



# Pyxis MedStation™ 4000 System

## Station User Guide

November 2010

**Part Number: 127158-06**

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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 Notice

This device complies with Part 18 of the FCC rules.

## Canadian Notice (Avis Canadien)

This ISM device complies with Canadian ICES-001.

Cet appareil ISM est conforme à la norme NMB-001 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 stations.

This guide does not cover service and repair procedures. It focuses on the daily use of the system, as well as minor maintenance, and troubleshooting.

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.

# Chapter 1

## Basics

This section includes the following topics:

<i>Getting started</i> .....	2
<i>Using the system</i> .....	8
<i>Features and functions</i> .....	10
<i>Using common procedures</i> .....	14

## Getting started

This section explains how to enable power to a station and log in to the system. It also describes the main menu screen and the features and functions of the station user interface.

### NOTE

The examples used throughout this guide show screens with full access privileges and most console and station options turned on. The screens you see on your system may vary depending on your access privileges and option settings. Options that are shaded are enabled, but are not available to you due to your user-level access privileges.

## Turning on a station

On and off switches have different locations on the various station models. The following table provides operation information about the specific models:

Model	Information
Drawer	Most on/off switches are located on back of the unit. On a single-column chassis, they are about 4 inches (10 centimeters) from the upper-right side when facing the unit. The switches are toggle-on and toggle-off devices.
Door	Most on/off switches are located on top of the unit toward the front. On a single-column chassis, they are about 4 inches (10 centimeters) from the upper-left side when facing the unit. On a double-column chassis, they are in the center of the unit. The switches are push-on and push-off devices. The switch closest to the front of the unit controls the lights. The switch behind the front switch controls the internal logic boards and computer.
Auxiliary	Some auxiliary models do not have an on/off switch. On the models that do, the switch is located on the front of the power-supply box. This switch is under the bottom wire shelf, about 4 inches (10 centimeters) from the right side when facing the unit. The switch is a rocker on-off device. Power is supplied to the logic boards on each shelf when the switch is in the on position.

## Logging in

### 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.

Only authorized users can access the station. The system administrator can assign each station one of the following modes of access:

- User ID and private password access
- User ID and BioID
- User ID, private password, and BioID
- User ID only access

Log in to begin using the system. Logging in verifies your identity and access privileges before you are allowed to access the system and allows the system to track your transactions.

To log in, enter your unique user ID and password. If your station is configured to use BioID, the system prompts you to scan your fingerprint before you can log in. You can configure the station to use the fingerprint scan in addition to or instead of a password.

When you log off, or when the system has been inactive for a predetermined period of time, the standby screen appears until the next user logs in. Log in to the system from the standby screen.

### **To log in**

1. Touch the standby screen or press any key on the keyboard.
2. In the Login screen, use the station keyboard or touch screen to enter your user ID and press **Enter** on the keyboard.

The screen that appears depends on your security privileges and the preferences selected on the User Preference screen at the station. The default is the Main Menu screen. To change the default screen, modify your user preferences.

## **Using BioID**

BioID is a means of positive identification. When set up to use BioID, the system scans your fingerprint and compares it to an image registered with the system.

After BioID is activated at the console for a station, the system requires you to complete the registration the first time you log in at that station. This one-time process enables you to register your biometric information in the MedStation system. After successfully registering in the system, you have BioID logon rights at each station where you have access privileges.

### **Registering BioID**

To register, three fingerprint images at the BioID scanner are required. The system continues to request your BioID logon on every logon attempt until the system administrator changes your settings at the console. Use the following techniques to log in successfully:

- Cover the entire scanning lens with your fingertip.
- Consistently position your finger on the scanner.

- Apply firm, consistent pressure on the scanner.

### To register your BioID

1. Touch the standby screen. Enter your user ID and press **Enter** on the keyboard. A dialog box appears asking if you want to register your fingerprint.
2. Click **YES** to continue.
3. Enter your password in the Register BioID screen. Press **Enter** on the keyboard.
4. Press **Scan** to begin the registration process.  
If you press **Cancel**, you will be returned to the standby screen. The REGISTER Pyxis<sup>®</sup> BioID screen appears.
5. Follow the screen instructions to register three fingerprints of the same finger. A video image on the screen displays either arrows or circles in the upper left corner to guide you in positioning your finger correctly on the scanner.

#### NOTE

Red arrows provide feedback showing you which direction to move your finger in order to ensure optimal positioning.

A green circle means that your finger is optimally positioned.

A red circle means that the scanner cannot detect the presence of your finger.

6. Center your finger on the lens and press firmly.  
The scanner flashes brightly as it takes an image, and a grayscale image of your fingerprint will appear in the window on screen. Do not remove your finger from the scanner until the grayscale image appears.

The system begins processing the scanned fingerprints.

#### NOTE

If the system does not respond, remove your finger from the lens and place it back on the lens.

#### NOTE

The scanner will time out after 15 seconds of inactivity. In the event of a time out, all previously captured fingerprints will be cleared. You will need to begin the scanning process again.

If your fingerprint does not match the previous scan(s)—for example, if you scanned two different fingers—a dialog box appears informing you that the fingerprint does not match.

The system clears all previously captured scans, and you will be required to start over.

7. Touch **OK** to begin scanning your fingerprints again.

8. A confirmation message appears when three successful scanned prints have been captured, indicating that you have successfully registered your fingerprint identification. Click **OK**.

**NOTE**

If the first attempt fails to register the fingerprint, touch **Yes** to attempt the registration process again or touch **No** to log in with your password. If you are having trouble, try scanning a different finger. Depending on the console settings, a witness may be required to continue logging on with a password in the event of a failure.

If the console is set to require a witness, touch **Yes** to continue. A witness must be configured to access the station in order to complete the witness process successfully.

**Logging in with BioID**

The following procedure explains how to log in using BioID.

1. Press **Enter** on the keyboard.
2. Enter your User ID and press **Enter** on your keyboard.
3. The User BioID Authorization screen appears, and the blue LEDs light on the fingerprint identification device. Follow the directions on the screen for placing your finger.

**NOTE**

The scanner will time out after 15 seconds of inactivity. In the event of a time out, you will be returned to the standby screen.

If the station is able to successfully verify your fingerprint scan, the Main Menu screen appears.

**Logging in after a BioID logon failure**

If the station fails to verify your fingerprint scan, a message appears stating that the scanner was unable to verify your fingerprint identification. The system prompts you to retry, reminding you to cover the scanner completely and to press firmly.

After the third failed verification attempt, the system defaults to the password prompt. Depending on system configuration, you may need a witness to gain access to the station.

**Witness after a BioID logon failure**

If a witness is required when a user logs on after a BioID failure, the witness confirms your identity.

1. Enter your user ID and password and press **Enter** on the keyboard.
2. In the confirmation message that appears, touch **Yes** to access the system with a password and witness or touch **No** to logon using BioID.



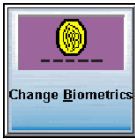
- If you touched **Yes**, have the user enter his or her user ID in the Witness screen that appears. The witness will be required to verify using his/her preferred method of logon.
- If you touched **No**, complete the steps listed in the *Logging in with BioID* on page 5 to access the station.

