered Med Not Loaded, NCR Bulletins, and Temperature Out of Range.

You cannot toggle other types of notices. In the ideal state, the notice does not appear by default.

To activate optional attention notices

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Bulletins** tab to activate bulletin options for your facility.

The screenshot shows the 'Site Information' dialog box with the 'Bulletins' tab selected. The 'Attention Notices' section contains a table with columns for 'Display', 'Print', and 'Destination'. The 'Discrepancy' and 'NCR Bulletin' rows have their 'Display' checkboxes checked. The 'Save' and 'Cancel' buttons are at the bottom.

	Display	Print	Destination
Stock Out	<input type="checkbox"/>	<input type="checkbox"/>	
Stock Critical Low	<input type="checkbox"/>	<input type="checkbox"/>	
Rx Check	<input type="checkbox"/>	<input type="checkbox"/>	
Discrepancy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ordered Med Not Loaded (Allow Equivalencies)	<input type="checkbox"/>	<input type="checkbox"/>	
NCR Bulletin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Temperature Out of Range	<input type="checkbox"/>	<input type="checkbox"/>	

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 should 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. This box is shaded until Ordered Med Not Loaded is checked.
 - **NCR Bulletin**—Used to notify the customer if an issue had arisen with the billing port.
 - **Temperature Out of Range**—Notifies you that the Pyxis® SMART Remote Manager's temperature is out of range.
4. Click **Save**.
5. In the confirmation dialog box that appears, click **OK**.

Addressing an unsolicited attention notice

Unsolicited attention notices, unlike the optional ones in the previous section, are notices that you do not request. They are displayed whenever a special condition occurs, such as a communications failure.

The following table lists the types of unsolicited attention notices:

Attention Notice	Description
Can't Communicate	Shows an attention notice that includes: <ul style="list-style-type: none">• The last time the device linked to the console.• The station that stopped communication.
Drawer Failures	Shows the following failure information: <ul style="list-style-type: none">• Drawer/cube/pocket number.• The time of the failure.• The name of the device where the failure occurred.
Console Modules Down	Lists the console modules that are not running.

Report and maintenance options

The report and maintenance options are as follows:

- *Selecting report options* on page 110
- *Specifying maintenance options* on page 112
- *Running a maintenance task* on page 114
- *Customizing the console name* on page 114
- *Viewing or modifying a medication warning* on page 115

Selecting report options

The following procedure explains how to select reporting options.

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Reports** tab to enter the report options for your facility.
3. In the Report Time box, enter the time at which the reporting period should begin.

NOTE

The report time specifies the start time of the 24-hour reporting period for all console reports. Note that this is not the time the report begins generating, but the beginning of the time frame covered by the report.

The screenshot shows the 'Site Information' dialog box with the 'Reports' tab selected. The 'Time Options' section contains two time pickers: 'Report Time' set to 00:00 and 'Ordered Meds Not Loaded report looks' set to 00:00 in the future for orders. The 'Report Options' section has five checkboxes: 'Sort Console Activity Reports By ID (default by Name)' (checked), 'Suppress User ID on Station & Console Reports' (unchecked), 'Show Cost/Charge Info on Inventory by Station and Hosp. Wide Med Summary Reports' (checked), 'Show Charge Info on Console Billing Summary and Charges & Credits Reports' (checked), and 'Exclude "UNKNOWN" meds from Ordered Meds Not Loaded Report' (unchecked). Below this are four sections: 'Inventory' (checked for Brand Name and Units of Issue), 'System' (checked for Brand Name and Alt ID), 'Activity' (checked for Brand Name and Alt ID), and 'System Activity' (checked for Brand Name). 'Save' and 'Cancel' buttons are at the bottom.

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. Note that this is not the time the report begins generating, but the beginning of the time frame covered by the report.
 - **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 medication 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 message that appears, click **OK**.

Specifying maintenance options

Use the Maintenance page to specify the time period of data available to console reports and the maintenance schedule for each maintenance task. You can also use it to begin running maintenance at any time, even if it is not scheduled.

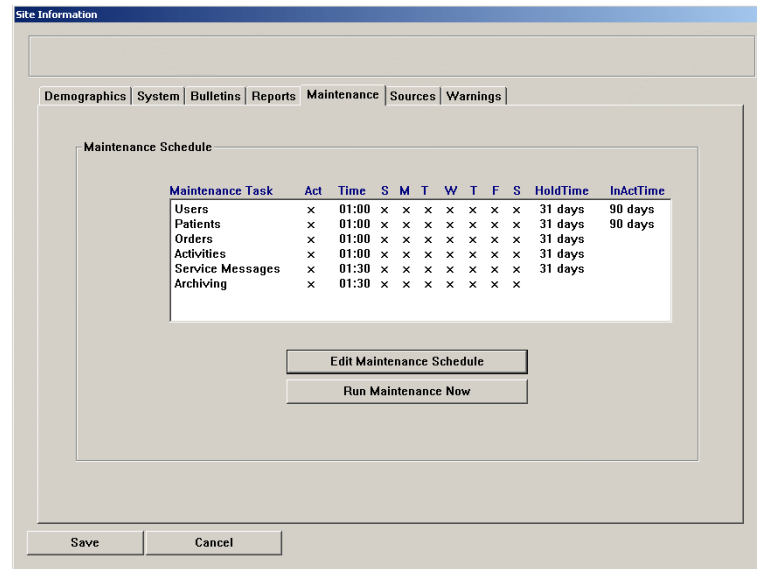
NOTE

Do not change the Maintenance options without assistance from a CareFusion representative.

Option	Description
Users	Deletes expired users from the system.
Patients	Searches the database for patients that have had no transactions for a period longer than that specified in the Discharge if Inactive for field described later in this section. Patients that have been inactive for longer than this time are discharged. This task also deletes discharged patients that have been in the database longer than the hold time.
Orders	Profile mode only.
Activities	Transaction activities that have been in the database longer than the hold time are deleted.
Service Messages	Service messages that have been in the database longer than the hold time are deleted.
Archiving	Generates new archive files, deletes old archive files from the hard drive, and updates the archive file Date field in the Archiving dialog box. For more information on this process, see <i>Scheduling archive maintenance</i> on page 154.

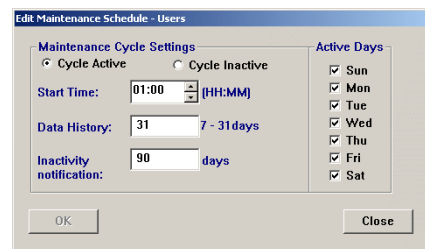
To specify maintenance options

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, 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**.

The applicable Edit Maintenance Schedule dialog box appears, showing the maintenance schedule and options for the selected task. This dialog box varies slightly depending on which maintenance task you selected.



5. In the **Start Time** box, enter the time that the maintenance cycle should 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.

NOTE

The task runs on the days that you specify, unless you indicate that the cycle is inactive. A maintenance cycle is inactive if you select Cycle Inactive. This means that the maintenance cycle does not run, but allows you to keep the settings for future use.

Select Cycle Active to run the cycle at the time and days specified.

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. Set this value greater than or equal to the activities hold time set at the Devices dialog box.
 - **Inactivity notification** (Users maintenance)—Enter the number of days after which a service message is logged for users who have not performed any transactions. To review a list of service messages, run the Service Messages report. If a service message is listed that indicates a specific number of users have been inactive for a specific number of days, you can then run the Users report using the User Last Access parameter to produce a detailed list of inactive users. (For more information, refer to the *Pyxis MedStation 4000 System Console Reports Booklet*.)
9. To save your changes, click **OK** and then click **Save**.
10. In the confirmation message that appears, click **OK**.

Running a maintenance task

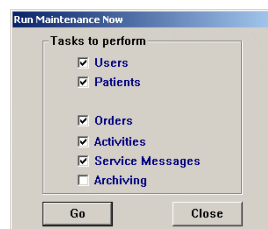
Rather than waiting for the scheduled time for a particular maintenance task, you can choose to run it immediately.

NOTE

Do not change the Maintenance options without assistance from a CareFusion representative.

To run a maintenance task

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Maintenance** tab.
3. Select the maintenance task.
4. Click **Run Maintenance Now**.
5. In the Run Maintenance Now dialog box, select the maintenance tasks and click **Go**.



Customizing the console name

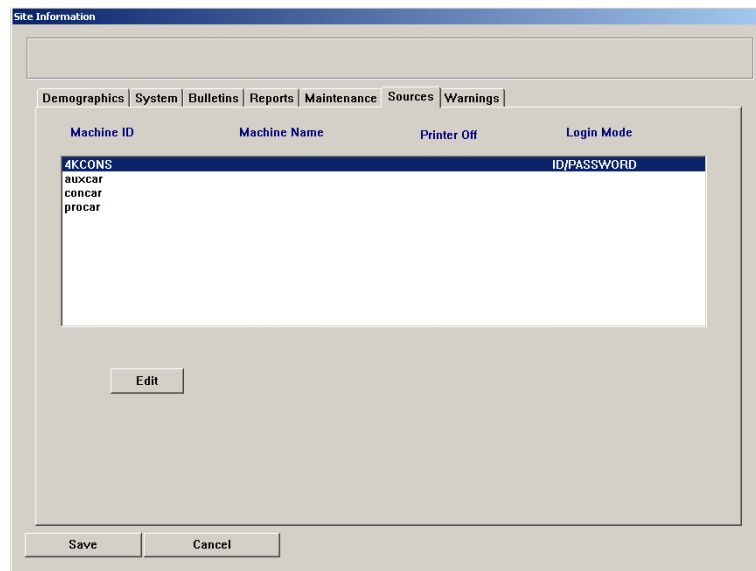
The Sources page allows you to provide an alias for the console. This alias name is the name that appears in selection lists or reports.

NOTE

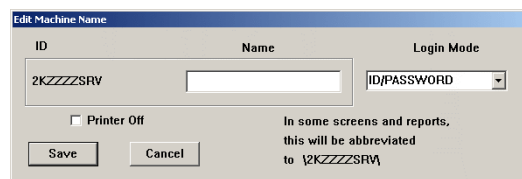
Do not change the Maintenance options without assistance from a CareFusion representative.

To customize the console name

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Sources** tab.
3. Select the console to edit.
4. Click **Edit** to change the name of the console.



5. In the Edit Machine Name dialog box, update the name of the console and click **Save**.



6. Click **Save** again.
7. When the confirmation message appears, click **OK** to return to the standby dialog box.

The new name now appears in reports and selection lists that list console names.

Viewing or modifying a medication warning

The purpose of the warning is to inform you that the requested medication should not be removed because it would be too early or too late compared to the order dose time, or too close compared to the previous removal. Too Close dialog box warnings display for non-profile stations because the warning is comparing

removal times to that of the previous removal, rather than to the due time of the medication.

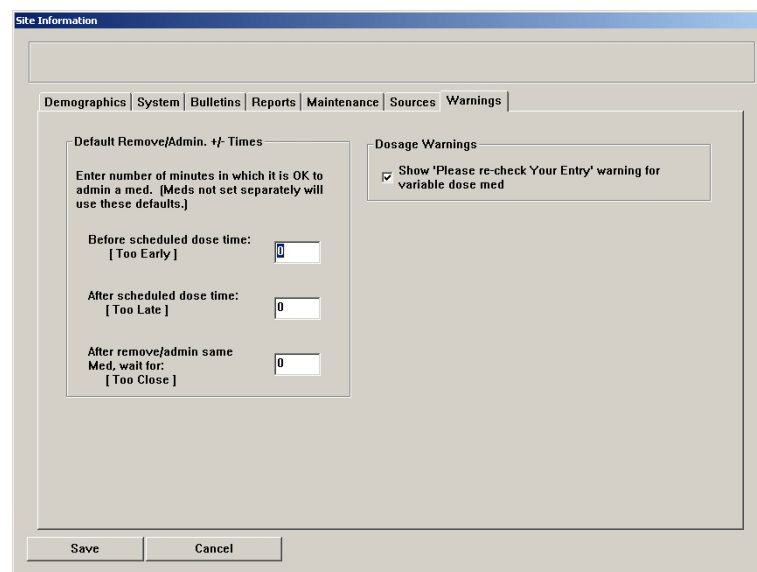
Too Early and Too Late dialog box warnings display at profile stations. Although you might have administered the medication, the warning is more specific to the formulary order. With this warning functionality, a dose time list appears after you select the medication. This list defaults to the most current dose time, but also shows other available dose times that have already been removed, are past due, or are scheduled.

In an environment where more than one Nurse is caring for the same patient, it is recommended to use medication warnings (too close) as a potential aid in the prevention of duplicate doses being removed from the MedStation.

These settings can be overridden by settings on the Formulary tab for individual medications.

To view or modify warnings

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Warnings** tab.



The screenshot shows the 'Site Information' dialog box with the 'Warnings' tab selected. The dialog has a title bar 'Site Information' and a menu bar with 'Demographics', 'System', 'Bulletins', 'Reports', 'Maintenance', 'Sources', and 'Warnings'. The main content area is divided into two sections: 'Default Remove/Admin. +/- Times' and 'Dosage Warnings'. The 'Default Remove/Admin. +/- Times' section contains three input fields: 'Before scheduled dose time: [Too Early]' with a value of 0, 'After scheduled dose time: [Too Late]' with a value of 0, and 'After remove/admin same Med, wait for: [Too Close]' with a value of 0. The 'Dosage Warnings' section contains a checked checkbox labeled 'Show 'Please re-check Your Entry' warning for variable dose med'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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 message appears, click **OK** to return to the standby dialog box.

Pharmacy configuration

You can customize the contents of some of the pick lists from which you select data on the console or station. Thus you can use terminology that is familiar and in practice at your facility or pharmacy, or that is based on your policies and procedures. For example, your facility might prefer specific terminology for security groups, override groups, formulary classifications, discrepancy resolution reasons, and other formulary data fields. If your facility does not currently have a standard for naming these items, this section describes how and why you can establish them.

Customizing a security group name

Each formulary item defined in the console must have one of 10 security groups associated with it.

This security group is a tool for controlling which medications your users access when you assign them security group privileges. For example, if you want to remove a medication, and the medication is assigned to security group A (associated with Schedule II drugs), you need access to security group A. The system is installed with default security group names, which you can rename to customize your system.

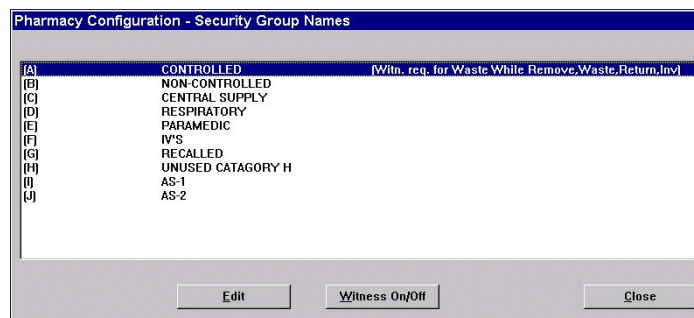
NOTE

Override groups are used without a Pharmacist-verified order and based on the patient situation or condition.

To rename the default security group name

1. Select **System Setup > Pharmacy Configuration > Security Group Names**.

The Pharmacy Configuration – Security Group Names dialog box appears with the names of the default or existing security group names appear.



If a witness is required for a security group, the words *[Witn. req. for Waste While Remove, Waste, Return, Inv]* appear to the right of that security group. This means a witness is required when wasting, returning, and inventorying medications.

NOTE

To toggle a security group's witness required field on or off, select the security group name and then click the Witness On/Off button.

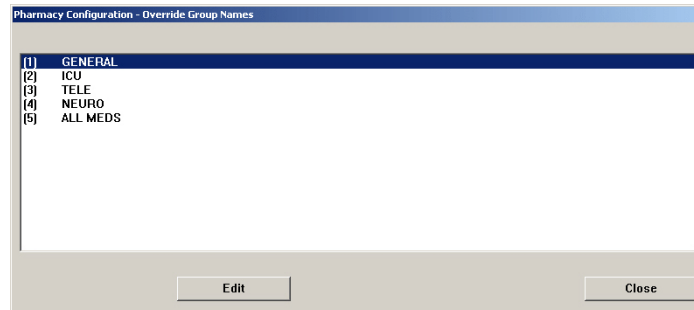
2. Select the security group name and click **Edit**.
3. In the Security Group Name Edit dialog box, enter the new security group name in the **Group Name** box and click **Save**.
4. Click **Close**.

Customizing an override group name

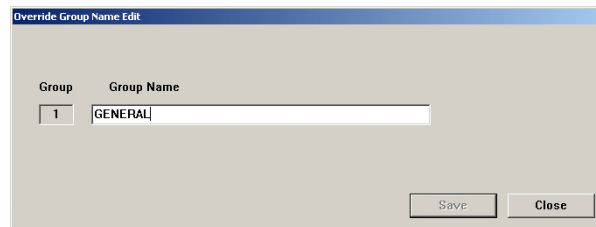
When running the Pyxis MedStation system, you can customize the names of override groups. An override group is assigned to medications in the formulary. You can also assign override groups to stations, pockets, and users. This topic describes how to customize override group names.

1. Select **System Setup > Pharmacy Configuration > Override Group Names**.

The Pharmacy Configuration – Override Group Names dialog box appears, displaying the names of the default or existing override groups in a list.



2. Select a name to update and click **Edit**.
3. In the Override Group Name Edit dialog box, enter the new name in the **Group Name** box and click **Save**.



4. To return to the standby dialog box, click **Close**.

Adding or changing a medication-classification name

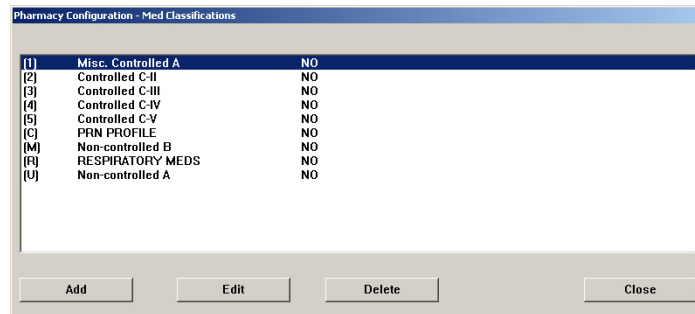
The system is installed with default classification names (DEA classifications), which you can change to customize your system. You can also add new medication classifications. You can sort reports by medication classification. You can delete new classifications but not installed ones.

- *Renaming a medication classification on page 119*
- *Adding a medication classification on page 120*
- *Deleting a medication classification on page 121*

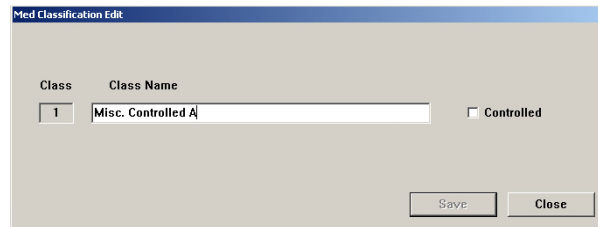
Renaming a medication classification

The following procedure explains how to change the name of a medication classification.

1. Select **System Setup > Pharmacy Configuration > Med Classifications**.
The Pharmacy Configuration – Med Classifications dialog box appears, listing all medication classifications that are currently defined.



2. Select the classification that you want to rename and click **Edit**.
3. In the Med Classification Edit dialog box, enter the new medication-classification name in the **Class Name** box and click **Save**.



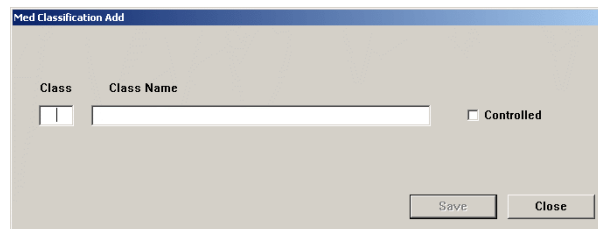
The controlled check box determines Accessed Inventory.

4. Click **Close**.

Adding a medication classification

The following procedure explains how to add a medication classification.

1. Select **System Setup > Pharmacy Configuration > Med Classifications**.
2. In the Pharmacy Configuration – Med Classifications dialog box, click **Add**.
3. In the Med Classification Add dialog box, 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**.

Deleting a medication classification

You can delete new classifications but not preinstalled ones. The following procedure explains how to delete a medication classification that your facility has added.

1. Select **System Setup > Pharmacy Configuration > Med Classifications**.
2. In the Pharmacy Configuration – Med Classifications dialog box, select the applicable classification and click **Delete**.
3. In the confirmation dialog box that appears, click **YES**.
4. To return to the standby dialog box, click **Close**.

Adding or modifying a discrepancy-resolution reason

The Pyxis MedStation system is installed with default discrepancy-resolution reasons that you might find useful in your system. These reasons appear at the station for you to choose from when resolving discrepancies. You can add to this list of reasons or modify existing reasons based on your facility's policies and procedures. The changes you make appear at the stations.

When compiling your list of reasons, remember that the first seven reasons are visible at the station without scrolling. Also, regardless of how many reasons you add, the care providers have the option of typing in their own reasons at the station.