**NOTE**

The scanner will time out after 15 seconds of inactivity. In the event of a time out, the witness will be required to re-enter his/her user ID.

**Re-registering your BioID**

On occasion, it may be necessary to re-register your BioID. For example, if you cut your finger, you may need to reset your BioID using a different finger.



1. Log in to the station.
2. In the Main Menu screen, touch **User Menu**.
3. In the User Maintenance Menu screen, touch **Change Biometrics**.
4. When the Register BioID screen appears, repeat steps 6 through 8 from the *Registering BioID* section.
5. In the User Maintenance Menu screen, touch **Main Menu**.

**Logging off**

When you are finished using the station, log off the system.

- In the upper-right corner of the screen, touch **Exit**.

**NOTE**

If you initiate an activity that requires a response, such as closing a drawer, the system prompts you to complete the activity before allowing you to log off.

If the station is inactive for a predetermined period of time, the system automatically reverts to the standby screen, even if you have not logged off. However, you should always log off when you leave the station to ensure that transactions are not performed by others using your user ID.

## Changing your password

The first time that you access the station, use the password assigned to you by the system manager. If your user ID on the console is set to Expire Initial Password, the system prompts you to change your password the first time that you log in.

You can also change your password at any time as a safety measure or when you are notified that your password is about to expire.

1. In the Main Menu screen, touch **User Menu**.
2. In the User Maintenance Menu screen, touch **Change Password**.
3. In the **Current Password** box on the New Password screen, enter your existing password and press **Enter** on the keyboard.
4. In the **New Password** box, enter your new password and press **Enter** on the keyboard.
5. In the **Confirm Password** box, enter your new password again and touch **Accept**.

## Using the system

Access all station activities from the Main Menu screen. The Main Menu screen is the default screen that appears after you log in. You can use User Preferences in the User Menu to change your default screen.

The Main Menu screen may have fewer buttons depending on your user privileges and the available functions.



The Main Menu screen consists of three sections:

- **Patient Care**—Provides access to the Remove, Return, Waste, Patients, and Patient Summary functions at the station. Instructions for these functions are included in *Patient-Care Functions* on page 21.
- **Med Management**—Provides access to the Load, Refill, Inventory, Unload Menu, Rx Check, and Outdate functions. Instructions for these functions are included in *Medication-Management Functions* on page 55.
- **Station Management**—Provides access to the Kits, Reports Menu, User Menu, System Menu, Document Discrepancy, and Recover Drawer functions. Instructions for these functions are included in *Station Management Functions* on page 77.

### NOTE

Screens in the rest of this user guide will be cropped off at the top to focus on the procedures.

## Using additional tools

At any time, you can access the following options by touching the CareFusion logo in the upper-left corner of the screen:

- **Comm Status**—Displays the status of communication between the station and the console.
- **Print Screen**—Prints the current screen.
- **Suspend**—Temporarily removes access to the station. Access is reestablished by pressing CTRL+ALT+F10.
- **Lexi-Comp**—Enables you to search and retrieve drug information.
- **Patient Medication Information**—Print patient-friendly medication information leaflets.
- **Tutorial**—Provides a tutorial that includes the basic steps of the major tasks available at the station.
- **MedStation Help**—Provides comprehensive procedures for using the MedStation system.
- **About**—Provides version and copyright information on the station.
- **PEA Dashboard**—Patient Event Advisor (PEA) button opens the Alert Notification Service dialog box



## Features and functions

This section gives an overview of the features and functions of the station user interface.

### Touch screen

The keys on the screen are touch sensitive—a gentle touch is adequate. These touch keys can substitute for the computer keyboard, or you can use a combination of both the touch screen keyboard and the computer keyboard.

In the station screen, you can make selections, touch action buttons, or place the cursor into the data entry fields by touching the selection, button, or field on the screen. Functions that require you to enter numbers, such as entering a count when removing a medication, also provide a touch-sensitive number bar on the screen where you can touch the number on the screen to enter it, rather than using the keyboard.

If you need to change or delete text already entered in a field, highlight the text by double-touching the field or sliding your finger across the text and then retype the correct data or press Delete on your keyboard.

### Touch keyboard

To display the on-screen touch keyboard:



- In the lower-left corner of the Login screen, touch the keyboard icon.

### Physical keyboard

You can use the keyboard to access any function on the touch screen. The up and down arrows allow you to quickly scroll through lists.

### Quick key








You can select a menu or button by pressing ALT and the key corresponding to the underlined letter.

For example, from the Return Medications screen, you can use key sequences (quick keys) to perform the following actions:

Action	Shortcut
Sort Patients by Name	ALT+N
Sort Patients by ID	ALT+I
Add a New Patient	ALT+A
Return to the Main Menu screen	ALT+M

## Alert icon

Alert icons appear in the lower-right area of the Main Menu screen to notify you of the following situations:

Icon	Meaning
	<b>Brain Transplant</b> —Signals that files are being sent from the console to the station.
	<b>Discrepancy</b> —Signals an undocumented discrepancy.
	<b>Recover Drawer</b> —Signals a failed drawer in need of user attention.
	<b>Critical Override</b> —Signals that the station is currently in Critical Override mode.
	<b>Rx Check</b> —Signals that medications have been loaded or refilled but have not been checked by the pharmacist.
	<b>Communication Status</b> —Signals that there is no communication taking place between the station and the console.
	<b>Maintenance</b> —Signals that maintenance is in process.

## Sort button

Sort buttons sort information in a pick list according to a category. To change the order of a displayed list, press the sort button by touching it. The selected button is dark blue and the text is highlighted. Selecting one turns off the others.

Select an option button in one of the following ways:

- Touch the button.
- Press ALT and the underlined letter using the computer keyboard.

## Global Find and Remove

### NOTE

Global Find and Global Remove are determined by your facility to be individually turned off or on. If Global Find is turned off, the Global Find button is not available. If Global Remove is turned off, the function can no longer be initiated from the Review Order screen. Contact your TSC to enable or disable these features.

With the appropriate privileges, you can access Global Find from the main menu. This feature searches for specific medication using a standard search list and then locates which stations have that medication loaded and in what quantities.

Global Remove is an extension of the Find feature. It is accessible during the Remove process only from the Review Order screen.

### Locating Medications at Other Stations

1. If the medication you want is not loaded at your station, the medication is shaded. Click the shaded medication to review your order.

Global Find looks through the system to locate your medication at another station, if available.

2. If your medication is found, select a station from the list that appears on the screen.
3. Select the **Send Patient Order**. This sends the patient order to the chosen station to enable you to remove your medication from the other station.

You can remove your medication from the first available drawer or pocket that contains the item at the station you selected.

### Using the Global Find Feature

1. Select **Global Find** from the main menu.
2. Select the appropriate medication.
3. Select **Find** to display the list of stations that currently have that medication loaded in a quantity greater than 0.
4. The generated list indicates the station name, station area, drawer status, and user access.
5. The stations are displayed in black, gray, or red type. These colors indicate the following information:
  - a. Black Type—you have access to that medication in that station.
  - b. Gray Type—you do not have access to that medication in that station.
  - c. Red Type—the medication is located in a failed drawer or pocket in that station.

### Using the Global Remove Feature

1. Select the shaded medication.

This opens the Review Order screen.
2. Select the shaded medication to display the list of profile stations that currently have that medication loaded in a quantity greater than 0.

The generated list indicates the station name, station area, drawer status, and user access.

Stations are listed in numeric order, then alphabetic order.
3. The stations are displayed in black, gray, and / or red type.

These colors indicate:

  - a. Black Type—you have access to that medication in that station.
  - b. Gray Type—you do not have access to that medication in that station.

- c. Red Type—the medication is located in a failed drawer or pocket in that station.
4. Select the desired station.
5. Select **Send Patient Order**.  
A confirmation message appears indicating that your patient order has been sent to that station.
6. Your patient order is accessible at the destination station for one hour.



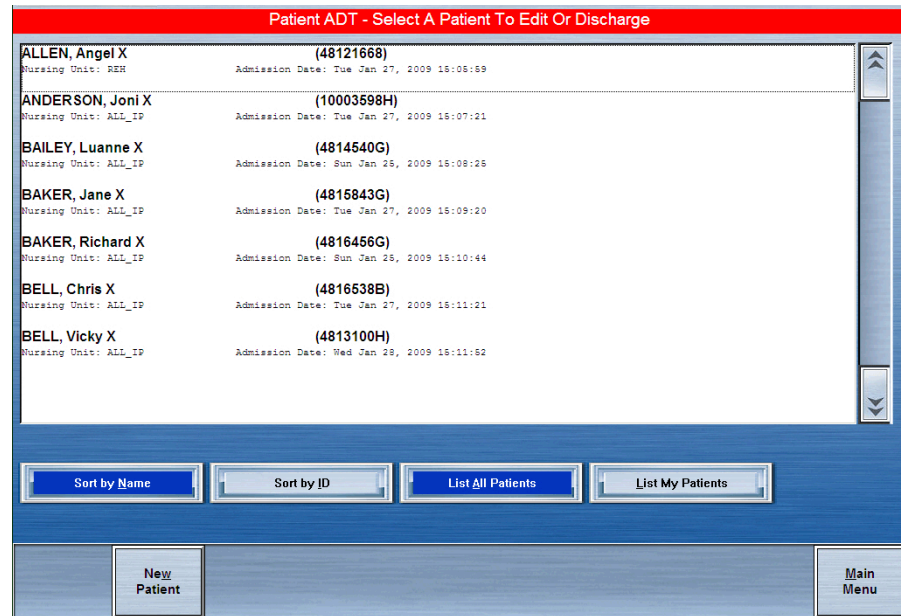
## Using common procedures

Each time that you perform an activity at the station, it is recorded by the system as a transaction. Transaction records include information about the user who performed the transaction, the patient associated with the transaction, and the item and amount that was involved. Transaction information is sent from the station to the console and stored in a database. You can generate reports from this data, which is also used by the system to track inventory levels and to generate refill requests and restock reports to maintain the inventory of medications and supplies.

### Sorting a patient list

When performing certain tasks, such as removing a medication, you can sort the list of patients by their names or by their IDs.

1. In the Main Menu screen, select a transaction (for example, Patients).  
For transactions in which you select a patient, a list of patients appears.



2. To sort the list, do one of the following:
  - To sort the list by patient name, touch **Sort by Name**.
  - To sort the list by patient ID, touch **Sort by ID**.
3. Continue performing the transaction.

## Sorting a medication list

When performing certain tasks, such as refilling a medication, you can sort the list of medications by brand names or generic names.

1. In the Main Menu screen, select the transaction (for example, Load).  
For transactions in which you select a medication, a list of medications appears.
2. To sort the list, do one of the following:
  - To sort the list by medication brand name, touch **Brand Name**.
  - To sort the list by medication generic name, touch **Generic Name**.
3. Continue performing the transaction.

## Using the enhanced medication list

The enhanced medication list allows you to search a medication list containing both brand and generic names. To avoid potential confusion, this feature is limited to areas where you need to search a list instead of a filtered list. An example of this limitation is that Patient Orders can be listed as either brand or generic, but you cannot view it as an enhanced medication list.

In the screen, the **Generic** and **Brand** buttons are removed

## Witnessing a transaction

Some transactions at the station may require a witness. A user with the station Login/Witness Ability privilege enters his or her user ID and password or BioID to certify witnessing the transaction.

Transactions requiring a witness are usually assigned to a security group requiring a witness.

The following table lists the types of station transactions and their witness requirements as set at the console:

Transaction	Witness Requirements
Remove Medications	A witness is required when one or more of the medications selected to remove has a security level requiring a witness. If you have the No Witness Required privilege, no witness is required.
Return to Stock	A witness is required when the medication selected to return has a security level requiring a witness. If you have the No Witness Required privilege, no witness is required.
Return to Bin	A witness is required when at least one of the medications selected to return has a security level requiring a witness. If you have the No Witness Required privilege, no witness is required.
Waste	A witness is required when one or more of the medications selected to waste has a security level requiring a witness. If you have the No Witness Required privilege, no witness is required.

Transaction	Witness Requirements
Load	No witness is required.
Unload	No witness is required.
Refill	No witness is required.
Inventory	A witness is required when at least one medication that you are counting in the carousel drawer has a security level requiring a witness. A witness is required if the medication has a security level requiring a witness. A witness is not required if you have the Independent Inventory Count privilege.
Recover Drawer	A witness is required when one or more of the medications in the drawer being recovered has a security level requiring a witness. A witness is not required if you have the Independent Inventory Count privilege.
Outdate Removal	No witness is required.
Rx Check	No witness is required.
Empty Return Bin	A witness is required when the Empty Return Bin option (located in the Witness Required To section) is enabled from the console for the station. A witness is not required when the No Witness Required privilege is enabled.
Document Discrepancy	A witness is required for each discrepancy requiring documentation. A witness is not required if you have the Independent Discrepancy Resolution privilege.
Override	A witness is required for each medication that has the Override Witness flag on.

### Acting as a witness

As a witness, you acknowledge and verify a transaction. When a transaction requires a witness, a Witness screen automatically appears.

1. If a screen appears that indicates that a witness will be required to verify the transaction, contact the person authorized to act as a witness and touch **Accept** to continue.
2. (Witness) Enter your user ID (Witness ID) and password and press **Enter** on the keyboard.
3. To view the medications that require a witness, touch **List Medications**.
4. To witness the transaction, touch **Accept**.

### Returning a medication with a witness

Based on the privilege level assigned to you and the security level assigned to the medication at the console, the return transaction may require a witness. If a witness is required for the medication that you are returning, the Witness – List Medications screen appears.

1. Touch **Accept**.
2. In the Witness screen, have the witness enter his or her user ID and password and press **Enter** on the keyboard.

### Acknowledging a Clinical Data Category (CDC) question

When you perform Remove, Waste, Return, Admin, Non-Profile Admin, and Comment functions, a question or informational text may appear on the screen. These questions and/or informational text messages are known as clinical data categories (CDCs).