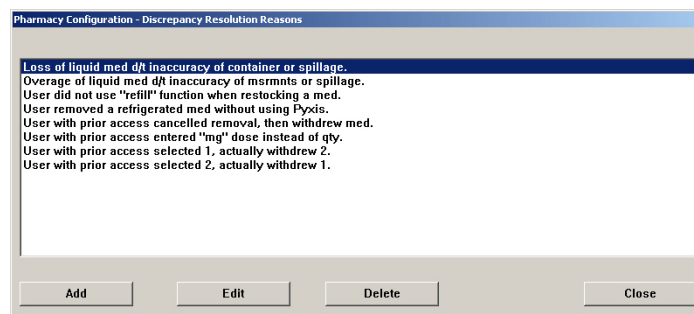
This section includes the following topics:

- *Adding a discrepancy-resolution reason on page 121*
- *Editing a discrepancy-resolution reason on page 122*
- *Deleting a discrepancy-resolution reason on page 122*

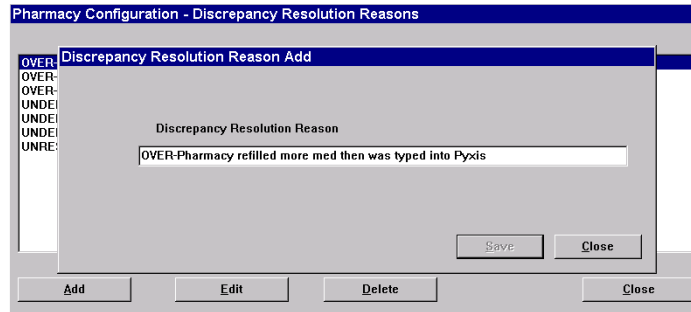
Adding a discrepancy-resolution reason

The following procedure explains how to add a reason.

1. Select **System Setup > Pharmacy Configuration > Discrepancy Resolution Reasons**.
2. In the Pharmacy Configuration – Discrepancy Resolution Reasons dialog box, click **Add**.



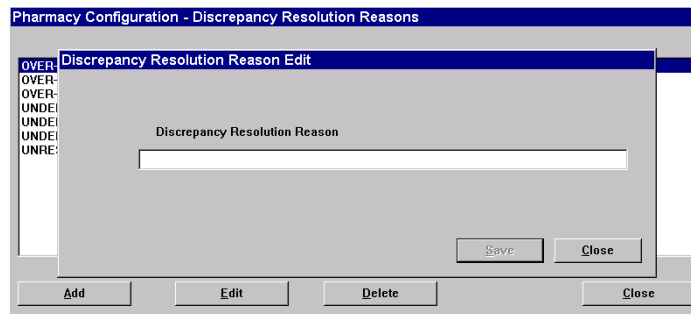
3. In the Discrepancy Resolution Reasons Add dialog box, enter the new reason (up to 60 characters) in the **Discrepancy Resolution Reason** box and click **Save**.



Editing a discrepancy-resolution reason

The following procedure explains how to a update reason.

1. Select **System Setup > Pharmacy Configuration > Discrepancy Resolution Reasons**.
2. In the Pharmacy Configuration Discrepancy Resolution Reasons dialog box, select the applicable reason and click **Edit**.
3. In the Discrepancy Resolution Reasons Edit dialog box, update the text in the Discrepancy Resolution Reason box with your new reason and click **Save**.



Deleting a discrepancy-resolution reason

The following procedure explains how to a delete reason.

1. Select **System Setup > Pharmacy Configuration > Discrepancy Resolution Reasons**.
2. In the Pharmacy Configuration Discrepancy Resolution Reasons dialog box, select the applicable reason and click **Delete**.
3. In the confirmation dialog box that appears, click **YES**.
4. To return to the standby dialog box, click **Close**.

Adding, updating, or deleting a formulary or station list

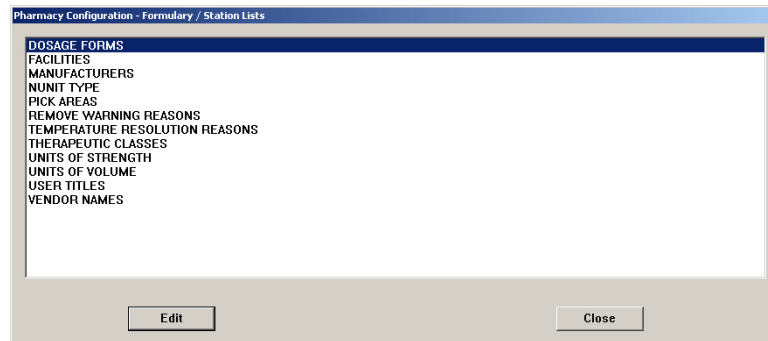
When you define or modify a formulary item or a station, certain fields require you to make a selection from a list of choices. The console allows you to customize the contents of the lists.

Examples of customized lists are units of measure or volume, manufacturers of medications, nursing unit types, pick areas, and therapeutic classes.

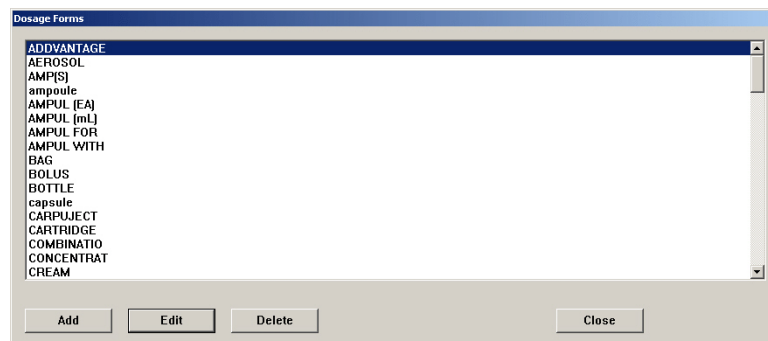
Adding an item to a list

The following procedure explains how to add items to a list.

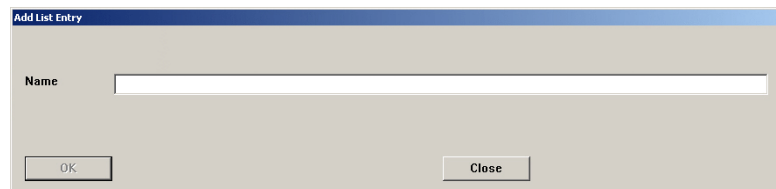
1. Select **System Setup > Pharmacy Configuration > Formulary/Station Lists**.
2. In the Pharmacy Configuration – Formulary/Station Lists dialog box, select a list name and click **Edit**.



3. In the dialog box 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 dialog box, enter the new item and click **OK**.

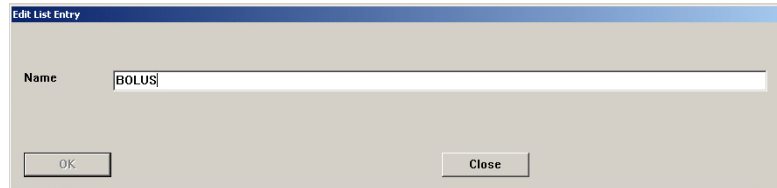


5. To return to the standby dialog box, click **Close**.

Editing a list

The following procedure explains how to update a list.

1. Select **System Setup > Pharmacy Configuration > Formulary/Station Lists**.
2. In the Pharmacy Configuration – Formulary/Station Lists dialog box, select an item and click **Edit**.
3. In the dialog box 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 dialog box, update the applicable information and click **OK**.



5. Click **Close**.
6. To return to the standby dialog box, click **Close**.

Deleting an item from a list

The following procedure explains how to delete a list item.

1. Select **System Setup > Pharmacy Configuration > Formulary/Station Lists**.
2. In the Pharmacy Configuration – Formulary/Station Lists dialog box, select the list name containing the item to delete.
3. Click **Edit**.
4. In the list that appears, select the item that you want to remove and click **Delete**.
5. When the confirmation message appears, click **Yes** to delete the entry.
6. To return to the standby dialog box, click **Close** and then click **Close** again.

Maintaining scan codes

If the scan codes option is set to On, scan codes are maintained at the console via pharmacy configuration. The Scan Code dialog box lists all items in the table by scan code number within generic medication name. The table also includes a quantity and a vendor name for each item. Scan codes and medication IDs have a many-to-one relationship: multiple scan codes can map to the same medication ID.

Scan Code Maintenance allows you to manually enter the scan code or scan the barcode from the medication packaging.

When you add a new scan code or edit the fields for quantity or vendor name, the console sends a message to the stations and the Pyxis Procar, which updates their respective local tables. When you delete a scan code, the console sends a message to the stations and the Pyxis Procar, which delete the code from their scan codes tables.

Adding a scan code

The following procedure explains how to associate a scan code with a formulary item.

1. In the menu bar, click **System Setup > Pharmacy Configuration > Scan Code Maintenance**.
2. Click **Add**.
3. When the Pharmacy Configuration – Scan Code Maintenance dialog box appears, scan or manually enter the new code. This scan code must not be previously associated with any formulary items.

Pharmacy Configuration - Scan Code Maintenance

Scan Code Information

Scan Code:

Qty: NDC:

Vendor Name:

Med Description

Med ID:

Generic Name:

Brand Name:

Scan Codes Mapped with Above Med ID

Scan Code	Qty	Vendor Name

NOTE

Scan code associations are unit dose based. The recommended quantity equals one, as this affects the quantity selected during Scan on Remove.

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.

NOTE

The National Drug Code (NDC) box is automatically entered if an NDC is recognized by the system when the scan code is read. You can also manually enter the NDC in this box. A dialog box appears to confirm that the NDC appears. If needed, you can enter the NDC code manually.

Scanning the barcode extracts the NDC portion of the barcode. The confirm NDC value dialog box appears.

6. Click **Yes** to confirm.
7. Click **Save**.
8. Click **Close**.
9. To return to the standby dialog box, click **Close**.

Editing a scan code

After a scan code is assigned to a formulary item or medication ID in the scan codes table, you can edit the quantity, vendor name, and scan code fields but not the medication ID in the record. Vendor field can be left empty.

1. In the menu bar, select **System Setup > Pharmacy Configuration > Scan Code Maintenance**.
2. In the Scan Code dialog box, select the applicable item and click **Edit**.
3. When the Pharmacy Configuration – Scan Code Maintenance dialog box appears, update the desired field and click **Save**.
4. To return to the standby dialog box, click **Close**.

Deleting a scan code

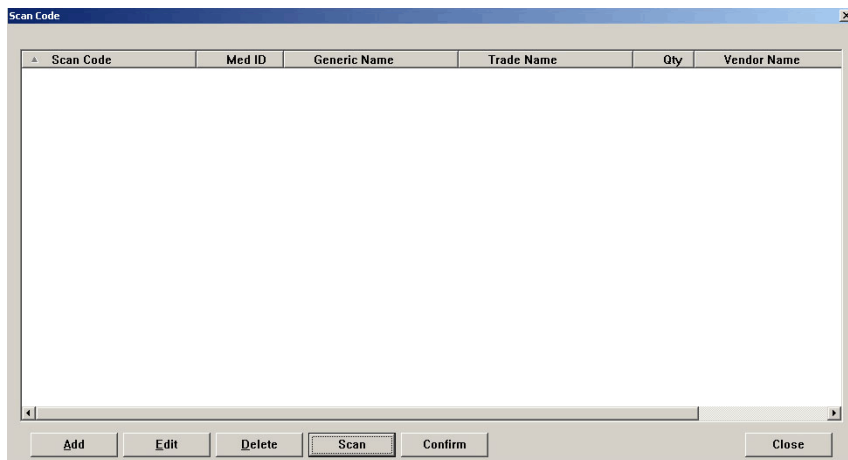
1. In the menu bar, click **System Setup > Pharmacy Configuration > Scan Code Maintenance**.
2. In the Scan Code dialog box, select the applicable item and click **Delete**.
3. In the confirmation message, click **Yes** to delete the item.
4. To return to the standby dialog box, click **Close**.

Using scan code for a quick search

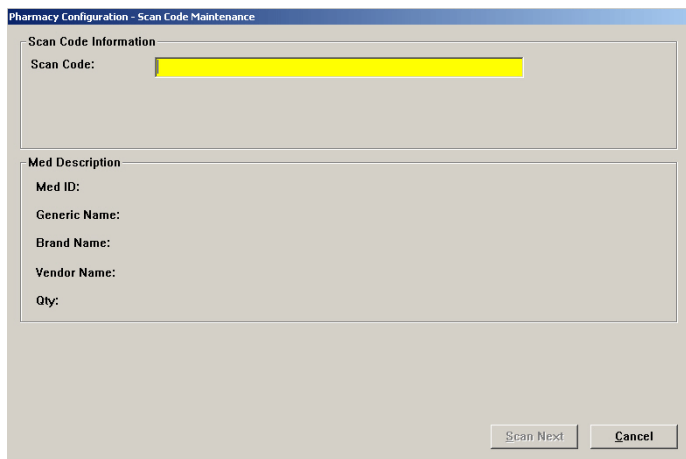
Use this feature to determine if a scan code number is already in your system.

1. In the menu bar, click **System Setup > Pharmacy Configuration > Scan Code Maintenance**.

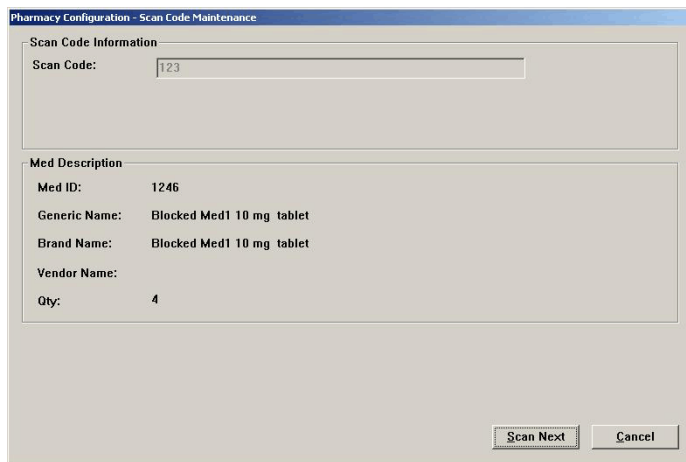
- In the Scan Code dialog box, click **Scan**.



- Scan the scan code number.

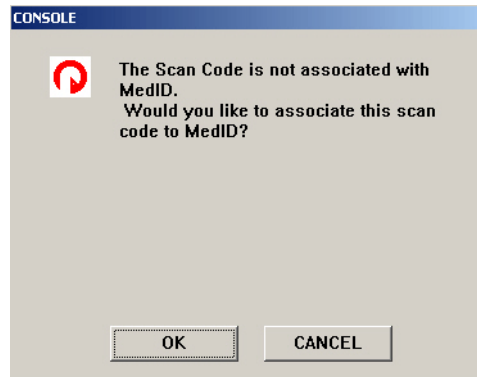


- If the number is already in the system, the following dialog box appears.



This shows you the medication and its properties. You can continue to check scans by clicking **Scan Next**. If you are finished, click **Cancel**.

- If the scan code is not in the system, click **OK** to associate the scan code with a medication in MedID.

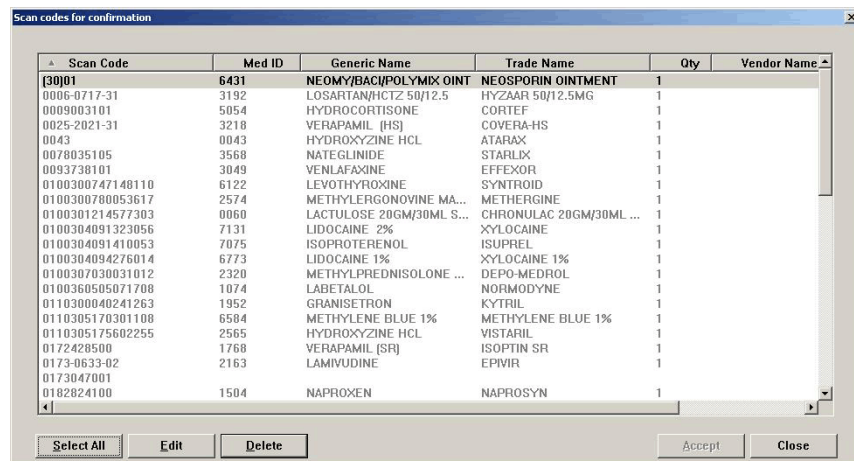


- The Pharmacy Configuration - Scan Code Maintenance dialog box appears. Click **Select Med...** to associate a medication with the barcode you entered. You can type a name in the Search > Med Generic Name box or you can use the scroll bar to find the medicine. Highlight the medicine name and click **Select**. The Pharmacy Configuration - Scan Code Maintenance dialog box appears but with the Med Description section filled in. Click **Save**. You are returned to the original Pharmacy Configuration - Scan Code Maintenance dialog box to search again, if needed. Click **Cancel** if you are finished. Then click **Close** to return to the main dialog box.

Confirming items

Use this feature to confirm medication barcodes at the console.

- In the menu bar, click **System Setup > Pharmacy Configuration > Scan Code Maintenance**.
- In the Scan Code dialog box, click **Confirm**. The Scan codes for confirmation dialog box appears.



- Highlight the medication to confirm. Click **Accept**. Multiple medications can be confirmed at the same time. Use **CTRL + SHIFT** or **Select All** to select more medications.

4. Click **Close** to return to the main dialog box.

Communication status

The Communication Status (CommStatus) menu allows you to view information about the communication between the console and the attached devices, including stations. This feature is used mainly by CareFusion representatives for troubleshooting. However, a representative might ask you to access this option to review information.

Viewing specific communication information

The following procedure explains how to view information about the station and console communications.

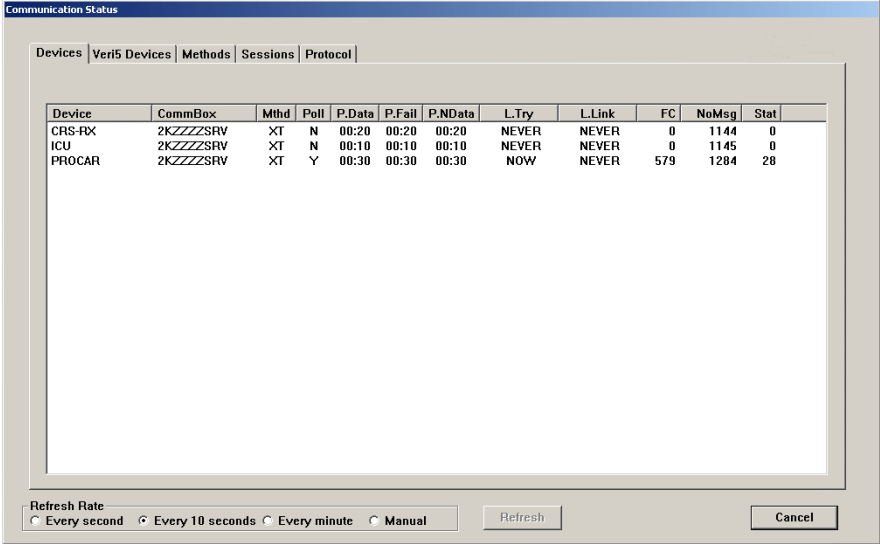
1. In the menu bar, select **CommStatus**.
2. Click the applicable tab, depending on which information you want to view.

The following describes the information available for each tab:

- **Devices**—Displays a list of devices with which the console is communicating.

NOTE

A device is any piece of equipment that communicates directly with the console, such as a station. For each device listed, this option specifies the last time it communicated with the console (if ever) and how many messages are queued for the console.



The screenshot shows the 'Communication Status' window with the 'Devices' tab selected. The window contains a table with the following data:

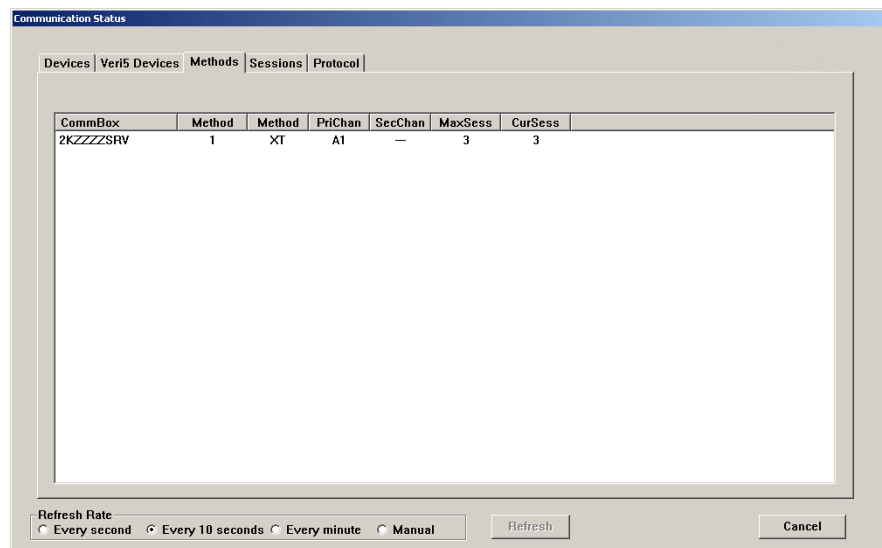
Device	CommBox	Mthd	Poll	P.Data	P.Fail	P.NData	L.Try	L.Link	FC	NoMsg	Stat
CRS-RX	2KZZZSRW	XT	N	00:20	00:20	00:20	NEVER	NEVER	0	1144	0
ICU	2KZZZSRW	XT	N	00:10	00:10	00:10	NEVER	NEVER	0	1145	0
PROCAR	2KZZZSRW	XT	Y	00:30	00:30	00:30	NOW	NEVER	579	1284	28

At the bottom of the window, there is a 'Refresh Rate' section with radio buttons for 'Every second', 'Every 10 seconds' (selected), 'Every minute', and 'Manual'. There are also 'Refresh' and 'Cancel' buttons.