The nursing unit, pharmacy, or other users with appropriate access to the console can set up CDCs. These categories allow information to display and data to be collected from nursing at the station. Each category is defined at the console which, in turn, causes a CDC screen to prompt you to enter clinical data when a formulary item is removed, returned, or wasted at the station.

### Clinical Data Category (CDC) example

CDCs serve various functions. For example, some states require a physician's name to be associated with a transaction involving certain formulary items (for example, narcotic removals or dispensing emergency room (ER) prescription pre-packs). In this instance, a console user assigns the physician name category to all narcotics in the formulary. When a healthcare provider removes a narcotic from the station, a CDC appears asking for the physician's name. Enter or select the physician's name, and the data is stored for reporting and may also be sent through an interface to a charting system.

## Clinical data at your facility

If the MedStation system is interfaced with an electronic charting system, CDCs can also be used to enter charting information. Information entered for the CDCs can be sent directly to the electronic charting system as part of the transaction. For more information about how clinical data is used at your facility, check with your MedStation system manager.

## Data entry methods

Clinical data can be entered in the following ways:

- **Response Pick List**—The system displays a list of responses from which you can select one or more items (depending on the configuration). Each nursing unit can define its own response list that applies to the area (for example, doctor names). An example of data collected this way is Site of Admin.
- **Type-In Text Field**—The system displays a blank text field. Enter your response into the text field. An example of data collected this way is apical pulse.

### NOTE

If multiple categories are defined for a formulary item, multiple CDC screens appear for the item when you remove, waste, or return it. For example, if a formulary item is assigned to four categories, four CDC screens appear to allow data entry for each category.

## To complete a CDC screen

1. Do one of the following:
  - Select the appropriate responses from the list. If you select a response in error, re-select the response and it will return to the unselected list.  
The selected response appears in the Picked Response field to the right of the list.
  - If available, touch **Other Responses** and enter text in the box.  
The Other Responses screen appears with a text box for you to enter a response.
  - If available, touch **Skip Category** to skip the category.  
If one category is defined for the item, the system advances to the next portion of the process. If multiple categories are defined for the item, the next CDC screen appears.
2. Touch **Accept Text**.
3. After entering responses for the category, touch **Accept Response**.

## Verifying the medication count

When removing, returning, or refilling medications, the Verify Medication Count screen may appear, depending on the settings at the console. This option, usually associated with narcotics, requires you to count the medications loaded in the pocket and confirm their inventory levels.

1. Verify that the medication name and count on the Verify Medication Count screen matches the number of medications in the pocket.
2. If the count matches, touch **Yes**.
3. If your count does not match the beginning count, touch **No** and enter the actual quantity in the screen that appears.  
A discrepancy is recorded.
4. Touch **Accept**.

## Blind count

The Blind Count option is configured for the Verify Medication Count screen. The Blind Count option requires you to enter the correct beginning count of a medication before removal, but the system does not display the expected beginning count. You are given two attempts to enter the correct beginning count. If an incorrect quantity is entered on the first try, a second attempt is permitted and a warning banner is displayed that informs you that a discrepancy is about to be created.

If an incorrect quantity is entered on the second attempt, a discrepancy is displayed as the transaction is completed. After all transactions have been completed, a discrepancy slip is printed for the medication, as well as for the removal.

## Checking for expired medication

If you access a pocket that contains an expired medication (whether removing, returning, or refilling), the Outdated Med icon appears. You can then set a new expiration date for the remaining medications.

1. Touch **Outdated Med**.  
The Set Expiration Date screen appears, asking you to set a new expiration date for medications remaining in the drawer.
2. Inspect the medications in the pocket and find the one with the earliest expiration date.
3. In the **Month**, **Day**, and **Year** boxes, enter the expiration date for this medication.
4. Touch **Accept**.
5. Close the drawer.

## Printing a transaction slip

A transaction slip functions as a receipt, showing your name, user ID, and details of your activity at the station. Some facilities prefer to turn off the Transaction Slip function if the slips are not needed. From the console and station, you can configure transaction slips to print for certain types of transactions. All transaction information is communicated electronically to the console and can be printed in a report at any time.

The transaction slip prints a transaction summary when one transaction is performed. If more than one transaction is performed, a transaction detail of all transactions prints.

# Chapter 2

## Patient-Care Functions

This section includes the following topics:

<i>Using the Main Menu screen</i> .....	22
<i>Using Lexi-Comp</i> .....	23
<i>Removing medications</i> .....	26
<i>Returning medication</i> .....	43
<i>Wasting medication</i> .....	46
<i>Patients</i> .....	48

The appropriate use of these functions is determined by your facility's policies and procedures.



## Using the Main Menu screen

Regardless of the type of transaction that is being performed, the same basic steps apply for using the Main Menu screen at the station.

1. Touch the button for the type of transaction that is being performed.
2. Select the patient associated with the transaction.
3. Select the medication or medications for the transaction.
4. Follow the prompts to perform any actions required by optional settings (for example, enter a count or have a witness verify the transaction).
5. Perform the activity (for example, remove the item from the station).
6. Close any open drawers when prompted.
7. Log off before leaving the station.

### **NOTE**

Your user security privileges determine the options available in the Main Menu screen.

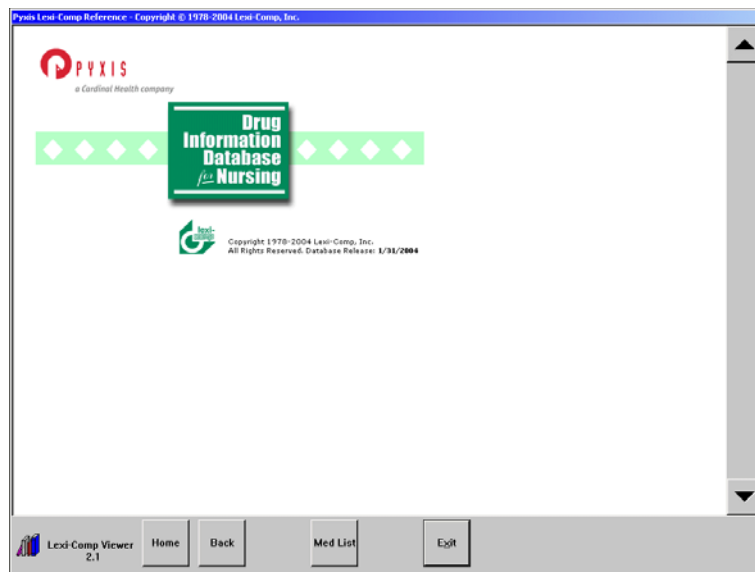
## Using Lexi-Comp

The station is equipped with two Lexi-Comp applications—the Lexi-Comp Information Database and the Lexi-Comp Medication Information tool.