The fields are:

- **Device**—Identifies a device. A device is any piece of equipment which communicates directly with the console, such as a station.
- **CommBox**—Specifies which communications PC this device is configured to communicate with.
- **Mthd**—The communication method of the device.

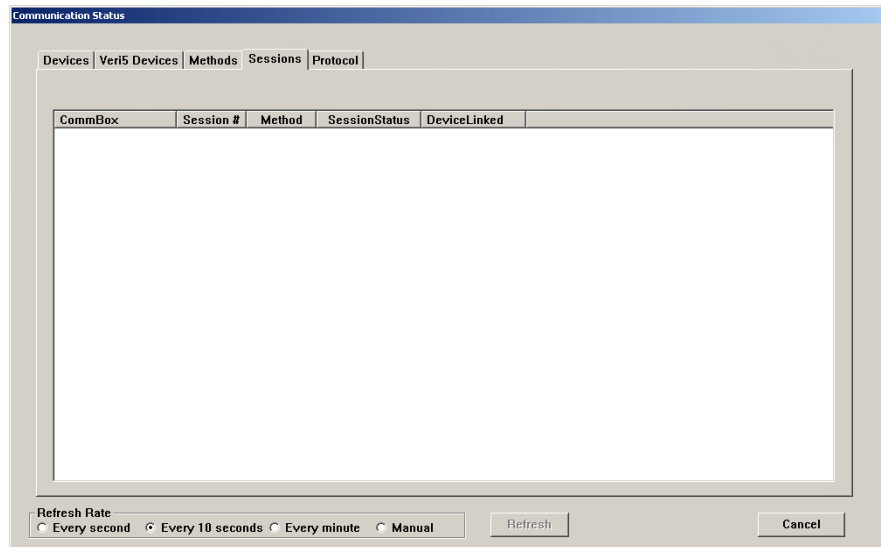
- **Poll**—This field indicates two values. The Y or N indicates whether polling is on or off. The numeric value is the number of seconds between the last poll and the next poll.
- **P.Data**—Polling time interval, if there is data at the console for the station.
- **P.Fail**—Polling time interval, if the station is not responsive to communication (fails to communicate).
- **P.NData**—Polling time interval, if the station is communicating but the console has no data for it.
- **L.Try**—The day and time that the device was last polled by the console.
- **L.Link**—Last day and time that the device successfully linked with the console.
- **FC**—This is the failure count. The number of successive times that communication has failed between the device and the console. A high count indicates something more than an occasional or incidental communication failure and requires your immediate attention.
- **NoMsg**—The number of messages that the console has temporarily stored on disk for transmission to the device. This number is normally zero, but it might increment if overall traffic is heavy or if the stations are offline.
- **Stat**—Indicates how many messages are in the queue which have not cleared yet.
- **Methods**—Displays the status of the communication methods in use.



The fields are:

- **CommBox**—Specifies which communications PC this device is configured to communicate with.
- **Method**—Method type.
- **Method**—Shows specific information about the method level.

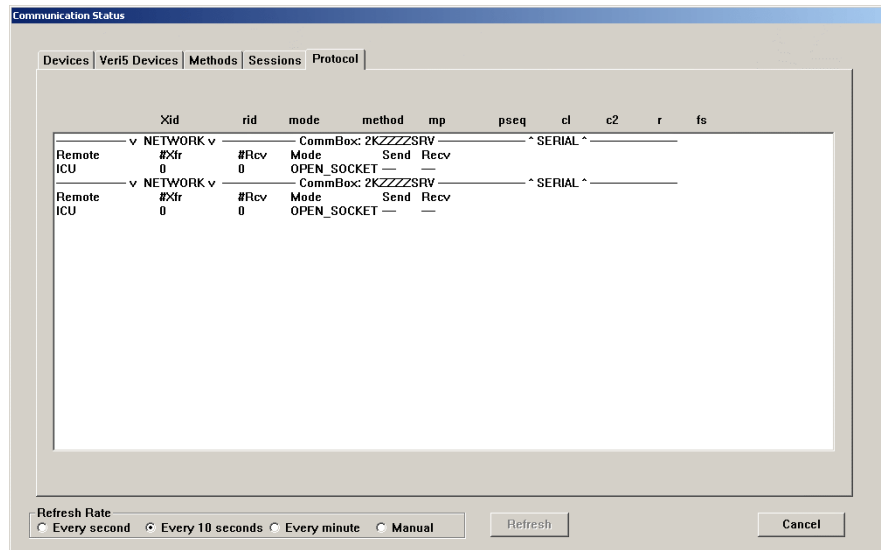
- **PriChan**—Primary channel for communication for this method, such as a communications (COM) port or network adapter number.
- **SecChan**—Secondary channel for communication for this method and is not currently supported.
- **MaxSess**—Maximum number of sessions allowed for this method.
- **CurSess**—Number of currently active sessions.
- **Sessions**—Displays the session status for all methods.



The fields are:

- **CommBox**—Specifies which communications PC this device is configured to communicate with.
- **Session #**—Displays active sessions of communication between devices.
- **Method**—Method type.
- **SessionStatus**—Current stage in the session for this device.
- **DeviceLinked**—Identifies a device. A device is any piece of equipment which communicates directly with the console, such as a station.
- **Protocol**—Displays the network communication. The Protocol tab indicates the level of performance for each method. The information

provided on this dialog box is rarely used except in situations requiring in depth communication analysis.



- **Xid**—Name of the device polled.
- **rid**—Name of the device that is polling, usually the console.
- **mode**—Current step in the protocol.
- **method**—The method number. Numbering begins at “0”.
- **mp**—The first few characters of the message being sent.
- **pseq**—Packet sequence, the number of messages transmitted during the session.
- **c1**—First transmission retry counter that increments when a message packet transmission has an error. The packet is retransmitted until it is error-free or fails seven times and must abort.
- **c2**—Second transmission retry counter that increments when a message packet transmission has an error. The packet is retransmitted until it is error-free or fails seven times and must abort.
- **r**—Indicates the direction of transmission: T indicates communications to the polled device. F indicates communications from the device.
- **fs**—Finish status. The coded result of the last poll.

In the information box, the following items are included:

- **Remote**—Network does not run from a COM port.
- **#XFR**—Amount of messages to transmit to devices.
- **#Rcv**—Amount of messages received from devices.
- **Mode**—The state in which the sessions for the protocol reside. Will be shown as Idle, Listen_W, or Polling.
- **Send**
- **Recv**—Receive

Changing the refresh rate

The following procedure explains how to change the rate at which the information is updated.

1. In the menu bar, click **CommStatus**.
2. In the Refresh Rate section of the Communication Status dialog box, select the applicable setting: Every second, Every 10 seconds, Every minute, or Manual. This is a view-only dialog box in which you cannot make selections.

Chapter 4

Utilities

This section includes the following topics:

<i>Using virtual files edit to define communication ports</i>	<i>136</i>
<i>Updating information globally.....</i>	<i>139</i>
<i>Archiving transactions</i>	<i>149</i>

Using virtual files edit to define communication ports

Use the Virtual Files Edit feature to create the methods.cfg file for defining communication ports.

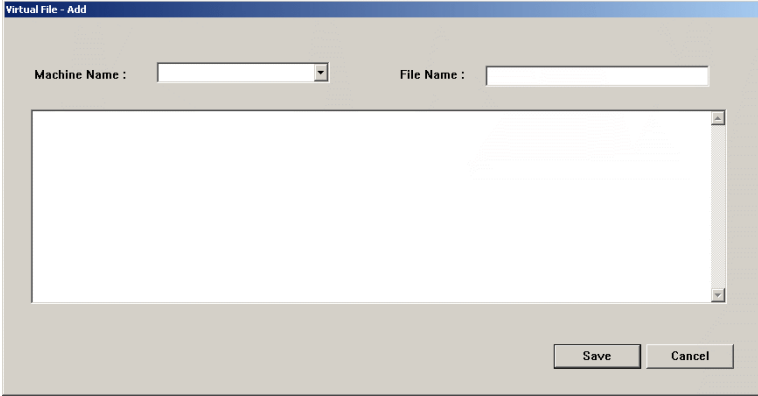
CAUTION

Do not use Virtual Files Edit without the assistance of a CareFusion representative.

Adding a virtual file

The following procedure explains how to add a configuration file.

1. Select **Utilities > Virtual Files Edit**.
2. In the Virtual Files dialog box, click **Add**.
3. In the Virtual File – Add dialog box, complete the following:
 - **Machine Name**—Select a computer from the list. These are computers on which the console and/or workstation are running.
 - **File Name**—Enter the name of the file.



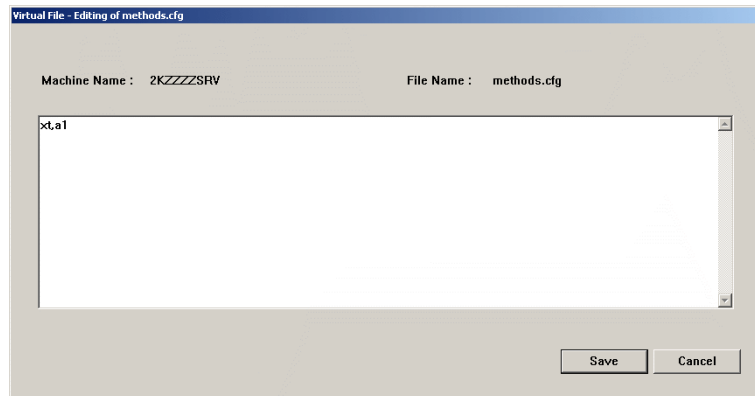
4. In the empty box, enter the communication information. In this environment, enter **XT**.
5. Click **Save**.
6. When the confirmation message appears, click **OK**.

Editing a virtual file

The following procedure explains how to update the communication information for an existing configuration file. (You cannot change the machine name; to change the file name, you must use the Rename option. See *Renaming a virtual file* on page 137.).

1. Select **Utilities > Virtual Files Edit**.
2. In the Virtual Files dialog box, select the file to update and click **Edit**.

3. In the Virtual File – Editing dialog box, update the communication information and click **Save**.



4. When the confirmation message appears, click **OK**.

Deleting a virtual file

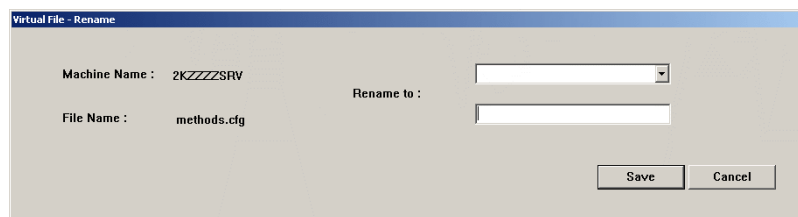
The following procedure explains how to delete a configuration file.

1. Select **Utilities > Virtual Files Edit**.
2. In the Virtual Files dialog box, select the file to remove and click **Delete**.
3. When the confirmation message appears, click **OK**.
4. When the next confirmation message appears, click **OK**.

Renaming a virtual file

The following procedure explains how to rename a configuration file.

1. Select **Utilities > Virtual Files Edit**.
2. In the Virtual Files dialog box, select the file to rename and click **Rename**.
3. In the Virtual File – Rename dialog box, complete the following:
 - **Machine Name**—Select a machine from the list.
 - **File Name**—Enter a new name for the file.

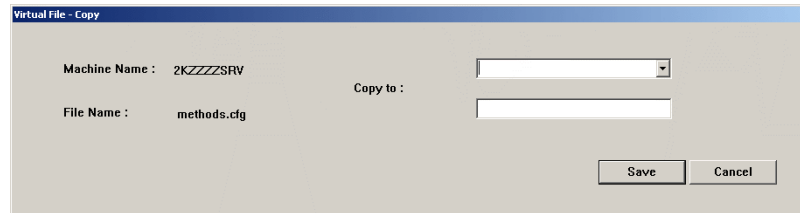


4. Click **Save**.
5. When the confirmation message appears, click **OK**.

Copying a virtual file

The following procedure explains how to copy an existing configuration file.

1. Select **Utilities > Virtual Files Edit**.
2. In the Virtual Files dialog box, select the file to rename and click **Copy**.
3. In the Virtual File – Copy dialog box, complete the following:
 - **Machine Name**—Select a machine from the list.
 - **File Name**—Enter the name of the file.



4. Click **Save**.
5. When the confirmation message appears, click **OK**.

Updating information globally

Editing the fields globally saves you the time of manually and separately editing each medication or station or user.

With the Pyxis MedStation system, you can control medication access by security group (and if the Profile option is on, also by override level). This provides you with an added layer of flexibility.

NOTE

For Pyxis Anesthesia System, all pended items must be loaded prior to performing any edits/global edits on those pended items.

Updating the formulary globally

Editing multiple medications requires you to specify the medications to edit, specify the new values for formulary data fields, specify the new values for formulary options, and apply the changes. For more information about these settings, see the applicable section under *Adding a formulary item* on page 40.

1. In the menu bar, click **Utilities > Global Edits > Formulary**.

The Global Formulary Edit dialog box appears with the Selection Criteria tab selected.

The screenshot shows the 'Global Formulary Edit' dialog box with the 'Selection Criteria' tab selected. The dialog contains several dropdown menus for filtering medications, including 'Generic Name' (set to '<all meds>'), 'Strength Units', 'Volume Units', 'Dosage Form', 'Therapeutic Classification', 'Med Class', 'Pick Area', and 'Manufacturer'. On the right, there is a 'Security' section with dropdowns for 'Security Group', 'Verify count', and 'Override Group'. A 'Review Selections' button is located below the Selection Criteria fields. A note box states: 'The selections you make here will determine which items are to be edited. Press the 'Review Selection' button to see which items are currently included in the edit group. Note: Blank fields will not be used in determining the items to be edited.' At the bottom are 'Continue' and 'Close' buttons.

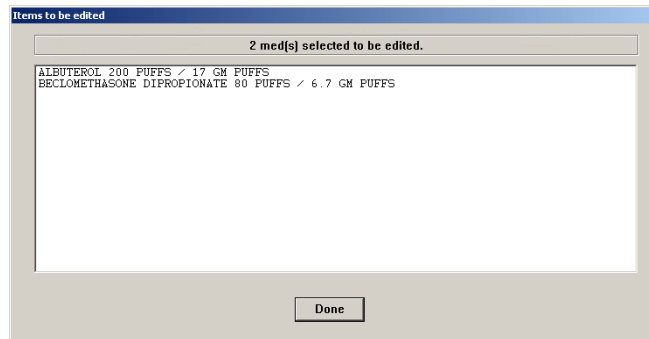
2. For each of the fields shown in the dialog box, select the values that determine the medications to edit.

NOTE

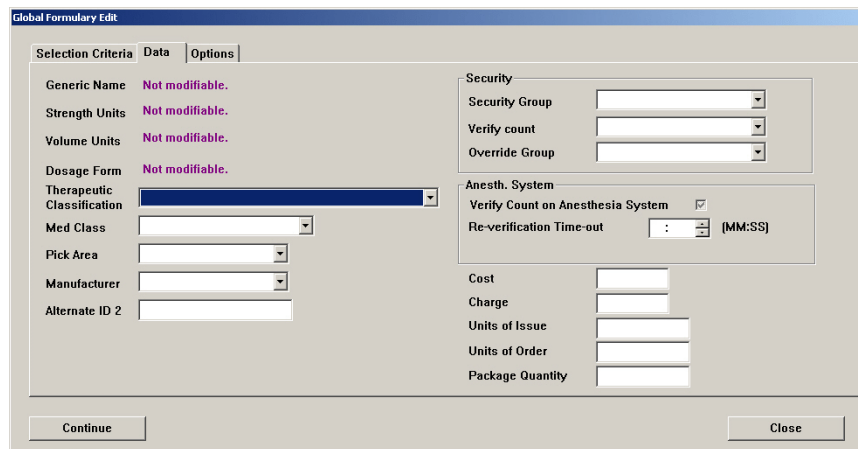
The values you enter in the Selection Criteria tab determine which medications are updated.

- To see a list of the medications that will be updated based on your selection criteria, click **Review Selections**.

The Items to be Edited dialog box appears.



- When you have finished reviewing the selections, click **Done**.
- If the list of medications to be updated is not what you expected, modify the selections you made in step 2; otherwise, proceed to the next step.
- Click the **Data** tab.

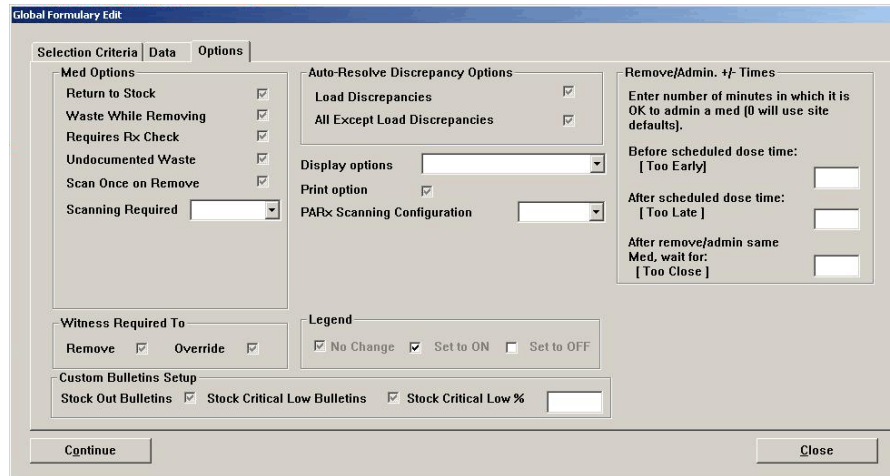


- Enter the new values for the fields on this tab.

NOTE

The values you enter become the new values for all medications selected based on the Selection Criteria tab.

- Click the **Options** tab.



- Enter the new values for the fields on this tab.

NOTE

Note the legend at the bottom of the dialog box—each check box can have three values (instead of the usual two values): On, Off, or No Change. No Change means that the field retains its current value and is not affected by the edit.

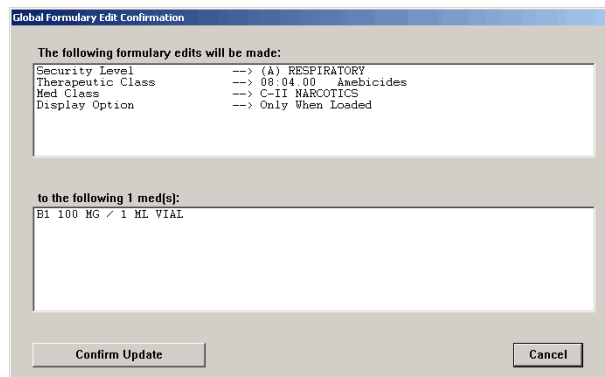
The values that you enter become the new values for all medications that you selected based on the Selection Criteria tab.

NOTE

Stock Out Bulletins and **Stock Critical Low Bulletins** options are editable by Global Edit only when they are enabled by site option.

- Click **Continue**.

The Global Formulary Edit Confirmation dialog box appears, indicating the changes to apply and the list of medications to which to apply the change.

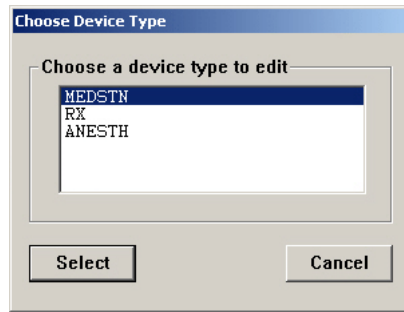


- To apply the changes, click **Confirm Update**.
- In the confirmation message that appears, click **OK**.
- In the next confirmation message that appears, click **OK**.

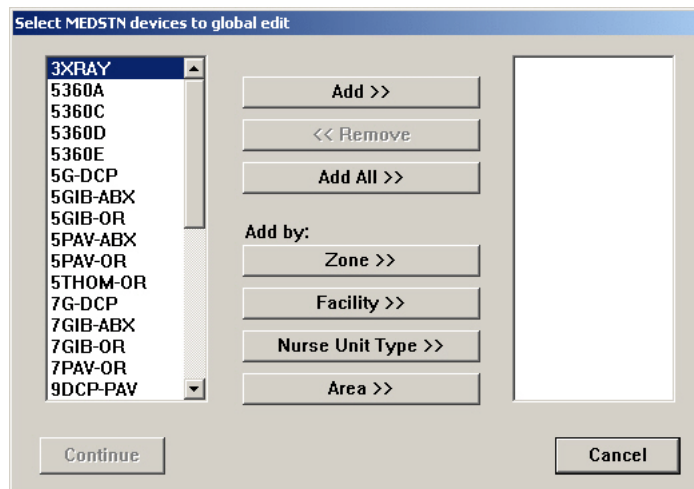
Updating device information globally

Global editing of devices provides a way of updating selected devices. The system generates the normal configuration message to each device that is involved. For more information about these settings, see the applicable section under *Adding a station or other device* on page 19.

1. In the menu bar, click **Utilities > Global Edits > Devices**.
2. In the Choose Device Type dialog box, select the type of device to update.



3. In the Select <Type> devices to global edit dialog box, do one of the following:
 - Select the device names in the list on the left and click **Add** to move the selected items to the column on the right.
 - Use the **Zone**, **Facility**, **Nurse Unit Type**, or **Area** buttons to access a list of devices sorted based on the button, select the applicable zone, facility, nursing unit, or area and click **Select**. The corresponding devices are added to the column on the right.