### Searching with Lexi-Comp

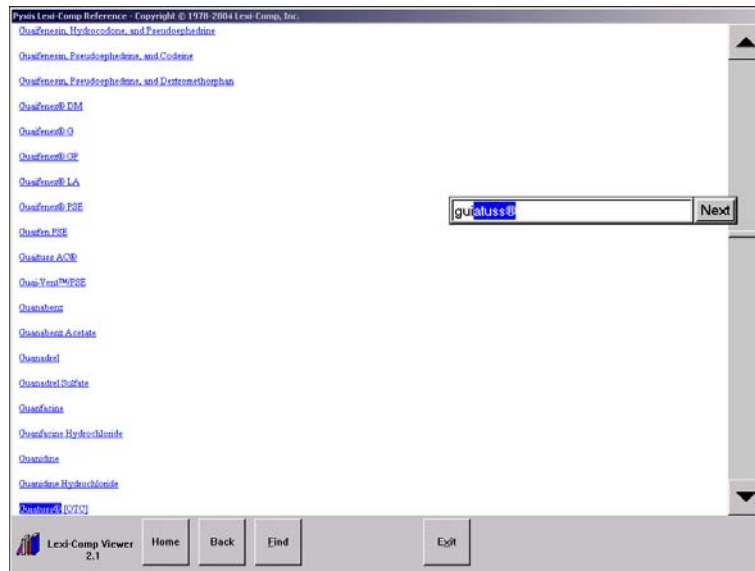
If you cannot locate a particular medication in a medication list, or need to see a brand and generic cross-reference, you can use the Lexi-Comp tool.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. In the toolbar, touch **Lexi-Comp**.
3. In the Lexi-Comp screen, touch **Med List** to view an alphabetical listing of medication names.



4. Enter the first few characters of the medication's trade or generic name. The system locates the medication.

5. Highlight the medication for the brand or generic equivalent and touch **Select**. A cross-referencing screen of the equivalent selected medication appears.



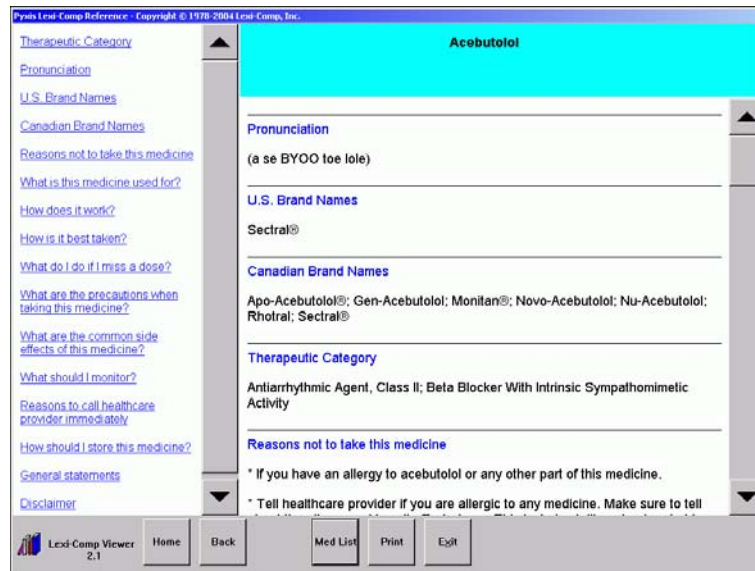
## Printing a medication information leaflet

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. In the toolbar, touch **Lexi-Comp Medication Information**.
3. In the Lexi-Comp screen, touch **Med List** to view an alphabetical listing of medication names.



4. Enter the first few characters of the medication's trade or generic name. The system locates the medication.

5. Highlight the medication for the brand or generic equivalent and touch **Select**. A cross-referencing screen of the equivalent selected medication appears.



6. Touch **Print**.
7. Touch **Exit**.

## Removing medications

After a medication is located, it can be removed. The screens that appear depend on the options turned on at the station or on the medication that has been selected.

### NOTE

If you remove multiple medications at the same time and skip or cancel one of them during the remove process, a warning message appears depending on the type of drawer (secured or unsecured) that the medication is stored in. If the medication you skip is stored in a secured drawer, the warning message (with a yellow background) instructs you to leave the medication in the drawer and then close the drawer. If the medication is stored in an unsecured drawer, no message appears.

## Understanding the remove warning feature

One of the following warnings may appear during a remove operation:

- **Too Early**—Administration is too early compared to the next scheduled dose.
- **Too Close**—Administration is too close to last administered dose.
- **Too Late**—Administration is too far from last scheduled dose.

Remove warnings are used for medications that are not to 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. With remove warning functionality, a dose time list will appear after you pick the medication. This list defaults to the most current dose time, but it also shows other available dose times, past due, or scheduled. If you cancel on this screen, the medication list returns.

## Removing warning screens

If you remove a medication too early or too late, a remove warning screen appears showing the intended scheduled dose time. The options are then to accept or cancel or see more detail. If you remove the medication too close, you see the last remove time instead of the scheduled dose time. If you attempt to reselect a dosing time from the list that already says Removed, the warning bar shows that this is prohibited by displaying removed or administered dose times cannot be selected.

## Accepting a change to scheduled dose time

If you touch Accept for a too early/too late/too close warning, you are overriding the warning. An Override Reason screen appears, providing you with a list of reasons that justify why the medication is being removed despite the warning.

## Removing a profile medication

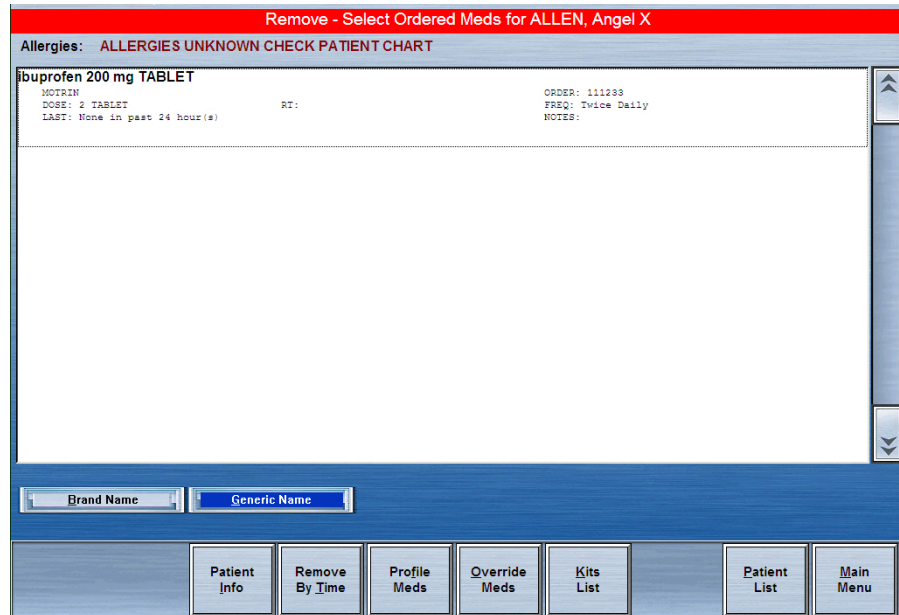
A profile medication is a medication order that has been screened and approved by a pharmacist. When profile medications are displayed on the station, the medication name, ordered dose, quantity, frequency, and route are displayed. This information provides valuable information for checking against the nurse's medication-administration record.

Some orders have a start and stop time defined by the pharmacy computer system. Generally, a medication order becomes accessible at the station when the start time is reached and is no longer accessible after the stop time. However, lead and lag time can be set up for orders at each station.

Lead time defined for the station allows the medication to show up at the station before the start time has been reached.

### To remove a profile medication

1. In the Main Menu screen, touch **Remove**.
2. In the list of patients that appears, select a patient name.
3. In the Remove – Select Ordered Meds screen, select the medications to remove.



4. When the Remove Selections and List Selections buttons appear, touch **Remove Selections**.
5. As each Remove Meds For appears, remove the applicable medication and close the drawer.
6. When you are finished and the Remove Meds screen appears, touch **Main Menu**.

## Removing a medication by dosing time

If your system includes the profile mode and the list of patient orders appears, you have the option of removing medications by dosing time. Removing medications by dosing time allows you to remove medications that are scheduled to be administered during a time range.

### NOTE

The Remove by Time button appears on stations in profile mode.

### To remove a medication

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select the patient name.
3. In the Remove – Select Ordered Meds screen, touch **Remove By Time**.
4. In the Remove – Enter Due Time Range for Ordered Meds screen, enter the time range.

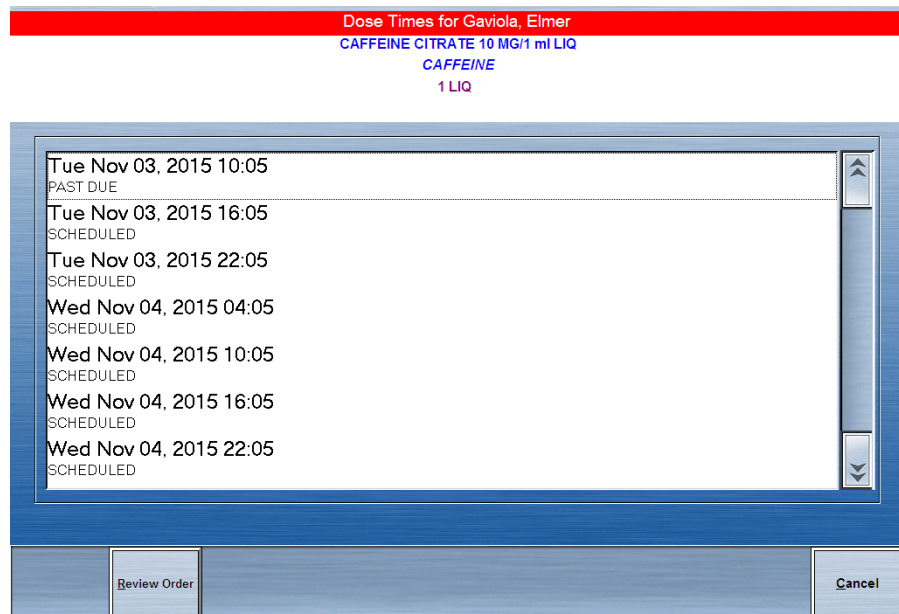
The Start Time and Stop Time for the Dose Time range initially defaults to the nearest hour (start) plus 59 minutes (stop).

5. Touch **Accept Times**.

### NOTE

The list of medications does not include those with a scheduled time.

A list of medications to be administered during the selected time range for the selected patient appears.



## Removing an equivalent dose

Equivalencies are defined by the pharmacy and work in conjunction with order entry into the pharmacy computer system.

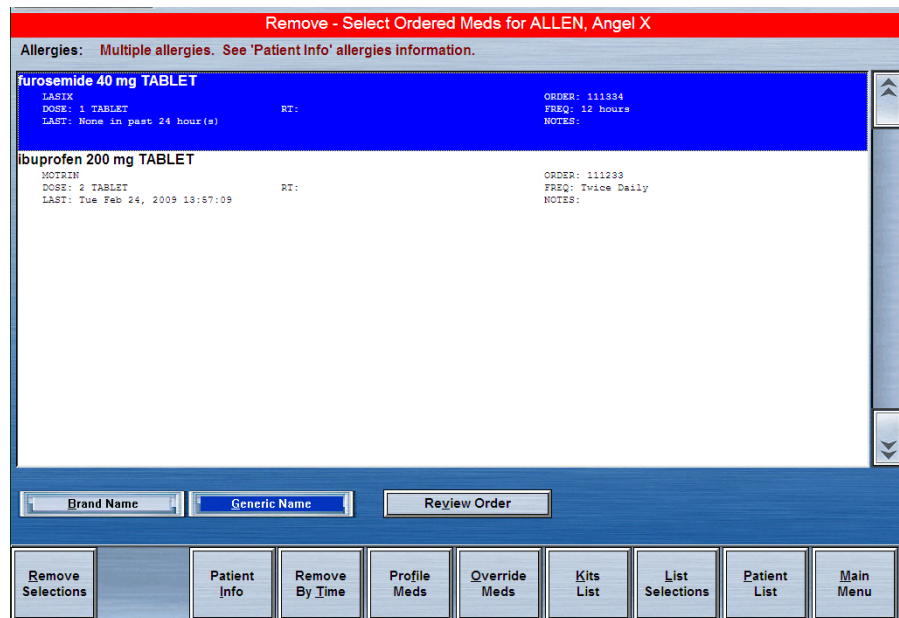
Formulary equivalencies allow pharmacists to define a certain strength of a formulary item as equivalent to multiples of another strength of the same formulary item. If the ordered medication is not loaded or not available at the station but an order allowed equivalency is available, you can remove an equivalent dose.



The remove quantity for the equivalent dose is automatically determined based on the ordered dose. The Equivalent Med icon appears, indicating that an equivalency is in effect.

### To remove a dose

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select the patient name.
3. In the Remove – Select Ordered Meds screen, select the medication to remove and touch **Remove Selections**.



The drawer opens and the Remove Meds screen appears with the Equivalent icon.

4. Enter the amount to remove, remove the medication, and close the drawer.
5. In the Remove – Select Ordered Meds screen, touch **Main Menu**.



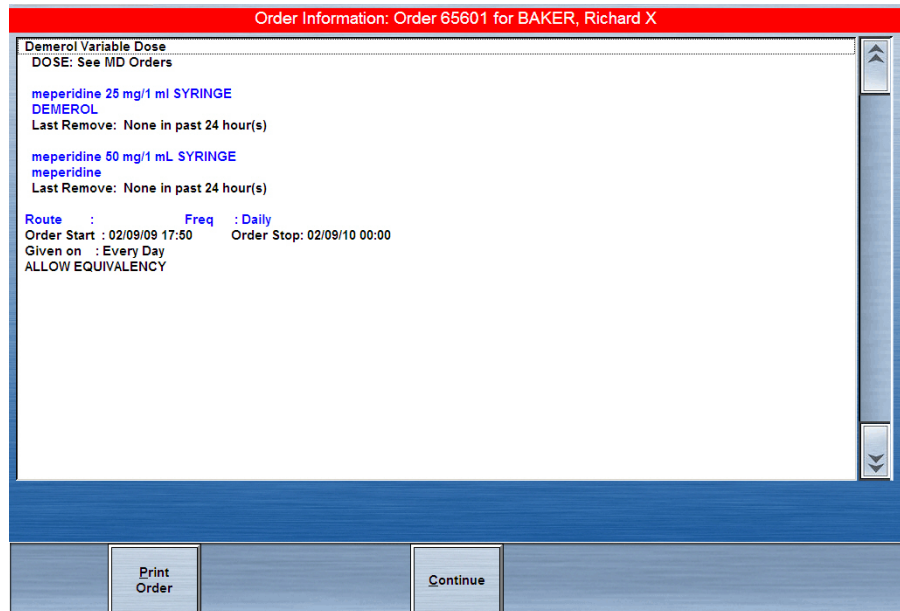
## Removing a variable dose

A variable dose order allows the nurse to choose the proper strength of the ordered item from a dose range stocked at the station.