4. When you have finished selecting devices, click **Continue**.

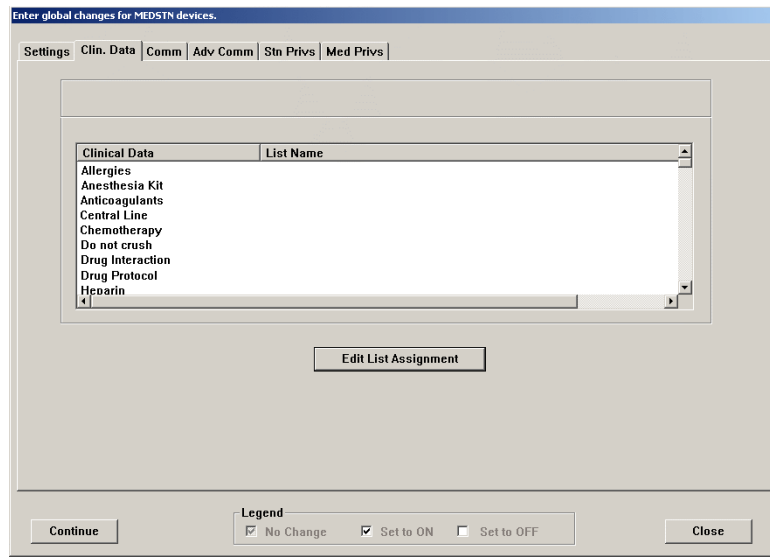
- In the Enter global changes for <Type> devices dialog box, make the applicable changes on the **Settings** tab.

NOTE

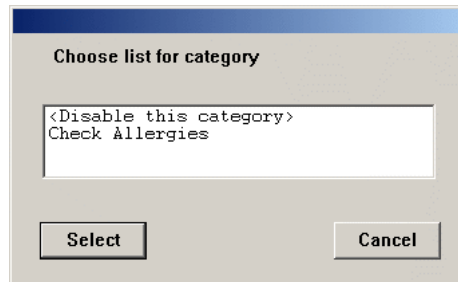
Stock Out Bulletins and **Stock Critical Low Bulletins** options are editable by Global Edit only when they are enabled by site option.

- If you are updating stations that use profile mode, click the **Rx** tab and make the applicable changes.

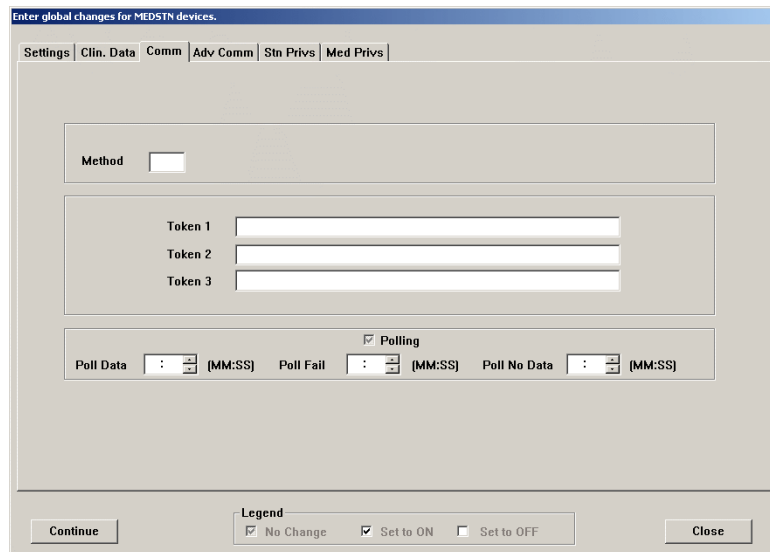
- Click the **Clin. Data** tab and make the applicable changes.



- To activate (or deactivate) a clinical data category, select the category name and click **Edit List Assignment**.
- Select the applicable information and click **Select** to add the definition to the List Name column.



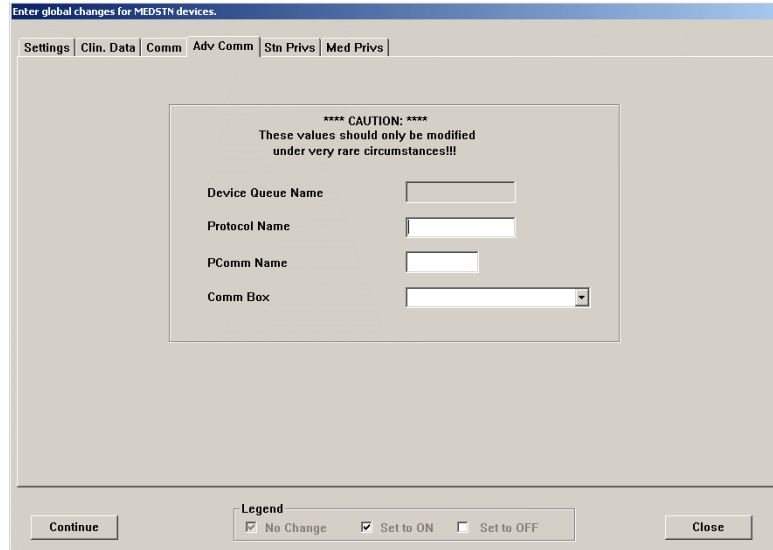
- Click the **Comm** tab and make the applicable changes.



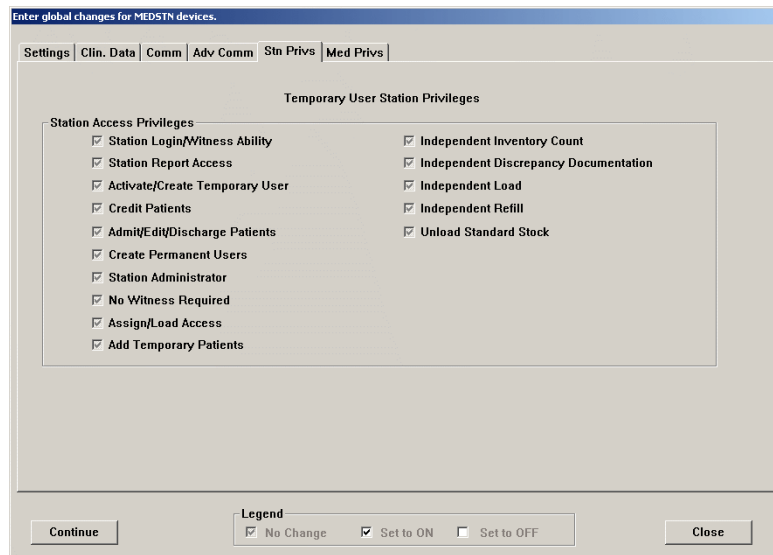
- If a CareFusion employee has instructed you to do so, click the **Adv Comm** tab and make the applicable changes.

CAUTION

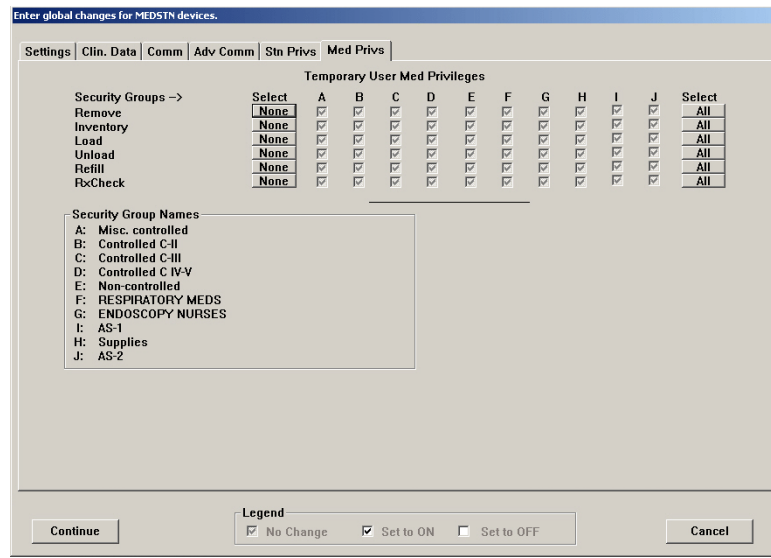
Do not change the information in this dialog box unless directed to do so by a CareFusion representative. This dialog box affects station communication and message processing.



- Click the **Stn Privs** tab and make the applicable changes.

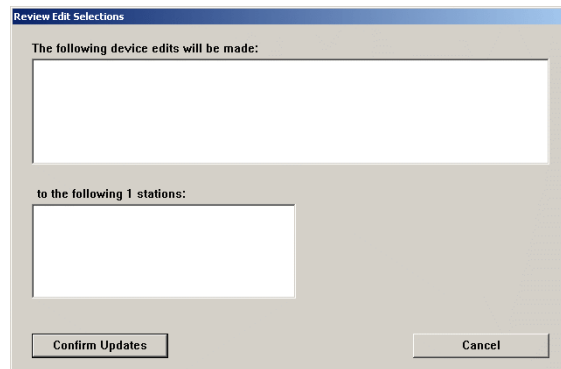


13. Click the **Med Privs** tab and make the applicable changes.



14. When you are finished, click **Continue**.

15. In the Review Edit Selections dialog box, verify that the changes are correct and then click **Confirm Updates**.



16. In the confirmation message that appears, click **OK** to return to the standby dialog box.

Updating user information globally

The following procedure explains how to update selection criteria for multiple users. For more information about these settings, see the applicable section under *Adding a user* on page 68.

CAUTION

When performing a global edit on users that are assigned to a specific user template, those users will no longer be assigned to that user template after the global edit.

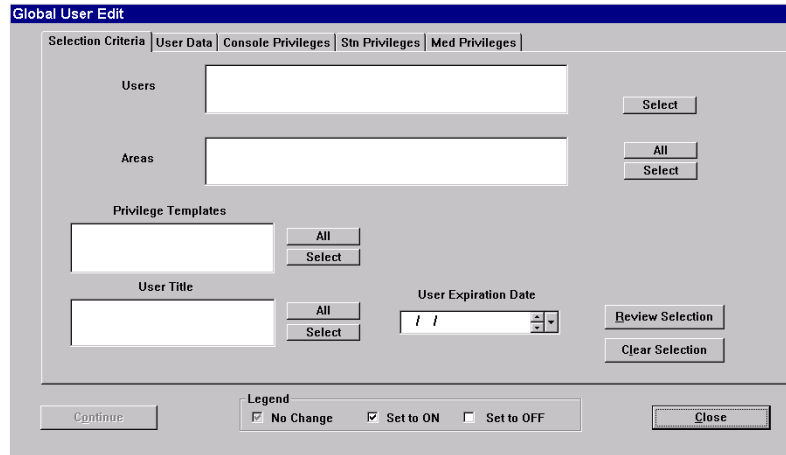
1. In the menu bar, click **Utilities > Global Edits > Users**.

The Global User Edit dialog box appears with the Selection Criteria tab selected.

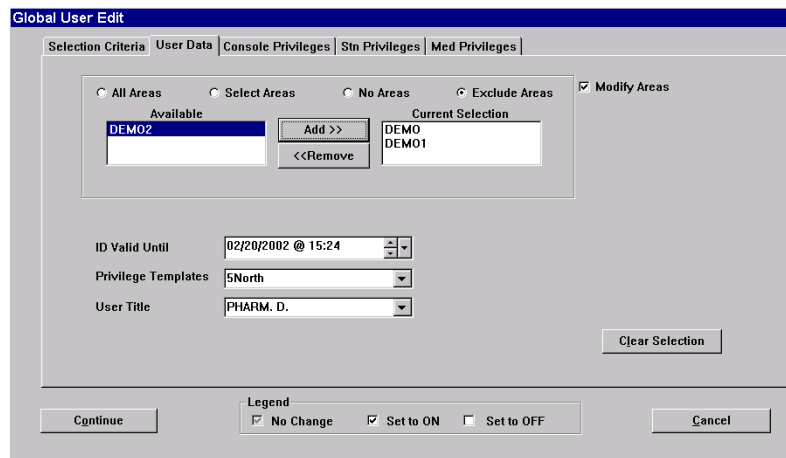
NOTE

Note the legend at the bottom of the dialog box. Each check box can have three values (instead of the usual two values): On, Off, or No Change. No Change means that the field retains its current value and is not affected by the edit.

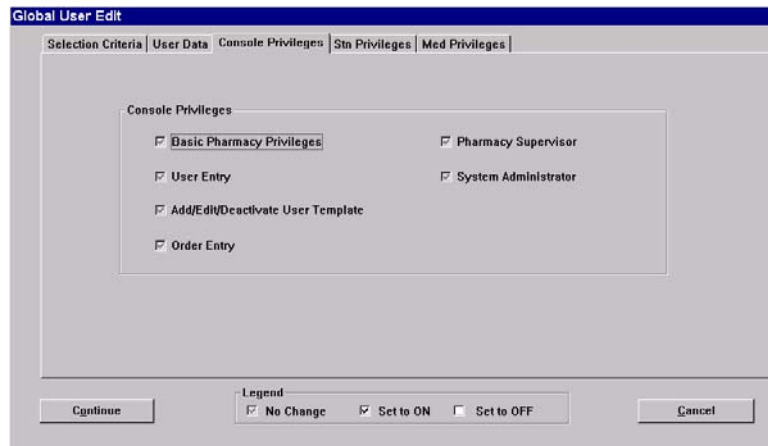
The Clear Selection button clears the dialog box.



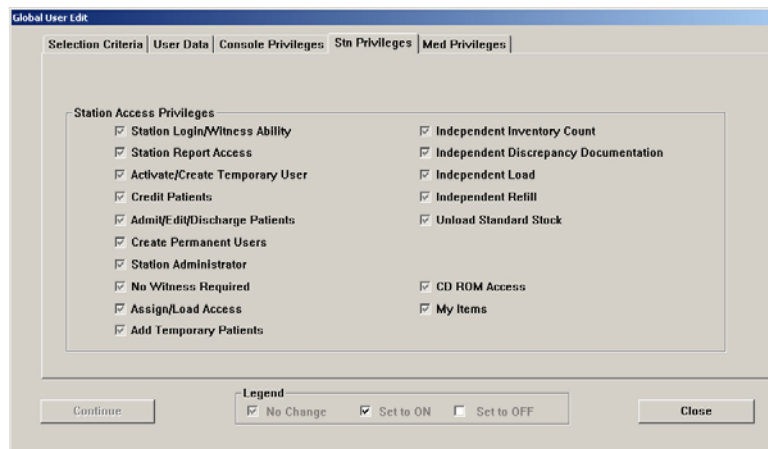
2. In the Users section, click **Select** to choose users.
3. In the Areas section, click **Select** or **All** to edit areas.
4. In the Privilege Templates section, click **Select** or **All** to edit templates.
5. In the User Title section, click **Select** or **All** to edit the user title.
6. In the User Expiration Date section, enter the date on which the logins expire.
7. To review the list of users who match the selected criteria, click **Review Selection**, review the list of users, and click **Done**.
8. Click the **User Data** tab and make the applicable changes.



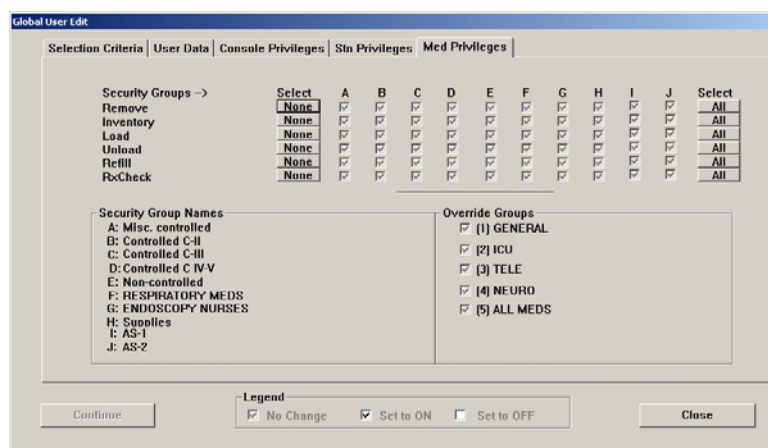
- Click the **Console Privileges** tab and make the applicable changes.



- Click the **Stn Privileges** tab and make the applicable changes.



- Click the **Med Privileges** tab and make the applicable changes.



- When you are finished, click **Continue**.
- In the Global User Edit Confirmation dialog box, verify that the changes are correct and then click **Confirm Updates**.
- In the confirmation message that appears, click **OK**.

Archiving transactions

The Pyxis MedStation system allows you to archive up to 31 days of transaction activity data in 24-hour increments. The data is stored in comma-delimited format, with character fields enclosed in quotes. You can specify both the types of archive files to create and the transaction fields to archive.

You can configure the console's archive maintenance to store up to 31 days of transaction data from which it generates console reports. You can also import archived data into a spreadsheet, relational database, or other form of third party software. This allows you to report more than 31 days of data.

The Archive function can create six types of files for each day that is archived:

- A header file (suffix.HDR)
- Pocket access transactions (suffix.PYX)
- User modification transactions (suffix.UTX)
- Resolved discrepancies file (suffix.DTX)
- Clinical data responses file (suffix.CDC)
- Legend of codes file (suffix.KEY)

Viewing or deleting the list of archive files

After you have activated archive maintenance, 31 days of archive files are automatically created and saved on the hard drive when the next maintenance cycle completes. You can view which archive files currently exist and delete archive files that you would like to have recreated in the next maintenance cycle. You cannot see the actual archive files, just the dates that correspond with those archives.

Field	Information
Date	The date that the transactions in the archive file occurred.
Active	The number of records in the activity transaction file (.PYX).
Users	The number of records in your transaction file (.UTX).
Resolved	The number of records in the discrepancy transaction file (.DTX).
Archived Date	The date that the archive file was written.
Archived By	Specifies who copied the particular archive file.

To view an archive file

- In the menu bar, click **Utilities > Archiving**.

The Archiving dialog box appears. The dates of the archived files are shown, not the specific files.

Date	Active	Users	Resolved	Archived Date	Archived By
01/04/2000	0	0	0		
01/03/2000	0	0	0		
01/02/2000	0	0	0		
01/01/2000	0	0	0		
12/31/1999	0	0	0		
12/30/1999	0	0	0		
12/29/1999	0	0	0		
12/28/1999	0	0	0		
12/27/1999	0	0	0		
12/26/1999	0	0	0		
12/25/1999	0	0	0		
12/24/1999	0	0	0		
12/23/1999	0	0	0		
12/22/1999	0	0	0		
12/21/1999	0	0	0		

To delete a specific archive file

1. In the menu bar, click **Utilities > Archiving**.
2. In the Archiving dialog box, select the archive file to delete by clicking on the date.
3. Click **Delete Archive**.
4. In the confirmation message that appears, click **YES**.
5. To return to the standby dialog box, click **Close**.

Selecting archive data

This section includes the following topics:

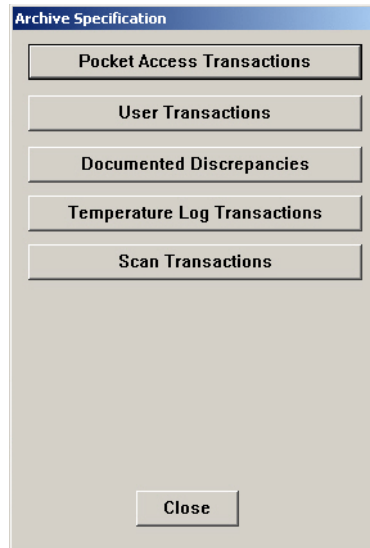
- *Creating or editing archival data for pocket-access transactions on page 150*
- *Creating or editing archival data for user transactions on page 152*
- *In the confirmation message, click **Close**. on page 152*
- *Creating or editing archival data for temperature-log transactions on page 153*

Creating or editing archival data for pocket-access transactions

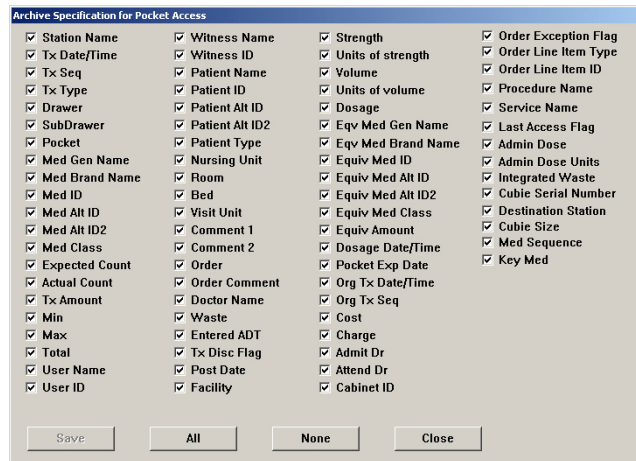
The following procedure explains how to archive pocket-access transactions.

1. In the menu bar, click **Utilities > Archiving**.
2. In the Archiving dialog box, click **Archive Specification**.

- In the Archive Specification dialog box, click **Pocket Access Transactions**.



- In the Archive Specification for Pocket Access dialog box, select each option or click **All** of the Pocket Access transactions to archive.



- Click **Save**.
- In the Archive Specification dialog box, click **Close**.
- In the Archiving* dialog box, select one or more files to archive.
The Archive button becomes active.
- Click **Archive**.
- In the confirmation message, click **Yes**.
The file is archived.
- In the confirmation message, click **Close**.

Creating or editing archival data for user transactions

The following procedure explains how to archive user transactions.

1. In the menu bar, click **Utilities > Archiving**.
2. In the Archiving dialog box, click **Archive Specification**.
3. In the Archive Specification dialog box, click **User Transactions**.
4. In the Archive Specification for User Transactions dialog box, select each User Transaction field to archive or click **All** and then click **Save**.



5. In the Archive Specification dialog box, click **Close**.
6. In the Archiving* dialog box, select one or more files to archive.
The Archive button becomes active.
7. Click **Archive**.
8. In the confirmation message, click **Yes**.
The file is archived.
9. In the confirmation message, click **Close**.

Creating or editing archival data for document-discrepancy transactions

The following procedure explains how to archive document-discrepancy transactions.

1. Select **Utilities > Archiving**.
2. In the Archiving dialog box, click **Archive Specification**.
3. In the Archive Specification dialog box, click **Documented Discrepancies**.

- In the Archive Specification for Document Discrepancies dialog box, select the Document Discrepancies to archive or click **All** and then click **Save**.

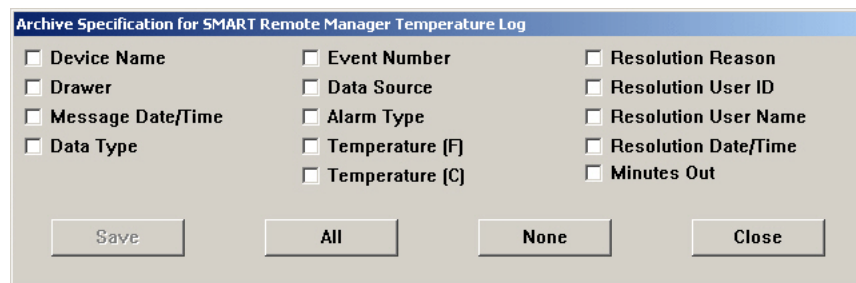


- In the Archive Specification dialog box, click **Close**.
- In the Archiving* dialog box, select one or more files to archive. The Archive button becomes active.
- Click **Archive**.
- In the confirmation message, click **Yes**. The file is archived.
- In the confirmation message, click **Close**.

Creating or editing archival data for temperature-log transactions

The following procedure explains how to archive temperature-log transactions.

- Select **Utilities > Archiving**.
- In the Archiving dialog box, click **Archive Specification**.
- In the Archive Specification dialog box, click **Temperature Log Transactions**.
- In the Archive Specification for Pyxis SMART Remote Manager Temperature Log dialog box, select each field of the log to archive.



5. Click **Save**.
6. In the Archive Specification dialog box, click **Close**.
7. In the Archiving* dialog box, 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**.

Copying archive files to media

To prevent the possible introduction of a computer virus into the Pyxis MedStation system, always use new disks. If you must recycle disks, reformat the disk, and run an antiviral program on it prior to use. CareFusion recommends that you use disks available from CareFusion because these disks are high-quality and have been rigorously tested to ensure their suitability and reliability.

1. In **Utilities > Archiving**, select one or more files to archive.
The Archive button becomes active.
2. Click **Archive**.
3. In the confirmation message, click **Yes**.
The file is archived.
4. In the confirmation message, click **OK**.

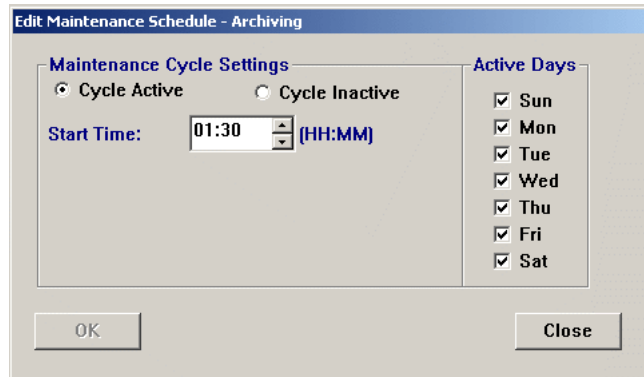
Scheduling archive maintenance

The Pyxis MedStation system allows you to specify the maintenance schedule for the archiving task. You can also begin running maintenance at any time, even if it is not scheduled.

1. Select **System Setup > Site Specific Options**.
2. In the Site Information dialog box, click the **Maintenance** tab.
3. In the Maintenance Schedule section, select **Archiving** and click **Edit Maintenance Schedule**.

- In the Edit Maintenance Schedule – Archiving dialog box, enter the time that the maintenance cycle should begin in the **Start Time** box.

Because archive files are generated for the previous day, the start time should provide time for all transactions to communicate down to the console so as to be included in the archive file.



- To indicate when the task should run, select the applicable **Active Days** check boxes.

NOTE

Archiving runs on the days that you specify, unless you indicate that the cycle is inactive. A maintenance cycle is inactive if you select Cycle Inactive. This means that the maintenance cycle does not run, but allows you to keep the settings for future use.

Select Cycle Active to run the cycle at the time and days specified.

- To save your changes, click **OK** and then click **Save**.
- In the confirmation message that appears, click **OK**.

Chapter 5

Inventory

Use the Inventory feature to manage your facility's inventory as it moves from the pharmacy out to each station. After you set up your inventory, you can use inventory reports to gain information about medication usage and make decisions before refilling, unloading, replacing, and editing station and pocket contents.

This section includes the following topics:

<i>Assigning a medication to a pocket</i>	158
<i>Replacing or editing a loaded medication</i>	165
<i>Clearing a pending medication</i>	166
<i>Making a pocket unavailable</i>	166

Assigning a medication to a pocket

You initially set up your inventory by assigning formulary items to specific pockets and stations. You also set up planned inventory counts and individual pocket options. After initial setup, you can assign formulary items to empty pockets.

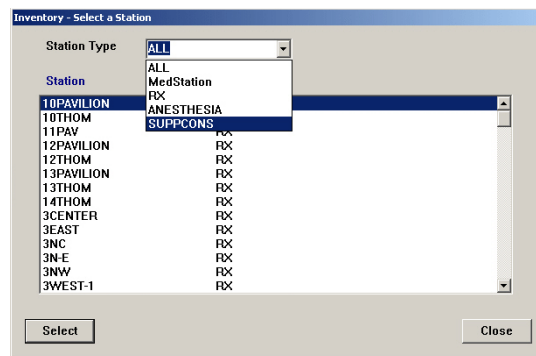
CAUTION

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.

To assign a medication to a pocket

1. In the menu bar, select **Inventory > Station Inventory**.
2. In the **Inventory – Select a Station** dialog box, select the station into which you want to load medications and click **Select**.

You can limit the number of stations displayed by selecting a Station Type first.

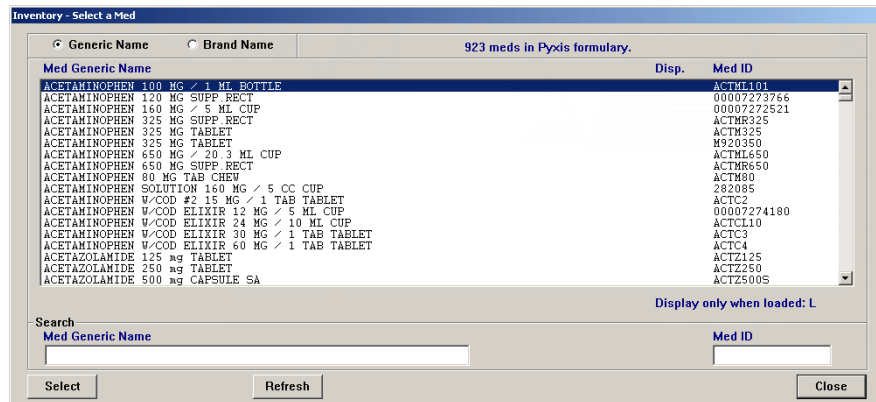


The **Inventory – Meds For [station]** dialog box appears showing the medications that are currently loaded or pending in the selected station.

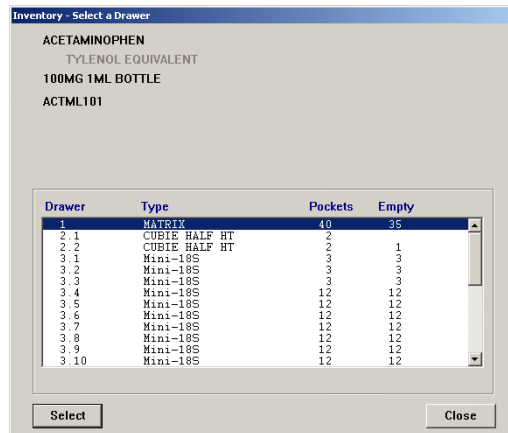
Med Name	Drw	[Type]	Pkt	Max	Min	Current
acetaminophen 325mg tablet	2.9	M18X4	3	20	15	20
albuterol 17GM INHALER	1	M18X13	4	2	1	2
atropine sulfate 10ml 0.1mg 1ml SYRINGE	1	M18X13	1	3	2	3
bupivacaine 0.5% 10ml VIAL	4	DC8	E	10	5	7
calcium gluconate/MSR RIDER 4.65meq 50ml IVPB	5	DC8	A	4	2	4
CEFAZOLIN 1GM VIAL	1	M18X13	2	12	8	12
DEXTRROSE 50% 50ml SYRINGE	1	M18X13	12	3	2	3
diphenhydramine 50mg capsule	2.8	M18X2	1	20	10	12
diphenhydramine 50mg 1ml VIAL	2.6	M18X2	1	25	15	20
epinephrine 1mg 1ml AMP(S)	2.7	M18X2	1	12	8	12

3. Click **Assign New Med**.

4. In the Inventory – Select a Med dialog box, select the medication and click **Select**.

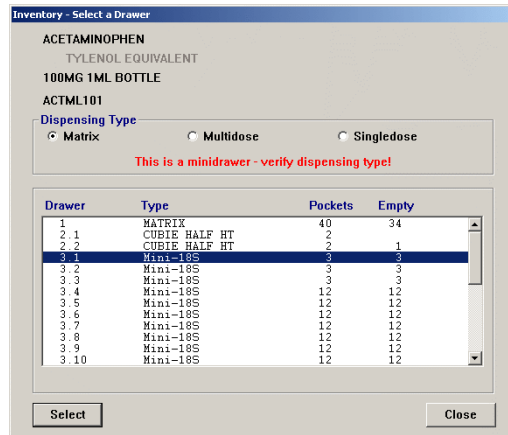


5. In the Inventory – Select a Drawer dialog box, select the drawer to assign the medication to and click **Select**.

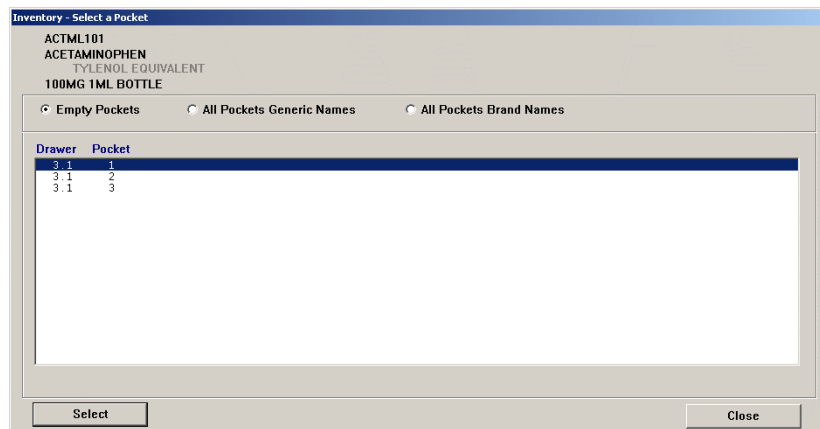


6. If you selected a MiniDrawer, do the following when the next Inventory – Select a Drawer dialog box appears:
 - a. If the MiniDrawer does not currently have pending or loaded medications, select one of the following types of dispensing drawers:
 - o **Matrix**—The drawer is treated as a regular matrix drawer—each pocket is assigned a different medication.
 - o **Multi-dose**—All pockets in the drawer are assigned the same medication and each pocket can contain a varied quantity of that medication.

- **Single-dose**—All pockets in the drawer are assigned the same medication, and each pocket can contain no more than one medication.



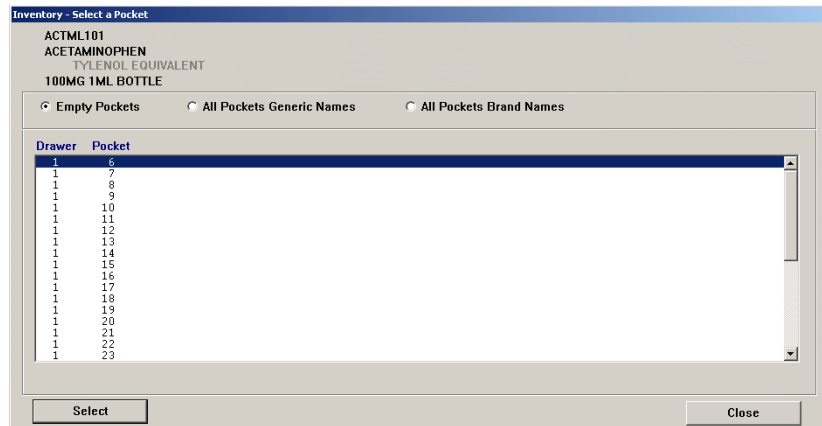
- If the MiniDrawer does have pending or loaded medications, it is preconfigured as a Matrix multi-drawer or single drawer.
- Click **Select** and then click **YES** when the confirmation message appears.
- If you selected Matrix for this MiniDrawer, select the applicable pockets when the Inventory – Select a Pocket dialog box appears and then click **Select**.



- 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 dialog box appears and click **Select**.

NOTE

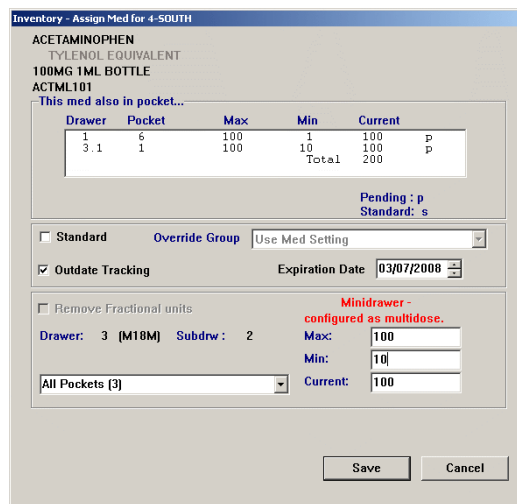
You can sort the pockets list by clicking the appropriate button—by Empty Pockets (in the selected drawer), by All Pockets Generic Names, or by All Pockets Brand Names. If you are using a matrix drawer, sort by All Pocket Generic Names allows you to view which medications are sharing the drawer.



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

NOTE

A standard medication is a medication that remains loaded in the station at all times. (You might determine this information based on past usage.) If you attempt to unload it at the station, the station displays a warning.



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

NOTE

Users with the same override group selected here have access to the medication in this pocket. This field defaults to Use Med Setting, which means you can cause the pocket's override group to automatically match that of the formulary item. (This does not display for medications loaded in another station.)

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.

You might want to use Outdate Tracking for:

- Medications that are used infrequently, to ensure that expired medications do not remain available for administration.
- Expensive medications, to ensure that they are not wasted.

The system sets up a default date (the current month) indicating when the medication is considered expired. You can change this date, if desired.

NOTE

The station subsequently uses this expiration date to determine whether the outdate (expiration date) for this pocket is within the current month. If it is, a message displays at the station to warn you that the pocket being accessed might contain outdated medications and that the expiration date on the medication they administer should be verified.

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

NOTE

Most medications do not need the Remove Fractional Units feature. Enable the feature for multi-dose elixirs where nurses might remove 7.5 CCs, for example, of a 15 mg dose. This feature is also necessary in pediatric units.

12. Assign the **Max**, **Min**, and **Current** values:

- **Max**—The maximum number of this medication loaded in the pocket. Be careful not to load the pocket so full that medication packages protrude above the rim of the pocket. This might prevent the drawer from opening.
- **Min**—The count or level at which the medication should be refilled. This level is an important threshold in Inventory reports and messages.
- **Current**—The actual number of this medication that you intend to load in this pocket.

NOTE

A rule of thumb is to initially set the Min level at 40% of the Max and then adjust it accordingly as you see how fast a certain medication is being depleted.

Another method is to determine your average daily (or hourly) need for the medication for the period of time between normal station refills and set the Max count and Min to cover that need.

What you actually load in the pocket at the station, however, supersedes the number you enter here.

For a Single-dose drawer, the values are no greater than the number of pockets in the drawer.

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

Select block loading on individual stations

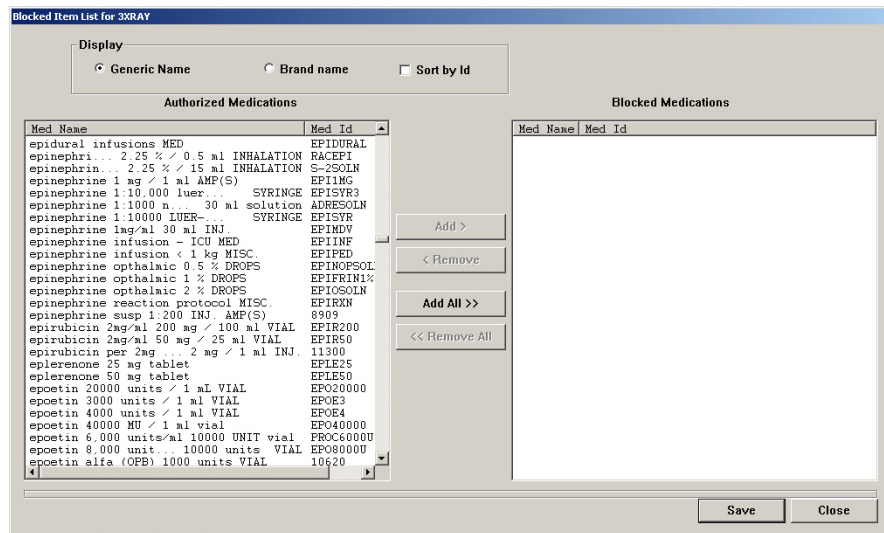
This feature allows your institution to select specific medications to block from loading at specific stations. The medications are selected from the full formulary list for each station. Once assigned, blocked medications will not be available for loading to that device via the console nor the station.

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

NOTE

Integrated mains are not supported on the Pyxis MedStation system.

4. In the Blocked Item List for [station] dialog box, highlight the medications in the Authorized Medications list on the left.



5. Click **Add** to move the medication name to the Blocked Medications list on the right.
6. Click **Save**.
Blocked items appear greyed out in the console lists.

NOTE

Blocked inventory all applies at the station. Assign and load will not allow you to load a blocked medication.

Replacing or editing a loaded medication

The replacing a loaded medication function allows you to replace a loaded medication during initial inventory setup (or later) because it is not often used at the particular station, there are currently no orders for it, or it was loaded in error. The editing a loaded medication function allows you to view or change the Max and Min level of the pocket, or view or change pocket options such as Standard Med or Outdate Tracking.

1. In the menu bar, select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station dialog box, select the station to load the medications and click **Select**.
3. In the Inventory – Meds For dialog box, select the name of the medication to replace or edit and click **Edit Pocket**.

The Inventory – Editing Med For dialog box appears.

4. If you want to replace the current medication with another, do the following:
 - a. Click **New Med**.
 - b. In the Inventory – Select a Med dialog box, select the new medication and click **Select**.
5. Update the applicable information in the Inventory – Edit Med For [station] dialog box, click **Save**.

The Inventory – Meds For dialog box appears.

Clearing a pending medication

Clearing a pending medication allows you to cancel the assignment of a medication to a station that has not yet been physically loaded.

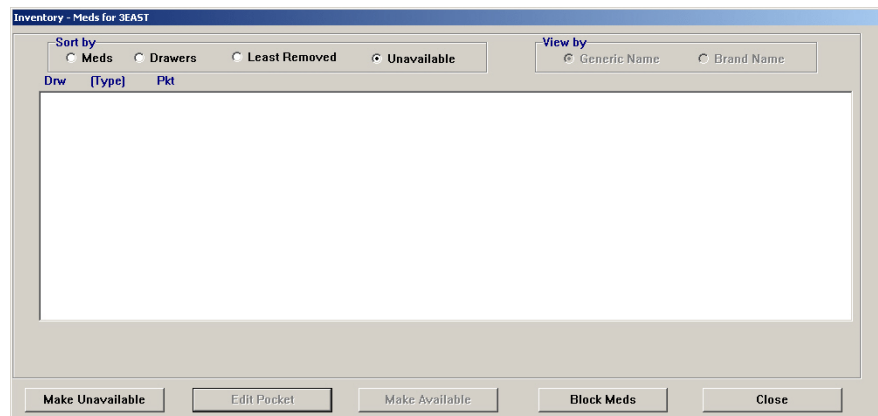
1. In the menu bar, select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station dialog box, select the station to load the medications and click **Select**.
3. In the Inventory – Meds For dialog box, select the name of the pending medication to clear and click **Clear Pend Med**.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

Making a pocket unavailable

Use this feature for pockets that no longer exist in modified matrix drawers, or for the Return Bin.

1. In the menu bar, select **Inventory > Station Inventory**.
2. In the Inventory – Select a Station dialog box, select the station for which you want to make the medications unavailable and click **Select**.
3. In the Inventory – Meds For dialog box, click **Unavailable** in the Sort by section of the dialog box.

If any pockets are already unavailable, they are shown in the list.