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Med – Select a Patient screen, select a patient name.
3. In the Remove – Select Ordered Meds screen, select the medication with the variable doses to remove.
4. In the Remove – Select Variable Dose Meds screen, touch **Review Order**.



5. In the Order Information screen, review details of the order selected and then touch **Continue** to return to the previous screen.



6. Select the applicable medication.
7. In the Remove – Select Variable Dose Meds screen, enter the quantity to remove.
8. Touch **Verify Calc** to verify the correct quantity.
9. In the Volume Calculation – Remove Meds screen, touch **Continue** to return to the previous screen.
10. Touch **Accept**.
11. In the Remove – Select Variable Dose Meds screen, select another medication or touch **Accept** to continue the remove process.
12. If you pressed **Accept**, touch **Remove Selections** in the Remove – Select Ordered Meds screen.

The drawer opens and the Remove Meds screen appears.
13. Enter the amount to remove, remove the medication, and close the drawer.

**NOTE**

If the variable doses chosen exceed the specified strength in the order (for example, 15 milligrams [mg]), a message appears notifying you that the maximum strength has been exceeded.

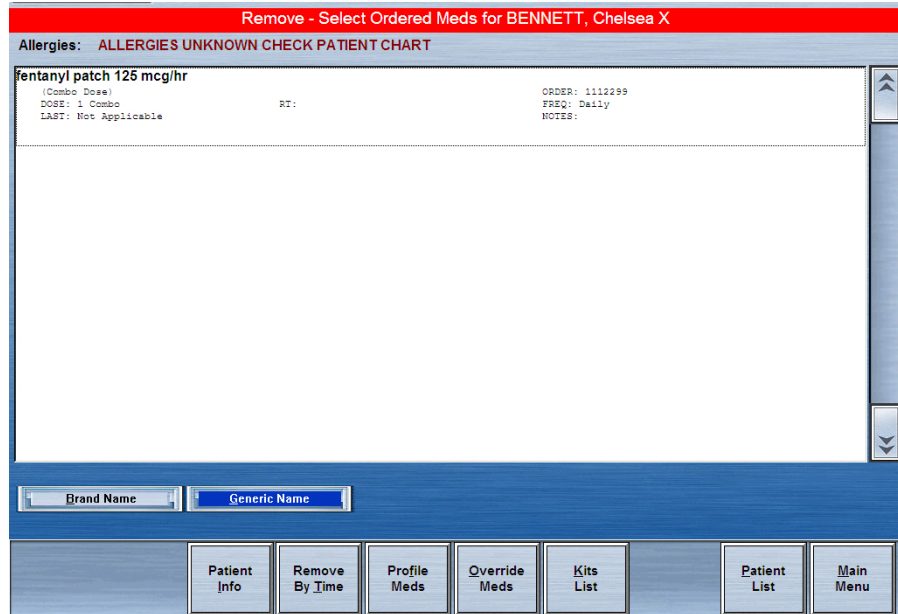
14. In the Remove – Select Ordered Meds screen, touch **Main Menu**.

**Removing a combination dose**

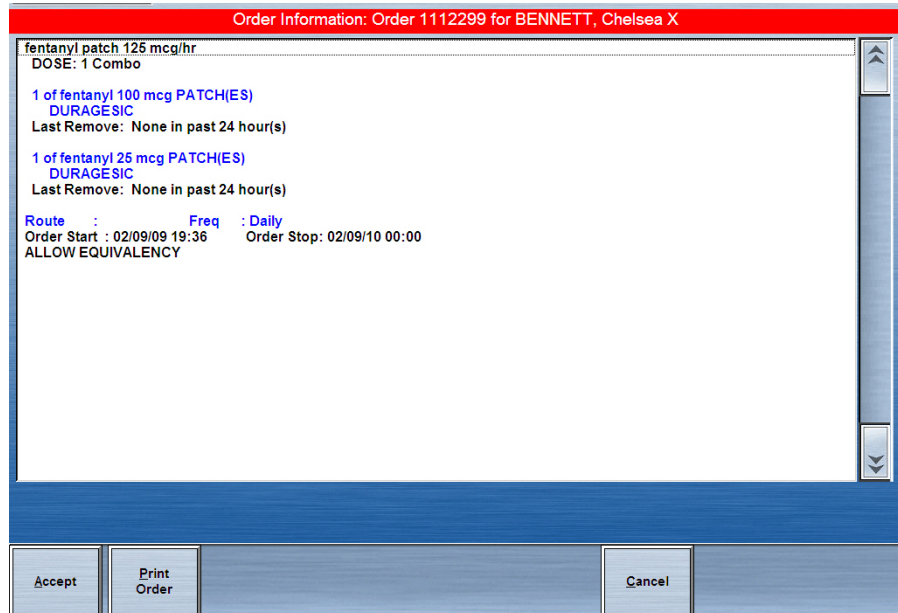
Combination doses consist of two or more items defined as equal to an ordered item. All items in a combination dose must be present at the station to remove the dose.

1. In the Main Menu screen, touch **Remove**.

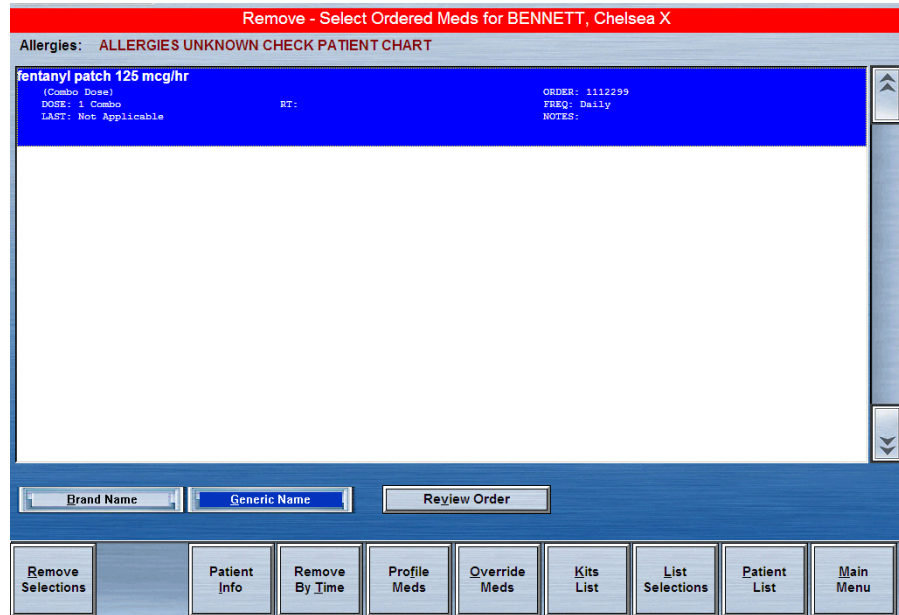
- In the Remove Med – Select a Patient screen, select a patient name.  
The Remove – Select Ordered Meds screen appears indicating combination doses available.