4. Click **Make Unavailable**.
5. In the Inventory – Select a Drawer dialog box, select the drawer that contains the pocket that you want to make unavailable and click **Select**.
6. In the Inventory – Select a Pocket dialog box, select the pocket that you want to make unavailable and click **Select**.
7. In the Inventory – Meds For dialog box, click **Close** to complete the process.

Chapter 6

Reports

The console provides reports to help you manage and monitor your system. This section includes the following topics:

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<i>Report descriptions</i>	169
<i>Generating a report</i>	173
<i>Batch reports</i>	175

Available reports

The Reports feature allows you to view or print system information. You can group, sort, and filter the information to meet your reporting needs. You can also print or view the reports on dialog box.

Report types are divided into four categories, based on the information they provide:

- **Inventory**—The Inventory reports provide a detailed account of the status of inventory throughout the system, allowing effective inventory management. You can generate these reports for specific stations or for all stations. Depending on the report selected, you can also generate them by zone, area, item name, item ID, and door and bin.
- **Activity**—Activity reports are a comprehensive group of records that detail all user interactions with the system (a transaction history) for specific stations. Activity reports include specific information on all accesses, charges and credits, loading and unloading, discrepancies in the system, and refill activities. Use these reports to get an overall view of how your particular station is functioning and how to improve its usage.
- **System Activity**—System Activity reports monitor and track system-wide activity of the Pyxis MedStation system. You can determine which users have been modified and by whom and track system access. These reports help you maintain both the security and consistency of the Pyxis MedStation system in your facility.
- **System**—System reports provide you with a snapshot of what your system contains at the time you run the report. For example, you can run a Formulary report, which lists all formulary items in the system and their options, or you can run a Clinical Data Categories report, which lists all clinical data categories currently defined and any associated lists.

Report descriptions

The following table, which is listed in alphabetical order, describes the reports available in each category:

Category	Name	Description
Inventory	All Orders By Med	Identifies all patients who have ordered a medication.
	Empty Pockets	Locates all (or selected) drawers that contain empty pockets or that do not have medications assigned to them.
	Hospital Wide Med Summary	Identifies pockets containing specific medications.
	Inventory By Station	Produces a complete inventory by station, by drawer, including those items that are below minimum or in excess of maximum counts.
	Loaded Med W/O Orders	(Also known as Loaded Meds Without Orders) Provides a summary of loaded medications that do not have orders associated with them and those that would be good candidates for unloading if more space is needed.
	Meds Ordered & Below Min	Provides a summary of medications ordered with inventory at or below the minimum set for the medication, which helps you identify ordered medications that are due for a refill.
	Meds Without Removals	Identifies all (or specific) stations that contain medications that are seldom or never used.
	My Items Aging	Lists the inventory of My Items for selected users or all users (only available for Pyxis Anesthesia System).
	Pended Not Loaded	This report shows items that are pended for a pocket, but that have not been placed in the station (loaded).
	Ordered Meds Not Loaded	Consists of two reports: one that includes equivalencies and one that does not. Provides a summary of ordered medications (sorted by area) that are not loaded and might need to be loaded immediately.
	Outdated Inventory	Shows any pockets that might contain expired medications based on the expiration dates entered for the medications when the pockets were loaded or refilled.
	Refill Pick & Delivery	(Also known as Refill - Pick and Refill - Delivery.) Consists of two reports: one for picking medications to refill and one for delivery of the medications. The pick report lists the total quantity of each medication that needs to be pulled for the entire facility, while the delivery report identifies how much needs to be delivered and where.
	Stock Management Worksheet	Provides a worksheet by area, listing empty pockets, ordered medications not loaded, and pockets that have not been accessed since the date you specified.
	Stock Out Summary	Identifies medications whose quantities have reached zero.

Category	Name	Description
Activity	All Discrepancies	Lists all unresolved (open) and all resolved (closed) discrepancies.
	All Station Events	There are many reasons why you might run this report. The following lists several examples: <ul style="list-style-type: none"> To comply with federal and state regulations, run this report for all narcotic transactions and retain the reports for your records. To support investigation of unresolved discrepancies. To view CDC responses for versions of the Pyxis MedStation system prior to 4.1. To complete an audit.
	Billing Summary	Summarizes billing by patient (or other sort order) rather than by individual transaction.
	Charges & Credits	Provides a comprehensive list of all charges and credits for one or more patients or stations.
	Clinical Data Categories	Lists all CDC responses.
	Inventory Verification	Provides a list of all inventory at one or more stations.
	Loading & Unloading	Indicates how much pharmacy activity is spent loading and unloading a medication.
	Med Refill Activities	Tracks frequency of medication refills to help you determine if minimum and maximum levels are set appropriately.
	Outdated Med Removal	Lists the types and numbers of medications being outdated at the stations.
	Profile Override	Lists all Profile Override transactions that occurred during the specified time frame.
	Reconciled Patients Charges and Credits	Produces a report that contains records of the financial transactions associated with patients whose records were merged.
	Remove Warnings	Lists all remove warnings (Too Early, Too Late, and Too Close) that were overridden and the response that was entered to support the override.
	Return Bin Activity	Lists transactions for the return bin.
	Returns And Wastes	Lists Return and Waste transactions. It also links a transaction with its previous Remove transaction, if Remove was used.
	Rx Refill & Load Verification	Tracks the quality of your refill activities for medications selected for Rx Check. Run this report on a regular basis, if your facility uses the Rx Check feature in the Pyxis MedStation system.
	Smart Scan Activity	Provides a report detailing scan on remove activity.
	Transfer From/To User	Lists medications removed from one user's My Items list and transferred (added) to another user's My Items list (available only for Pyxis Anesthesia System).
Undocumented Waste	Details all open Undocumented Wastes.	

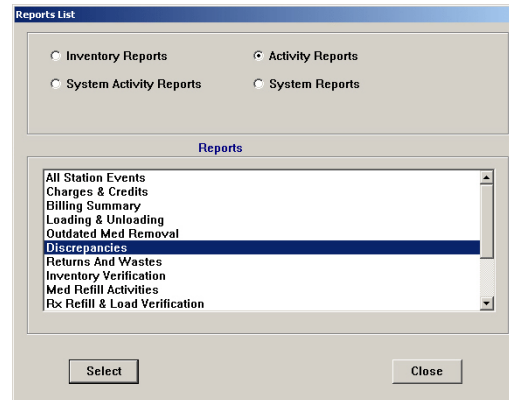
Category	Name	Description
System Activity	BioID Global	(Also known as BioID Global Info) Tracks BioID logon activity and statistics by station.
	BioID User Activity	Tracks BioID logon activity and statistics by user.
	BioID - Users Not Registered	Lists users who have not registered their BioID.
	Console & Station Activity Log	Lists all access activity, in chronological order, at one or more stations.
	Entered ADT Information	Tracks admission, discharge, and transfer (ADT) information entered through any station. This includes all patients whose information was entered manually.
	Login Activities	Tracks all successful logon attempts by users. Also includes users who log on as witnesses.
	Service Messages	Lists all service messages that occurred during the previous day.
	SMART Remote Mgr Temperature Log	Lists temperature ranges and documents out-of-range and resolution reasons.
	User Modification Information	Lists all changes in user security during a specific date range. This includes the addition of temporary users and standard users, as well as the modification of information for existing users.
System	Archive Specifications	Lists the fields selected for archiving within the three file types: Pocket Access, User Transactions, and Documented Discrepancies.
	Areas	Lists all areas, the nursing units assigned to those areas, and the automatic discharge time of each nursing unit.
	Attention Notices	Prints a copy of all current attention notices in addition to displaying them on the console.
	Batch List	(Also known as Batch Report List) Lists all currently defined batch reports.
	Clinical Data	Provides all clinical data categories, category lists, and category options.
	Combination Dose Groups	Lists all Combination Dose Groups defined in your formulary.
	Devices	Lists all devices in the system and configuration options.
	Equivalencies	Lists all equivalencies defined in your formulary.
	Formulary	Lists all formulary items in the system and their configuration options at the time the report is run.
	Formulary Links	Lists each formulary item and its association with kits. If Profile options are activated, the report also includes associations with equivalencies, variable doses, and combination doses.
	Kits	Lists all kits defined at the console.
	Override Groups	Lists the override group for each medication at a station. Also lists users and their override groups.
	Patient Profiles	Provides summary or detail of orders.

Category	Name	Description
System (cont'd)	Patients	Lists and describes all patients in the system.
	Pharmacy Configuration	Lists security levels, medication classes, discrepancy resolution reasons, and station and formulary lists.
	Profile History	Shows each order for the patient as originally entered, including a history of any modifications made to each order during a specified time interval. The report shows what was changed (by whom and when) and if the change was via the host or from the console. The report also lists expired orders.
	Reconciled Patients	Reconciles permanent patients to temporary patients. This includes: <ul style="list-style-type: none"> • The name and ID of the user who created the association. • The time that the patient records were reconciled.
	Site Specific Options	Provides information such as hospital demographics, system options, and report and maintenance options. The information presented represents what was defined using the Site Specific Options in the System Setup menu.
	SMART Remote Mgr Configuration	(Also known as Device Temperature Configuration.) Displays temperature extremes, polling interval, and last calibration date for each Pyxis SMART Remote Manager Device and Drawer.
	Statistics	(Also known as System Statistics) Provides system statistics such as the number of medications in the formulary, the number of users, the number of patients, and the number and types of devices.
	Users	Lists all users, their configuration options, and the last date of access. Review this report to ensure that all required users are currently in the system and to ensure that all terminated employees are removed from the system.
	Variable Dose Groups	Lists all Variable Dose Groups defined in your formulary.
	XQ Messages	Lists all transaction messages currently in the XQ message queue.

Generating a report

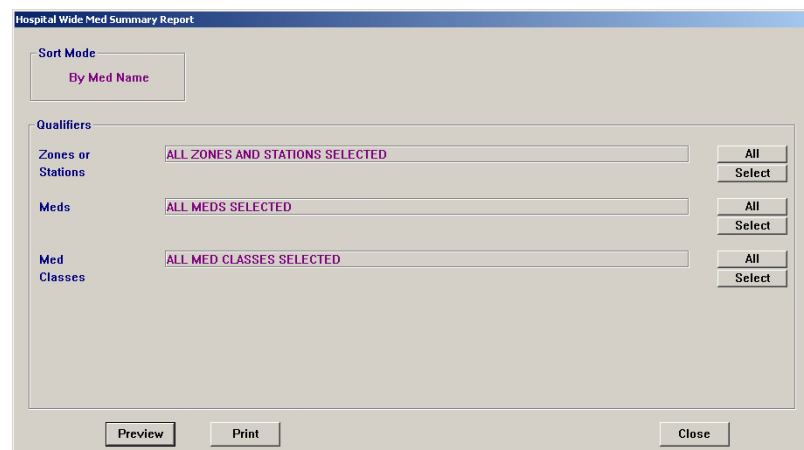
The dialog boxes represented here are a sample of one report selection. Your dialog boxes may look different depending on the report that you select, however the workflow is similar.

1. In the menu bar, select **Reports > Run Reports**.
2. In the upper section of the Reports List dialog box, select a category.



3. In the corresponding list of reports, select the applicable report and click **Select**.

The dialog box for the selected report appears; the dialog box that you see varies depending on the report that you selected. Note that the system defaults each qualifier to All.



4. Select the applicable options.
5. If applicable, click **Select** for each qualifier and select the applicable information in the dialog box that appears. Click **Add > OK** to return to the main dialog box.
6. To view the report information on the dialog box, click **Preview**.

The report appears on the dialog box.

- To move forward and backwards through a multi-page report, click the scroll bar.

7. To print the report, click **Print** and then click **OK** when the confirmation message appears that indicates that the report has been added to the queue.
8. Click **Exit** to return to the previous dialog box.

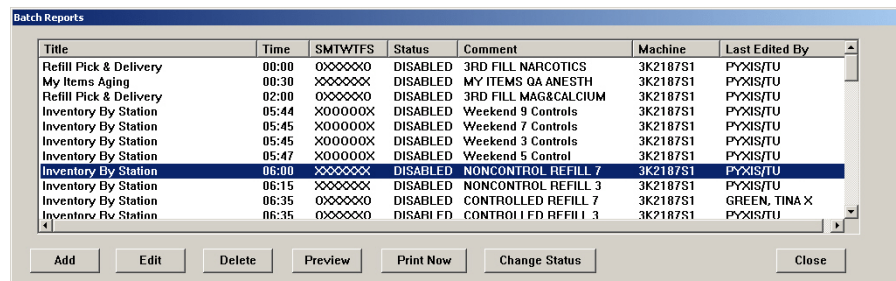
Batch reports

The Batch Reports option is issued to generate routine reports automatically in accordance with a selected schedule.

Adding a batch report

The following procedure explains how to create batch reports.

1. In the menu bar, select **Reports > Batch Reports**.
2. In the Batch Reports dialog box, click **Add**.



3. In the upper section of the Reports List dialog box, select the applicable category.
4. In the corresponding list of reports, select the applicable report and click **Select**.

The dialog box for the selected report appears; the dialog box that you see varies depending on the report that you selected. Note that the system defaults each qualifier to All.



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**.

- In the Batch Time Setup dialog box, specify the time and days on which the report should run.

- Select the machine—console or printer—where the report is to print.
- 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**.
- In the report dialog box, click **Save**.

The Batch Reports dialog box lists the report that you have set up.

Title	Time	SMTWTFSS	Status	Comment	Machine	Last Edited By
Refill Pick & Delivery	01:00	XXXXXXXX	ENABLED	BatchDemo	2KZZZSRV	PYXIS/TU

The report automatically queues up for printing at the specified day and time. It does not interrupt the printing of a report in progress, nor does it interrupt a user who is logged on to the system at the same time.

- To return to the standby dialog box, click **Close**.

Viewing the list of batch reports

The following procedure explains how to view a list of existing batch reports.

- In the menu bar, select **Reports > Batch Reports**.
The Batch Reports dialog box lists the jobs that have been set up.
- To return to the standby dialog box, click **Close**.

Editing a batch report

The following procedure explains how to update existing batch reports.

- In the menu bar, select **Reports > Batch Reports**.
- In the Batch Reports dialog box, select the job that you want to update and click **Edit**.

The dialog box for the applicable report appears.

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 dialog box, 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 dialog box, click **Save**.

The Batch Reports dialog box lists the report that you have set up.

9. To return to the standby dialog box, click **Close**.

Deleting a batch report

The following procedure explains how to delete batch reports.

1. In the menu bar, select **Reports > Batch Reports**.
2. In the Batch Reports dialog box, select the applicable report and click **Delete**.
3. In the confirmation message, click **YES**.
4. To return to the standby dialog box, click **Close**.

Enabling or disabling a batch report

You can temporarily disable a batch report if you do not use it often. Disabling a batch report rather than deleting it is sometimes preferred if the qualifiers it contains are very specific or complex and would take a substantial time to redefine.

1. In the menu bar, select **Reports > Batch Reports**.
2. In the Batch Reports dialog box, 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 dialog box, click **Close**.

Printing a batch report

The following procedure explains how to print a batch report.

1. In the menu bar, select **Reports > Batch Reports**.
2. In the Batch Reports dialog box, select the applicable report and click **Print Now**.
3. In the confirmation message, click **OK**.
4. To return to the standby dialog box, click **Close**.

Appendix A

Troubleshooting

Problems occurring at the console can be the result of a variety of causes, including user input error, communications problems, power loss, and corrupt files or data. This section offers remedies to potential problems involving the console and its components. This section includes the following topics:

<i>Attention notice (bulletin)</i>	180
<i>Using brain transplant to restore a database</i>	183
<i>Communication problem with Pyxis Procar</i>	185
<i>ADT communication problems</i>	186
<i>Report does not include correct data</i>	188
<i>Facility power outage</i>	189
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<i>User cannot access a medication</i>	192

Attention notice (bulletin)

Attention notices are displayed at the console dialog box when the Pyxis MedStation system detects certain types of problems. Bulletins are the printed version of attention notices, if your system was configured to do so in the Site Specific Options feature. The most common examples of these notices including the following:

- **Interface Status**—Notifies when the console is not communicating with the facility host system or messages from the host system are delayed.
- **Stockouts**—Stockout notices list the medication, the station and the time that the stockout occurred. The notice disappears when the medication is refilled.
- **Stock Critical Low**—The system determines that the quantity of items in a pocket should be designated as “critically low” based on a percentage of the pocket’s “minimum stock” value.
- **Stations with Drawer Failures**—Indicates when a drawer fails to open properly.
- **Unresolved Discrepancies**—If a discrepancy occurs at the station during a remove or an inventory, that discrepancy is recorded at the console as an attention notice. It remains on the dialog box until either the discrepancy is resolved or after 31 days have passed.
- **Critical Override**—Allows a user to a remove formulary items without an order when the override group to which the item and user are assigned is not enabled on the station.
- **Special Attention Notices**—A report that contains attention notices in effect at the time the report is generated.

The following notices appear on the console when a system problem occurs:

- **Can’t Communicate Bulletin**—If a particular station has not successfully linked to the console for a period of 20 minutes and a minimum of three fail counts have been registered, the Can’t Communicate attention notice displays. This notice remains until the station successfully links to the console or until the station’s polling option is turned off.
- **Console Module Down**—If one of the console modules is not running, an attention notice displays describing which module is not running. Sometimes modules that stop running can restart themselves.
- **Drawer Failure**—If one or more drawers at any station has failed, an attention notice displays. Successfully recovering all failed drawers clears this notice.

Can’t communicate attention notice

If your dialog box is displaying attention notices stating that the console has failed to communicate with a station, try the solutions described in this topic.

NOTE

To ensure maximum system performance, always close the Communication Status dialog box after reviewing the information needed. The Communication Status dialog box should not be left open and active when not needed.

To determine your communication method

1. In the menu bar, select **CommStatus**.

Note whether XT follows the station name in the Device column. XT refers to a TCP/IP Token-Ring or Ethernet communication system.

2. Wait 30 minutes to see if the attention notice still appears.

If so, does it refer to the same station or a different station?

- If the notice remains for the same station, go to *Same station attention notice* on page 181.
- If an attention notice displays for a different station, see *Different station attention notice* on page 182.

Same station attention notice

If the communication problem is occurring at only one station, follow these steps:

1. Familiarize yourself with the communication device located next to the console.
 - Call the nursing unit where the station is located to find a user who is willing to spend five to ten minutes troubleshooting with you.
 - Have the other user look at the station and confirm that the clock in the upper-right corner is working. If it has stopped, the station must be unplugged and rebooted.
 - If you are unable to find someone, you might need to make several round trips between the station and console to localize the problem.
 - Have your information systems (IS) department check the network connection to the station.
2. Make sure that the communication device has power.

Check behind the station to see if red lights (at least one) are illuminated. If no lights are illuminated, the device's power cord has probably become unplugged. Reconnect the power cord.
3. Determine whether the communication link has been reestablished.

On the console, select CommStatus in the menu bar. Look for the station that caused the attention notice under Device. The next time the station is polled (under Last Polled), watch the failure count (FC) column for that station. If the FC is already zero or becomes zero after polling, communication has been reestablished. If the FC increments by one and does not return to zero, continue with the next step.
4. Check the CommStatus dialog box again.

If the FC continues to increment and does not return to zero, contact the TSC.

Different station attention notice

If communications problems are occurring at several stations, the problem might be console-related. A Recommended Standard (RS) communication problem at a station is also a possibility.

1. Verify that the communication device has power.

For information about checking all the connections, see *Same station attention notice* on page 181.

2. Verify whether the data cable is properly connected.

The data cable connects the communication device with the console. Gently wiggle each end of the line while carefully clicking them into their sockets.

3. Verify whether the communication link has been reestablished.

- a. On the console, select **CommStatus** in the menu bar.

- b. Look for the stations in the **Device** column. The next time the stations are polled (under Last Polled), watch the FC. If the FCs are already zero or become zero after each polling, communication is being reestablished. If the FCs continue to increment by one, contact the TSC.

4. If you are using the XT network mode of communications, you might want to get your information systems (IS) department involved as soon as possible to have them check the network connection to the station.

Using brain transplant to restore a database

A brain transplant restores a station's database from an error condition, such as a corrupted file, which prevents the station from operating correctly. A brain transplant is the process of copying and rebuilding the station's unique database from the console, where it has been continuously updated and saved with every poll of the station. A complete brain transplant involves taking the station out of service for a period of time. Depending on the station's database, this could take 15 minutes to two hours or longer.

Any number of error conditions at the station could signal the need for a brain transplant, but you should always consult with a CareFusion representative prior to initiating one, because some error conditions might be the result of something less dramatic and could be corrected with more conventional means.

Checking the communication status of a station

The following procedure explains how to check the station's communication status.

1. In the menu bar, select **CommStatus**.

The Communications Status dialog box appears. For more information, see *Communication status* on page 130.

A value other than 0 in the column labeled FC (fail count) indicates a potential communications problem between the console and the station.

If the FC is 0 and Last Poll and Last Link are each within a few seconds of the current time, you might need to transplant data back to the station.

2. Contact the TSC for assistance.

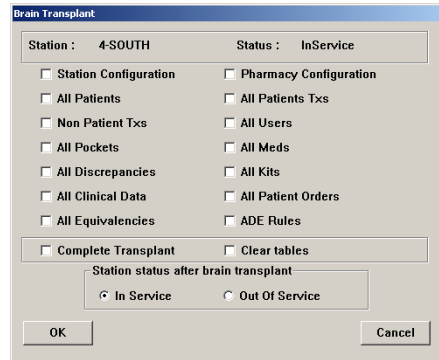
If the station has not experienced catastrophic data loss, there are brain transplant options which restores the data for a particular table that might have missing data. Depending on circumstances, you might be advised to use one of these other choices to update or correct a specific piece of the database, or if the data loss is more severe, you might be advised to do a complete brain transplant.

Running a brain transplant

Use the following procedure only under the direction of a CareFusion representative.

1. Select **System Setup > Devices**.
2. In the Devices dialog box, select the device that requires the transplant and click **Edit**.
3. In the Editing Device dialog box, click **Brain Transplant**.
4. In the Brain Transplant dialog box, select the applicable information, following the guidance of a CareFusion representative.

- If the station has not experienced catastrophic data loss, the representative might advise you to perform a partial brain transplant, selecting only some of the options to update or correct a specific piece of the database.
- If the data loss is more severe, the representative might advise you to do a complete transplant of the station.



5. In the **Station status after brain transplant** section, select the applicable option and click **OK**.
6. In the confirmation dialog box that appears, click **OK**.
The console restores the station tables with data from the console database. The Devices dialog box displays the status of the station as BrainTxPlant.
7. To close the dialog boxes, click **Close** and then click **Close** again.
8. When the station comes back into service, check the Communications Status dialog box (as described earlier in this process) to ensure that the FC is zero.
9. Check that the Last Poll and Last Link are each within a few seconds of the current time to make sure that the times are current.

Communication problem with Pyxis Procar

Some interface protocols can cause Pyxis Procar to stop communicating with the console for a specified period of time. If this is the case, communications are resumed after the protocol completes. If something seems uncharacteristically wrong at any time during the process, contact the TSC.

1. Determine whether the Pyxis Procar has power:
 - If the Pyxis Procar power light is on, go to step 2.
 - If the light is dimmed, check the following:
 - Press the power button. It might have been turned off accidentally.
 - Make sure that the power cord is plugged into a socket and into the back of the Pyxis Procar.

NOTE

Do not unplug or power off Pyxis Procar unless directed to do so by a CareFusion representative.

- If power resumes, go to step 2.
 - If power still does not resume, contact the TSC.
2. Check the communication status between the console and the Pyxis Procar:
 - a. In the menu bar of the console, click **CommStatus**.
 - b. In the Communication Status dialog box, check the Pyxis Procar device.
If the FC number continues to increment by one each time the device is polled, the communication problem still exists. In this instance, check the connection between the console and the Pyxis Procar.
 3. Check the Communication Status dialog box again.
 - If the FC number goes to zero, the device has successfully linked and should continue to run successfully.
 - If the FC number continues incrementing (does not go to zero), contact the TSC.

ADT communication problems

If you receive a call from a nursing unit stating that a patient's name is not showing up on the station:

1. Determine whether the patient was recently admitted or transferred to the unit.
If so, it is likely the patient's information will be sent to the station soon. Ask the nurse for the patient's identification number for reference. The nurse can enter the patient's information at the station using the Add Patient function (if the nurse has the privilege).
2. Determine whether the patient is listed at the console.
 - a. At the console, select **System Setup > Patients**.
 - b. In the Patients dialog box, enter the patient's name.
 - c. If the patient's data is at the console (with the correct nurse unit) but has not shown up yet at the station, troubleshoot for a communications problem.
 - d. If the patient is not found, select **List by** and then select **Discharged**. Type the patient name in the search box to locate the patient information.
 - e. If the patient is not listed on the console and you suspect the ADT interface, see *Patient or patient order not displayed at the console* on page 186.

Patient or patient order not displayed at the console

If a patient's data does not show up at the console, troubleshoot first for a communications problem with Pyxis Procar.

1. Determine whether the interface is behind.
Look at the attention notices at the console, or the Interface is Down message at the station. Try waiting a few minutes. If the interface is behind, not down, for example, because the host computer is doing a backup, the patients and orders might show up soon.
2. Check the status of the Pyxis Procar device.
 - a. In the menu bar of the console, click **CommStatus**.
 - b. In the Communication Status dialog box, check the Pyxis Procar device.
If the FC field is greater than zero, the communication link between Pyxis Procar and the console is suspect.
3. Call the IS department to find out whether the mainframe is or was shut down.
Explain that you believe that the ADT interface link between your Pyxis MedStation system and the mainframe might not have been initialized. Ask them to reset the port to the Pyxis MedStation system to restart the interface after normal operations resume.
4. If you have a special box that translates data from the mainframe, such as a Malibu or PQ-6 Black Box, check to see that the power cord is connected and that its power light is illuminated.

5. After securing the power cord and resetting the port, if the patient record still has not shown up on the console, contact the TSC.

NOTE

Do not unplug or power off Pyxis Procar unless directed to do so by the TSC.

Patient billing information problems

Go through the troubleshooting process, as explained in the *Patient or patient order not displayed at the console* on page 186.

Report does not include correct data

At the report's heading, check the parameters selected to create the report. Make sure that all the parameters cover the specific dataset that you intended.

If the report does not include data from the past few hours, change the To time parameter to NOW. This enters the current time into the time selection and causes the most current data to print.

If data for a particular station is missing, confirm that communication is current to that station by following the procedure for troubleshooting communications in *Can't communicate attention notice* on page 180. If everything appears current and the data is still incomplete, contact the TSC.

Facility power outage

In the unlikely event of a catastrophic power failure, including your facility's emergency power generator, the uninterruptible power supply (UPS) device included with the console provides enough power to complete currently processing tasks and effect an orderly shutdown of the console.

The console printer should never be plugged into the UPS. If it is, immediately turn the printer off and unplug it. When power is restored, plug the printer into a wall outlet.

Console printer not working

If you experience problems with the console printer, follow these steps:

1. Determine whether the printer has power.
Check that the power line to the printer is connected at both ends. If the printer is a laserjet, the LED panel on the top of the printer should display READY on the panel.
2. Determine whether the printer is out of paper.
Normally when a printer runs out of paper, it signals you with a beep. If using a laserjet printer, the LED panel on the top of the printer displays a message stating that the printer is out of paper.
3. Determine whether the printer is offline.
Press the **On-Line** or **Select** button (depending on the printer model) on the front panel.
4. Make sure that all covers are seated properly.
5. Turn off the printer's power and turn it on again.
6. If the paper is feeding, but nothing is printing, determine whether the ink ribbon or toner need to be replaced.
The ink might have been used up. Replace the ink ribbon and try running the report again. If using a Laserjet printer, the LED panel displays TONER LOW, indicating that the toner cartridge on the printer should be replaced.
7. Check the communication line between the printer and console.
Gently wiggle the communication line at the printer and console connections. Try running the report again.
8. If the preceding steps do not fix the printer, contact the TSC.

Remote diagnostics

On rare occasions, a problem occurs that defies explanation and troubleshooting procedures fail to pinpoint what is occurring or how it can be fixed. Sometimes the most direct fix is to use remote diagnostics, a process whereby a CareFusion representative dials in to the console computer. The representative:

- Has access to the computer's operating system level where testing can be accomplished using sophisticated software tools.
- Has sophisticated software diagnostic tools and repair options at hand, including, if necessary, the combined experience and skills of the entire Customer and Technical Support group.

If the TSC determines that remote diagnostics are necessary, you might be asked to help initiate the process. If so, you must be at the console and have a phone within reach. The TSC representative walks you through the steps required to prepare the console or Pyxis Procar computer for remote access.

User cannot access a medication

You might get a call from a nurse, pharmacy technician, or other station user who says he or she cannot access a medication that is loaded in the station. Verify that the desired medication does not appear shaded. If the medication is shaded, the medication is one of the following:

- Not loaded at the station.
- Out of stock.
- Not accessible to you due to lack of security privileges for the medication.
- In a failed drawer.
- A one-time order that has already been removed.
- On an order that is on hold.

Security groups also affect which medications your users can access. You assign security groups during formulary and user definition. For you to access a medication in a station, your security group assignment must match the medication's security group.

Appendix B

Pyxis® Advisor control panel

Pyxis® Advisor builds on the Patient Event Advisor (PEA) platform, alerting nurses at the station when patients are at risk for potential adverse drug events. This section explains Pyxis Advisor dashboard setup at the console.

This section includes the following topics:

Accessing Pyxis Advisor in the console 194

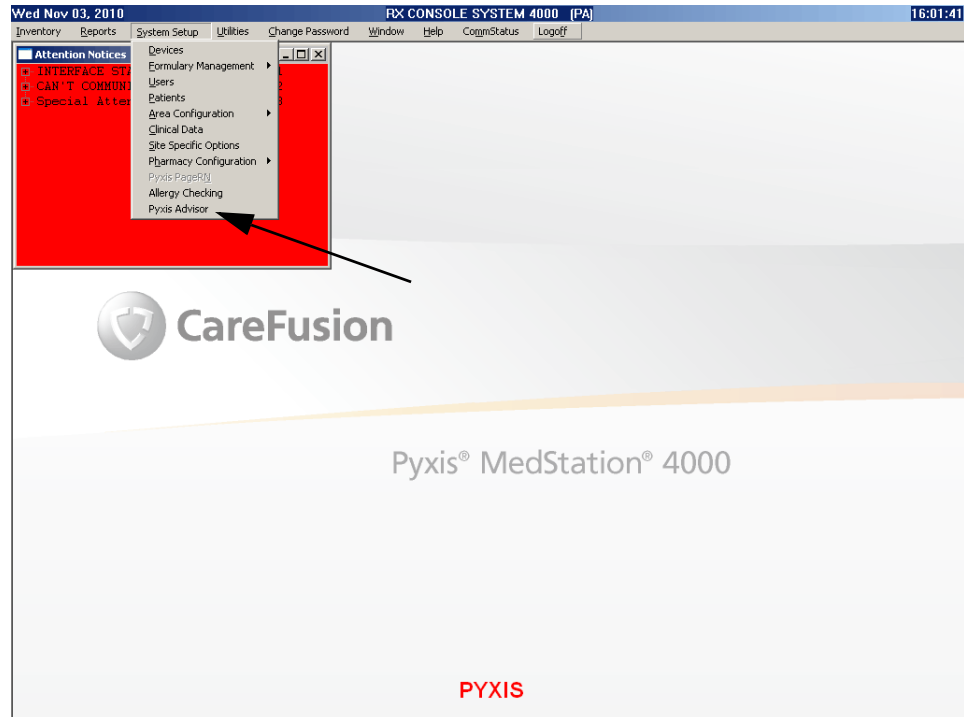
CAUTION

Alerts are supplemental information and are not intended to replace patient MAR (medication administration record) or existing hospital policies and procedures.

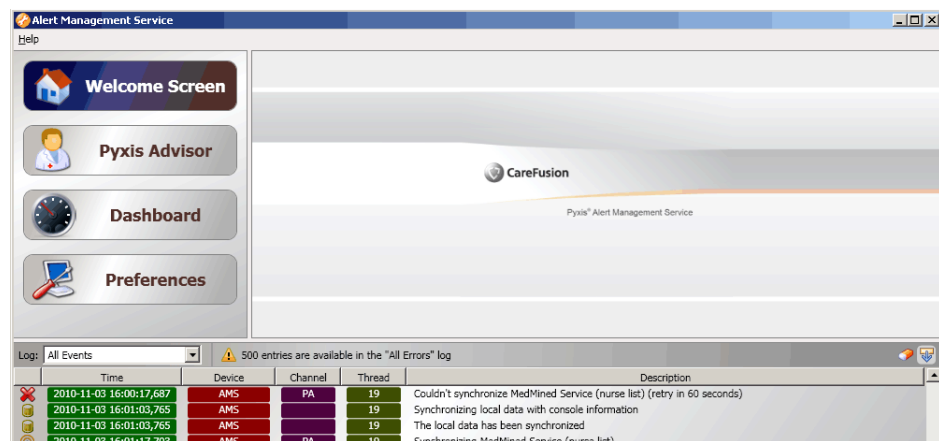
Accessing Pyxis Advisor in the console

To access Pyxis Advisor on the console, you must be first logged on as a system administrator.

1. After logging on, select **System Setup > Pyxis Advisor**.



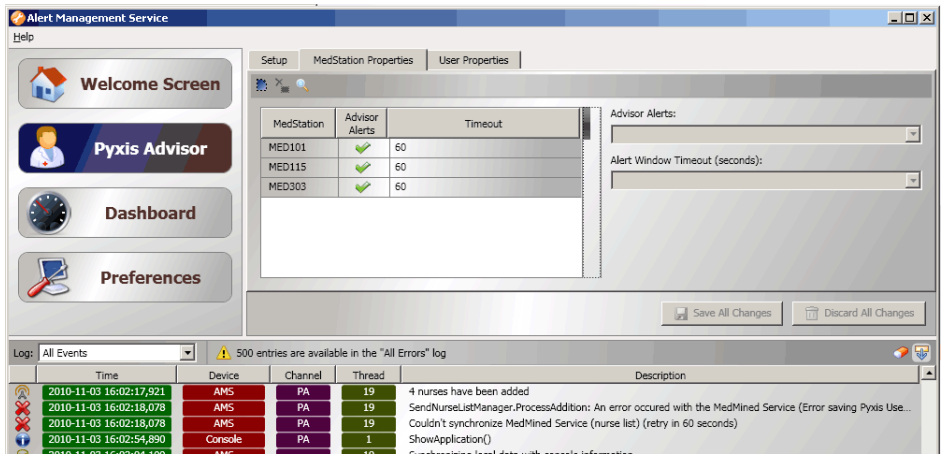
The Alert Management Service window appears.



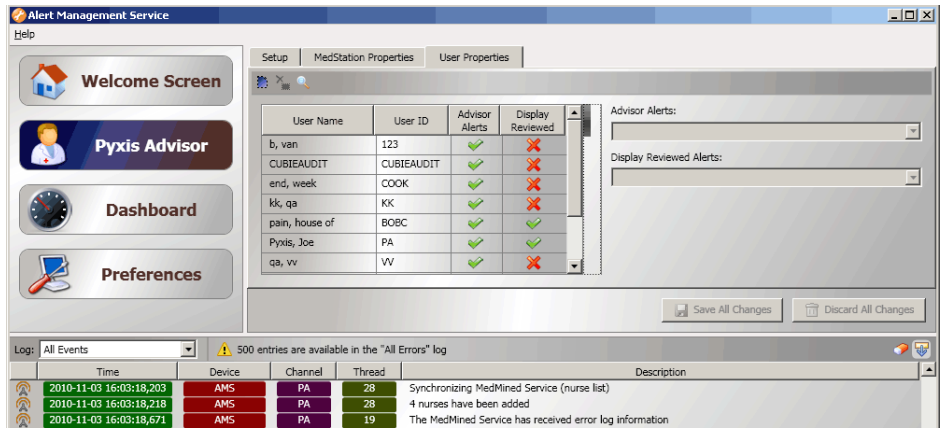
1. Click **Pyxis Advisor**.

The configuration dialog box appears with the Setup tab active. The Credentials section is for CareFusion only.

2. Click the **MedStation Properties** tab.
The stations at your site appear in the MedStation column.



3. In the Advisor Alerts column, click those stations that should display alerts.
Enabling alerts appears as a green check mark—which is the default setting; disabling alerts displays as a red x.
4. In the Timeout drop-down list, select from 30 to 240 seconds for each station.
5. Click the **User Properties** tab.



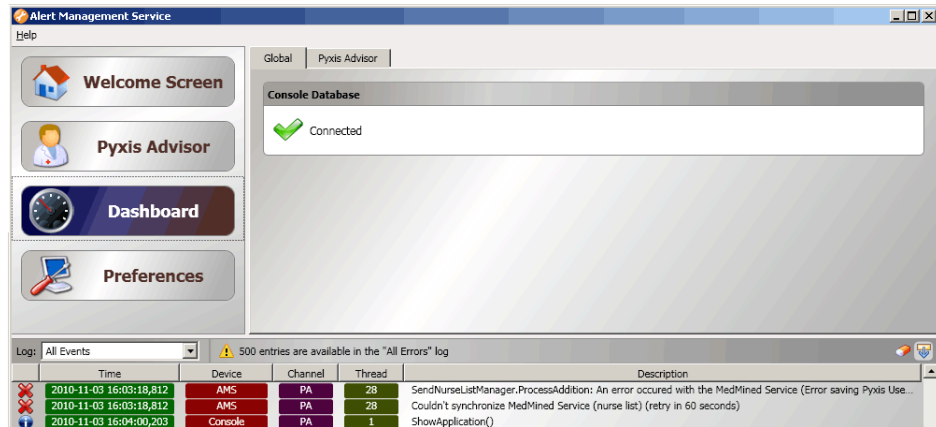
This dialog box shows the user and user ID with station access.

- a. In the Advisor Alerts column, click to configure whether the user account receives or cannot receive alerts. A green check shows the user can receive alerts. A red X shows the user cannot receive alerts.
 - b. In the Display Reviewed column, select the green check mark or red X—which is the default setting.
6. Click **Dashboard**.

This opens the dashboard dialog box. The Global tab verifies if the alert management service is connected to the console database or not.

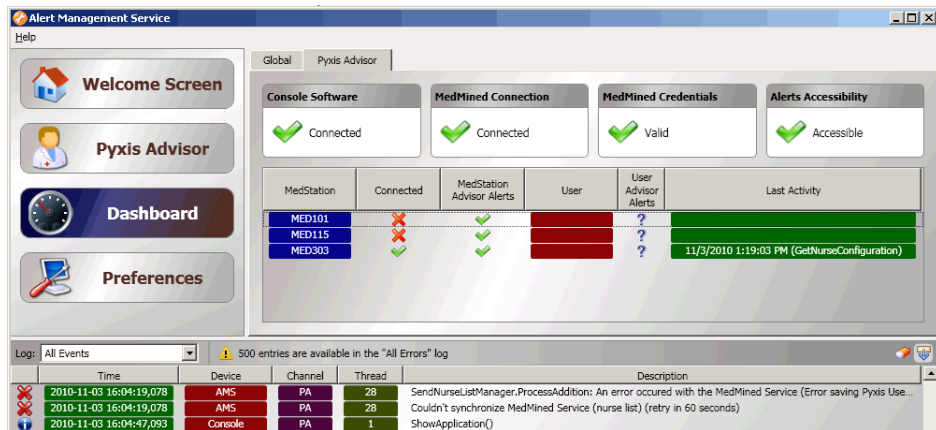
- A green check mark means it is connected.
- A red x means that it is not connected.

- A blue question mark means that the alert management service has not attempted to connect to the console database.



7. Click the **Pyxis Advisor** tab.

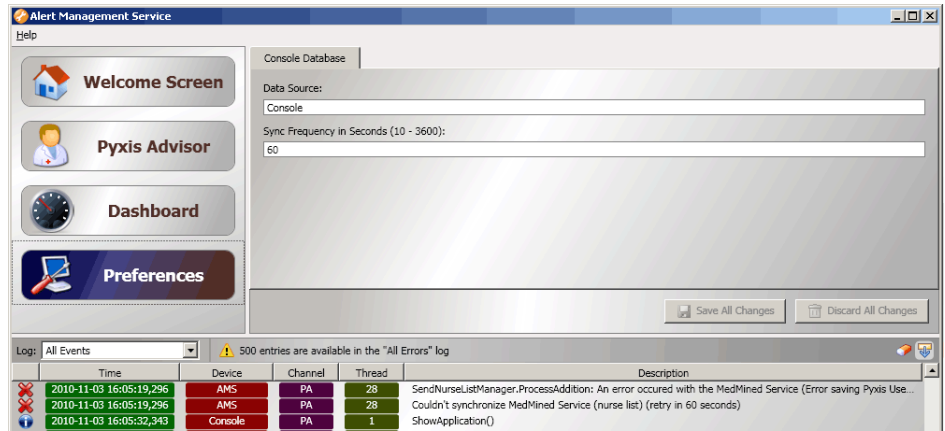
The Console PEA Configuration dialog box appears, providing information about the status of your system.



The bottom of the window contains information to help you understand any issues with the system.

8. Click **Preferences**.

The preferences dialog box appears.



9. In the **Data Source** text box, enter the console database name.

The Alert Management service obtains information from the console database configured as the data source:

- MedStations
- Patients
- Miscellaneous information

10. In the **Sync Frequency** text box, enter the value of the sync frequency field.

The Alert Management Service polls the console database to obtain site information at a rate equal to the value of the sync frequency field.

11. Click **Save Changes** or **Discard all Changes**, depending on your choice.
12. When done, exit the dashboard by clicking the exit button (**X**) at the upper right corner of the window.

Appendix C

Pyxis Nurse Link on the console

This section includes the following topics:

Pyxis Nurse Link Overview 200

CAUTION

Pyxis Nurse Link supports only user ID/password logins when this application is launched. If there are any positive identification requirements in your facility for features used within the Pyxis Nurse Link application, a backup process may be required for documentation.

Pyxis Nurse Link Overview

Pyxis Nurse Link is an integrated application that enables you to view, select, and queue orders. The Pyxis Nurse Link application is used in the hospital environment to enable the clinician to review necessary medication information.

Using Pyxis Nurse Link, you can queue medications for timely dispensing and also display patient alerts provided by the MedMined™ Patient Event Advisor system. The Remote Waste feature allows you to document medication waste remotely. During implementation, CareFusion representatives will add a new device called **NURSELINK** that will enable Pyxis Nurse Link functionality.

Waste Process

Pyxis Nurse Link displays and processes all remove transactions and transfer transactions performed at the station. It allows the user to select a remove transaction or medication to document waste remotely through three methods—Removed Meds, All Meds, and Undocumented Waste.

Removed Meds

The remove transaction list displays a list of removed items from the Pyxis MedStation 4000 system or the Pyxis Anesthesia System for the selected patient.

All Meds

List displays all medications in the formulary.

Undocumented Waste

Undocumented Waste lists all remove transactions in which the removed quantity is greater than the ordered dose.

Waste Information

The key waste information exchanged between the Nurse Link application and the Pyxis MedStation system includes the following:

- **Removed Amount (Removed Quantity)**—the amount removed from the MedStation.
 - This field is required for medications listed on the All Meds tab.
 - This field is a displayed field for the Removed Meds tab.
- **Given Amount (Administered Amount)**—the amount given to the patient.
- **Waste Clinical Data**—displays clinical data categories for remote waste. Requires clinical data categories to be activated for the Pyxis Nurse Link device.

Role-Based Queuing

This feature allows hospitals to identify roles and users that can and cannot use the Remote Queue and Waste functionalities of the Pyxis Nurse Link application. The user has the ability to view all patient information.

Using remote privileges

1. Select **System Setup > Users**.
2. In the Users dialog box, click **Edit**.

The Edit User dialog box appears.

Edit User sachdev, deepti. Last Activity was Sat Oct 30, 2010 12:31
 User ID: DS Password: ***** Expiration: Sun Oct 30, 2011 00:00
 Confirm Password: *****
 Name: sachdev, deepti ID valid until: 12/31/2037 @ 03:00
 Initials: Title:
 Areas: Console Privileges | Station Privileges | Med Privileges | Remote Privileges
 Available:
 Current Selection: AMEMORIAL, ANES, ANESLD, BASIC-ED, CATH LAB, CCU, C-DIALYSIS, CDU, CGOH-2R, CGOH-ANES, CGDH-CGCC, CGOH-CMSU
 BioID:
 Use BioID
 Use Password
 Privilege Template: NONE. Assign Template
 Save Cancel Delete Reset BioID

3. Click the **Remote Privileges** tab.

Edit User sachdev, deepti. Last Activity was Sat Oct 30, 2010 12:31
 User ID: DS Password: ***** Expiration: Sun Oct 30, 2011 00:00
 Confirm Password: *****
 Name: sachdev, deepti ID valid until: 12/31/2037 @ 03:00
 Initials: Title:
 Areas: Console Privileges | Station Privileges | Med Privileges | Remote Privileges
 Remote Access Privileges:
 Queue
 Waste
 Privilege Template: NONE. Assign Template
 Save Cancel Delete Reset BioID

Check the **Queue** and/or **Waste** boxes, as needed.

Adding remote privileges to a template

Follow the template setup steps in the *Users* section on page 66 of *Chapter 3, Setting Up the System*. The new Remote Privileges tab appears during template edits and adds.

Appendix D

Management and Monitoring Recommendations

The Pyxis MedStation system is designed to help support the facility's quality assurance efforts, as well as to aid the facility in meeting the expectations or requirements of accrediting and regulatory agencies, such as the The Joint Commission, the DEA, the state board of pharmacy and the state bureau of drug control. This information is purely advisory and final recommendations should be tailored to the institution's individual needs. This section includes the following topics:

<i>Security recommendations</i>	204
<i>System configuration recommendations</i>	206

Security recommendations

This section includes the following topics:

- *General recommendations* on page 204
- *Controlled medications* on page 205

General recommendations

The following list provides some general guidelines:

- Maintain a strict procedure for assignment of user IDs and initial passwords. Include in the procedure a description of how a user gets a password if it is forgotten.
- Assign each user a unique temporary password upon initial use of the system.
- Assign access to controlled drugs only to authorized personnel.
- Restrict the ability to create temporary users to as few persons as possible and closely monitor temporary user creation.
- Limit the assignment of station access in All Areas to only those individuals who require this level of access.
- Instruct and permit users to change password immediately if password confidentiality is compromised. Consider requiring password changes on a periodic basis.
- Maintain a system to immediately remove users upon termination of employment along with a regular review of users by each area manager.
- Depending on state requirements, consider making stations and auxiliaries stationary by fastening them to the wall.
- Avoid keeping emergency medications (such as the crash cart) exclusively in the stations because this might compromise user accountability during an emergency situation.
- Store the station keys for emergency access in the pharmacy safe or vault and account for them on a regular basis. Maintain a system of accountability for access to the keys.
- Remain with the CareFusion representative at a station at all times when it is necessary for the technician to access drawers. Reinventory controlled substances in the station upon completion of service.
- Maintain a log of required Pyxis MedStation system service along with a permanent file of all Pyxis MedStation system service records (copy provided by the CareFusion representative).
- Consider the need to shred printouts based on facility confidentiality procedures.

Controlled medications

The following list provides guidelines for working with controlled medications:

- Use individual pocket access (MiniDrawers, CUBIE® pockets, or Carousel drawers) for all controlled drugs (Schedule II-V).
- If necessary, store refrigerated controlled substances in a locked refrigerator (for example, Pyxis SMART Remote Manager).
- Place keys in a Carousel drawer in the station to control and document key access.
- Load all controlled drugs into stations, even special patient-specific orders.
- Inventory controlled drugs in each station on a periodic basis (for example, weekly).
- Activate the Verify Count option for all formulary items that are controlled substances.
- Maintain a system utilizing stations for controlled substance drips, including PCAs, which meets state requirements.
- Archive Pyxis MedStation system data and maintain a hard copy of console and station reports as required to comply with state and federal requirements.
- Implement and enforce facility policies and procedures to handle discrepancies involving all controlled substances.

System configuration recommendations

This section includes the following topics:

- *Drawer configuration and medication location* on page 206
- *Control the station formulary list* on page 206
- *Order entry and verification* on page 207
- *Medication distribution* on page 207

Drawer configuration and medication location

The following list provides guidelines for configuring drawers and deciding where to place medications:

- Consider using individual pocket access (MiniDrawers, CUBIE pockets, or Carousel drawers) for most medications, restricting the use of matrix drawers to floor stock medications, over-the-counter drugs, and those medications which have minimal, if any, clinical risk.
- Consider keeping internal and external preparations clearly separated.
- Avoid placing medications with similar appearance or similar names in the same matrix drawer and certainly not in proximate pockets.
- Separate injectable drugs as much as possible, especially those in similar containers (for example, vials).
- Place more commonly used medications in top drawers for easy access.
- Emergency medications (such as code blue items) should not be kept exclusively in stations.

Control the station formulary list

The following list provides guidelines for managing the formulary list:

- If distributing nearly all medications via the MedStation profile-mode system, consider activating the Display options with a value of ALWAYS at the console for the entire formulary.

Virtually all ordered medications appear in the patient's profile at the station when entered/verified by pharmacy regardless of whether or not they are loaded. Nursing is then aware that the order has been entered/verified by pharmacy. Only ordered medications with Display Options set to ALWAYS appear on the Ordered Meds Not Loaded report at the console, located in the pharmacy.

- If distributing a limited number of formulary medications via the Pyxis MedStation profile-mode system such as controlled substances and floor stock, consider setting the Display options to Always for routine facility-wide

items and to Only When Loaded for the remainder of items (that is, nursing unit specific).

Only those ordered medications loaded at the station display in the patient's profile when entered or verified. (The "Med not loaded" message seldom appears.)

Order entry and verification

The following list provides guidelines for entering and verifying orders:

- Configure the host pharmacy system to send orders to the Pyxis MedStation profile-mode system console only upon entry or verification by a pharmacist.
- The nurse should also verify that the pharmacy order (medication, dose, route, schedule) appearing on the station against the written patient record at the time of removal.
- Always consult the original physician's written order for clarifications on medication therapy.

Medication distribution

Often, no specific regulations or recommendations related to the management of automated distribution systems exist. If this is the case, consider the following approaches, which are based on common practices of MedStation users:

- Technicians pick and prepare medications for load or refill into a station under the supervision of a registered pharmacist. The pharmacist checks medications prepared by a technician before they are placed into a station.
- Stations are physically loaded or refilled by trained technicians. For certain medications with the RxCheck feature enabled, the system prompts for a another user to check the pocket after it has been loaded or refilled.
- Nurses are instructed to report any suspected load or refill error to pharmacy. The exact procedure for reporting is defined.
- Pharmacists maintain an ongoing quality monitoring program to review technician load/refill activities.

Example quality monitoring process for the pharmacist:

- Following technician load/refill activities, periodically print Loading and Unloading and Med Refill reports.
- Compare the Med Refill report activities with the Refill Pick and Delivery report used by the technician.
- Monitor load and refill accuracy for medications requiring RxCheck. On an ongoing basis, check other pockets randomly to verify that the correct medication has been refilled/loaded into the correct pocket and keep records of such inspections.
- Pay extra attention to load, refill, and Rx Check activities of newly trained personnel.

Glossary

Admissions, Discharge, and Transfer (ADT)

Records for a patient or group of patients. The ADT information is sent from the facility's computer system to the console via the Pyxis Procar computer translator interface.

Bin

Bins are open trays, 4 inches tall and 23 inches deep, in a variety of widths used to organize and control storage in a large auxiliary.

Bin Drawer

A flexible matrix drawer that is twice the height of a single drawer and can be configured as one large bin. A bin drawer is useful for storing large items such as IV bags.

BiID

A feature that confirms your identity by checking the your logon ID and fingerprint. This physical user verification eliminates the use of passwords or swipe cards that can be lost, stolen, or shared with unauthorized individuals.

Blind Count

Blind Count is a device and formulary option that requires you to confirm inventory counts. You are not prompted with the current inventory level.

Brain Transplant

A metaphor for the procedure of using the console's up-to-date stored information to restore or correct a station's database.

Carousel Drawer

A circular drawer that is separated into 2, 4, 6, 8, or 12 pie-shaped pockets. These drawers are used for protecting controlled substances because only the one pocket containing the selected medication is revealed whenever the drawer is opened. The 6-pocket drawer includes a return bin.

Clinical Data

Clinical data might be required when removing a medication, for example, for patient location or blood sugar level. This option is set at the console for specific medications.

Clinical Data Categories (CDCs)

Present or gather information from nursing. Formulary items can be configured at the console to require the nurse to enter clinical data (such as route of injection, observations, and evaluation data) for a medication when it is removed, returned, or wasted.

Combination Dose

Combination doses require the removal of more than one item to fulfill the medication order. For example, cefazolin 1 gram Add-Vantage and the D-5-W 50 ml Add-Vantage minibag.

CUBIE pockets

These pockets are separated into two half-height drawers designed to occupy one regular drawer slot. CUBIE pockets have three available pocket sizes that can be configured by the customer. These pockets are ideal for any type of controlled or non-controlled medication and provide single drug access.

Discrepancy

During a medication count verification, if the amount found does not match the amount expected by the system, a discrepancy exists.

Equivalency or Equivalent Dose

An equivalent dose is a certain strength of a formulary item defined by the pharmacist as equivalent to multiples of another strength of the same generic item. For example, two 40 mg furosemide tablets might be defined as equivalent to one 80 mg furosemide tablet.

Facility

A facility code entered at the Station Configuration screen at the console to identify multiple facilities for billing.

Formulary

A database of all pharmaceuticals used by the facility in any Pyxis MedStation system. The formulary must be created and maintained by pharmacy personnel for medications to be loaded and refilled in the stations.

Frequency

The ordered interval for the medication as received from the host pharmacy system.

Global Edit

A feature at the console which allows you to modify multiple stations, users, or formulary items at the same time.

Interface

Refers to the translation of information from a facility's computer system to the Pyxis MedStation system. Information obtained through the interface includes patient admissions, discharges, transfers, billing data, and pharmacy profile.

Inventory

Includes medications that are selected to be loaded into a station from the master, or console, formulary. The inventory process is used to count and verify medications.

Kit

A group of medications defined in the system that are commonly used together to treat a patient, usually in association with a specific procedure or treatment. Also refers to the kit feature which is used to create and edit kits at the console or station.

Large Auxiliary

A large auxiliary has the same width and depth as the station, but is 78 inches tall and has four transparent doors. Two, three, or all four doors can be connected together as one, allowing storage and access for bulky supplies or tall items. This modular unit is connected to a station, thus becoming a physical extension of the station. Auxiliary units contain no screen, printer, or disk drive, and are intended for storing additional medications and, depending on the model, bulky medications.

Lead and Lag Times

When an order is created for a patient, it has associated start and stop times, which determine the period of time that the order is active. Access lead and lag times extend the period that an order is active. Access lead is the number of hours (from 0 to 24) before the start time that an order is active.

Load Medications

Process of loading medications into the station after the inventory has been set up or modified.

Maintenance

This process occurs every 24 hours, usually late at night, to purge unneeded data from the console databases.

Matrix Drawer

An uncovered station drawer with adjustable pocket separators which allow you to alter the size of pockets after the station arrives on-site. These drawers are usually used for stock, PRN, or non-controlled substances. Up to 48 pockets are available.

Matrix Mode (MiniDrawer)

The drawer is treated as a regular matrix drawer. Each pocket can be assigned a different medication. This mode maximizes the number of different medications stored in the drawer.

Medication Charting

Medication-charting information is routinely collected when medications are removed from the station. The system has the ability to pass this information electronically to nurse-charting systems. These fields include injection sites, observations, and other medication-specific data.

Min Level

The minimum level, an important trigger number, is the optimum stock level that you designate to indicate when a specific medication should be refilled. If a medication's stock falls at or below the minimum level, it shows up in the pharmacy reports for refill. The minimum levels can be adjusted to reflect changing patterns of usage and demand.

MiniDrawer

Two configurations of MiniDrawers are available, each fitting in one drawer slot. The 6-tray MiniDrawer (1–6) has basic pocket dimensions of 8 inches wide by 1.33 inches high. The 18-tray MiniDrawer (1–18) has basic pocket dimensions of 2.48 inches wide by 1.33 inches high. Various pocket configurations (1, 2, 3, 4, 6, 12) are available within the 6-tray and 18-tray MiniDrawers. Three dispensing modes are available: single-dose, multi-dose, and matrix.

Multi-Dose Mode (MiniDrawer)

All pockets in the drawer must be assigned the same medication and each pocket can contain a varied quantity of that medication. This type reduces the number of medications that the nurses must count. When a pocket is emptied, the drawer opens to the next pocket.

Order

A medication that has been prescribed by a doctor and approved by the pharmacy for a specific patient. Orders are usually entered into the console, located in the pharmacy or hospital-pharmacy profile system and appear at the appropriate station at or before the start time.

Order Notes

Additional order details or directions received from the host pharmacy system.

Outdate

The process of removing expired medications from the station.

Override

Override is the process by which a nurse removes a medication from a station for a patient that is not part of the patient's profile. This is done using the Override button at the profile station. Whenever a patient's profile is overridden, this information appears on the transaction slip and on various reports. Sometimes a witness is required to allow a patient's profile to be overridden.

Patient Profile

See *Profile Option (Profile Mode)*.

Pending Medications

Medications that have been assigned at the console to station pockets, but have not been physically loaded.

Pocket

The basic storage unit, a space in a drawer containing one medication. Carousel drawers can contain 2, 4, 6, 8, or 12 pockets. Matrix drawers can contain up to 48 defined pockets.

Polling

Refers to the continuous communication between the console and the station. The console polls all stations with Polling enabled, in turn, providing updated information to the appropriate station and gathering information from the station as actions, such as removing medications, are taken.

Pyxis Advisor

Pyxis Advisor builds on the Patient Event Advisor (PEA) platform, alerting nurses at the station when patients are at risk for potential adverse drug events.

Pyxis Nurse Link

Pyxis Nurse Link is an integrated application that enables you to view, select, and queue orders. The Pyxis Nurse Link application is used in hospital environment to enable the clinician to review necessary medication information.

Pyxis Procar Computer

A PC connected to the console. It is responsible for interface communications, including the pharmacy software system link (patient orders and other pharmacy profile information), admissions, discharges, transfers, and billing information. The interface communications software is developed,

configured, and installed by CareFusion technicians to coincide with the installation of the Pyxis MedStation system.

Profile Option (Profile Mode)

The Profile option is available on the Pyxis MedStation system. The patient medication profile is a source of information for the pharmacist and the nurses that consolidates all information about a patient's drug therapy. The profile helps the pharmacist monitor drug distribution, prevent potential drug interactions, and bill medication charges. Nurses also use the profile to schedule medication administration.

Quick Keys

Key sequences (such as ALT+M) that are used to perform functions in the system. To use a Quick Key, simultaneously press ALT and the underlined letter on the screen.

Recommended Standard (RS)

Refers to a communication method for linking remote stations to the console.

Refill

A procedure designed to replenish inventory in the stations.

Remote Stock

Items managed by the Pyxis MedStation system but stored outside the station.

Remove by Time

Allows the nurse to remove medications for a patient based on the scheduled time of administration. It is dependent on dosing times provided through an interface with the host pharmacy system.

Return

This procedure allows you to return a medication and credit the charge to the patient. Returns go into a Return Bin and are not available for redispensing. Returns of controlled substances usually require a witness.

Return Bin

A reserved pocket in a drawer that has a one-way door. Use it to return unused medications in tamper-evident packaging.

Return to Stock

This option, set at the console by the system manager for each medication, allows a medication to be returned to its original pocket. Return to Stock can be turned on or off for a station.

Route

The route is the method of administration (PO – by mouth, IM – intramuscularly, TOP – topically) for an ordered medication as received from the host pharmacy system.

Rx Check

A process where refilled and newly loaded medications are checked at the station by a pharmacist or another designated person.

Rx Mode

See *Profile Option (Profile Mode)*.

Security Group

Each formulary item defined in the Pyxis MedStation system must have one of ten security groups associated with it. The security group is a tool that you can use to control which medications your users can access when you subsequently assign them security group privileges.

Shelf

The adjustable, heavy-duty wire frame used in a large auxiliary. A large auxiliary can be configured with up to 12 shelves.

Single-Dose Mode (MiniDrawer)

The single-dose mode is one of three dispensing modes available for a MiniDrawer configuration. All pockets in the drawer must be assigned the same medication, and each pocket can contain no more than one medication. This type is used to allow access to only the number of doses requested.

Standard Stock

Standard stock consists of standard medications that are frequently used in the clinical setting where the station is located. Standard stock medications are kept in the station at all times.

Start Time

When an order is created for a patient, it has associated start and stop times. The start time controls when the ordered medication is displayed in the patient's profile at the station (when the order becomes active).

Station

A cabinet device that stores medications and supplies and allows the removal of such items through a computerized inventory and ADT system. It is connected through a communication link with the console.

Stop Time

When an order is created for a patient, it has associated start and stop times. The stop time controls when the ordered medication is deleted from the patient's profile at the station (when the order is no longer active).

System Administrator

A key individual, usually a pharmacy manager or other pharmacy worker, who is responsible for the Pyxis MedStation system.

System Manager

A nurse or pharmacist who has attended a comprehensive training class offered by CareFusion and is responsible for configuring the Pyxis MedStation system to meet the needs and goals of the facility.

Temporary User

An individual set up at the station and with access privileges that expire in 12 hours. This is useful in situations where permanent user privileges cannot be quickly set up at the console or where you do not want permanent access.

Transaction Queue (XQ)

The accumulation of messages waiting to be communicated to the console, station, or Pyxis Procar computer.

Tray

The component of the MiniDrawer that contains pockets.

Uninterruptible Power Supply (UPS)

A power storage device connected between the console and wall electrical outlet. It detects power loss from the outlet and immediately provides the console with approximately 15 minutes of power. The UPS beeps continuously to warn of the power failure.

Variable Dose

Allows the pharmacist to address the issue of range dosing by defining dosage choices for the nurse based on a single order. For example, to fulfill an order for Morphine Sulfate 4–10 mg injection (Inj), the nurse must select from 4 mg, 8 mg, or 10 mg syringes depending on the patient's pain level. A variable dose of Morphine Sulfate 4–10 mg Inj allows the nurse to select any one of the defined sizes stocked at the station.

Verify Calc

This feature helps prevent medication errors that could occur from math errors by a nurse in calculating strength/volume. Pediatric doses typically use liquids, so math errors can easily occur. For example, if Tylenol is packaged as 325 mg per 100 ml, how much liquid should be injected for an order of 65 mg? Verify Calc shows two proportional fractions on the screen. The first fraction is 325 mg/100 ml. The second fraction is where you provide your input. If you type in 65 mg, 20 ml is immediately shown as **Your Calculated Volume**. Vice versa if you know the milliliters, but need to know how many milligrams. If you then input 20 ml, **Your calculated mg = 65** is shown instead.

Verify Count

A Device and Formulary option that requires you to confirm inventory levels of identified medications.

Volume Calculation

When the Volume Calculation option is set at the console for a particular formulary and device, the Verify Calc button appears at the bottom of the Remove screen. By touching Verify Calc, you can automatically calculate the

correct strength or volume. For example, if Tylenol with codeine is packaged as 120 mg per 10 ml, how much liquid should you administer for an order of 15 mg? Touch Verify Calc. When the Volume Calculation screen appears enter the ordered milligrams. The system dynamically calculates the volume, 1.25 in this example, which appears on the screen. After touching Continue, the calculated value displays on the Remove screen and print slip. Calculated results always drop trailing zeros (but show a leading zero if calculated value < 1). Standard display is to three decimal places.

Waste

The process for discarding a medication might require a nurse witness for controlled substances.

Waste While Removing

This option is set at the console by the system manager for each medication and allows medications to be partially or fully wasted during removal.

Witness

Discrepancies at the station and certain kinds of access (for example, to override a patient's profile) require a witness to observe the transaction. Any user with access to the station can act as a witness. Some access privileges allow the resolution of discrepancies without a witness.

XQ

See *Transaction Queue (XQ)*.

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