- Select the medication or combination dose to remove.
- In the Order Information screen, touch **Accept**.



- In the Remove – Select Ordered Meds screen, touch **Remove Selections**.



You are prompted to remove each medication in the combination dosage.

## Overriding a patient profile

The Override Meds function can be used to administer a medication stocked in your station without a current order.

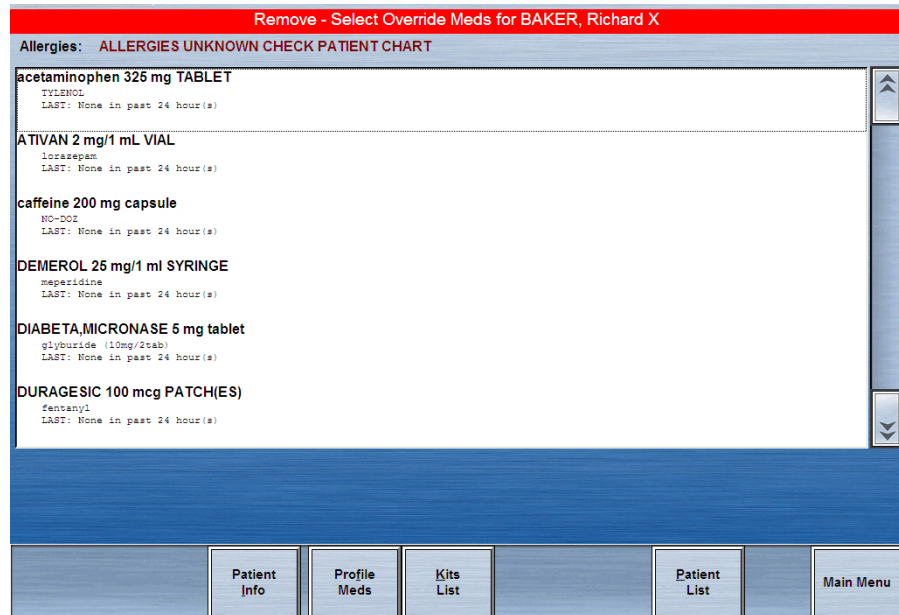
Facility policy may require a witness to override a patient’s profile. When a patient’s profile is overridden, the transaction slip and various reports indicate that the medication was removed using the Override feature.

### NOTE

You must have Override privileges to administer medications that are not part of the patient’s profile.

### To override a profile

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select a patient name.
3. In the Remove – Select Ordered Meds screen, touch **Override Meds**.
4. In the Remove – Select Override Meds screen, select the medications to remove.



5. Touch **Remove Selections**.
6. In the Remove Meds screen, enter the Remove Quantity, follow any prompts, and touch **Remove Now**.

## Using scan on remove and/or refill and load

This feature allows a facility to require scanning a medication barcode during the remove and/or refill and load processes.

### Scanning on remove

You must scan each individual item of the total quantity of medication being removed. Scanned information is matched against the barcode database and alerts you that:

- an item is a correct match.
- an item is an incorrect match.
- the scanner cannot find that particular barcode in the database.
- an item cannot be scanned.

An incorrect match requires you to return that medication to the return bin. Inability to Find (that particular barcode) and Unable to Scan gives you the option to verify that the medication is correct and to continue the remove process or define that the medication is incorrect and to continue to the return-to-bin process.

### Using scan on remove

1. Select **Remove** from the main menu.
2. Select the appropriate patient name.
3. Locate and select the medication to remove. Select **Remove Selections**.  
The Remove - Meds screen indicates Remove and Scan Each of the remove quantity.
4. Scan one medication package's scancode.  
If the scanned medication is a correct match, the quantity decreases by one.

Remove Meds for Gaviola, Elmer  
 CAFFEINE CITRATE  
 CAFFEINE  
 10 MG/1 ml LIQ

LAST: None in past 1 hour(s)    Due Time: Tue 10:05

Remove and Scan Each of:  
 1 LIQ  
 Drawer 1, Pocket 2  
 Dose: 1 LIQ

7 8 9  
 4 5 6  
 1 2 3  
 0 . Del

Review Order    Unable to Scan    Cancel Med

5. One of the following results may occur:
  - If a medication is an incorrect match for what is intended for removal, an error message appears. It details the incorrect match and directs you to return the medication to the return bin.
  - If scanned medication cannot be found in the database, an error message directs you to verify that the medication is correct or choose to return the medication to the bin.
  - If the barcode cannot be read by the scanner, you can choose **Unable to Scan**.

An error message appears. You are prompted to verify that the medication is correct or choose to return the medication to the bin.

### Using Remove and Scan Once

If **Scan Once on Remove** was configured on the console, this allows you to scan medications once regardless of the quantity being removed.

- When removing multiple instances of a formulary item, the station requires one scan in the first instance of the item 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 instance removed from each pocket from which the item is removed.

#### 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.

### Scanning on refill and load

You are required to scan one item of the total quantity of medication being refilled or loaded. The scanned information is then matched against the station inventory and if a match is found, the appropriate drawer/pocket will open. If you get a dialog box with **No Match**, **Incorrect Med Scanned**, or **Unable to Scan**, you will not be allowed access nor given the option to verify and gain access.

### Scanning on load

1. Select **Load** from the main menu.
2. Scan one medication package's scancode.

One of the following results may occur:

- If this is the correct medication, the appropriate drawer or pocket opens. If the medication is in a Matrix drawer or Mini-Drawer in Matrix Mode, you are directed to scan the correct pocket.
- If this is an incorrect medication—the scancode matches a medication other than a medication pending or loaded within your device—a “no

longer pending or loaded at this MedStation” message appears. You are unable to load this medication.

- If the scancode is not in the database—the scancode is not in the scancode maintenance database—“A Med ID was not found for Scan Code” message appears. You are unable to load this medication.
3. If you use Assign and Load and you attempt to load medications requiring Scan to Load, the medication is grayed out. An “Items require scan may not be selected!” message appears.

### **Scanning on refill**

1. From the Main Menu, select **Refill**.
2. Scan one medication package’s scancode.
3. One of the following may occur:
  - If this is the correct medication, If the scancode that is scanned matches for a medication pending or loaded within the device the appropriate drawer / pocket opens. When utilizing a Matrix drawer or Mini-Drawer in Matrix Mode the user will be directed to Scan the Correct Pocket. Upon scan of the Correct Pocket the standard Load workflow will continue.
  - If this is an incorrect medication—the scancode matches a medication other than a medication pending or loaded within your device—a “no longer pending or loaded at this MedStation” message appears. You are unable to load this medication.
  - If the scancode is not in the database—the scancode is not in the scancode maintenance database—a “A Med ID was not found for Scan Code” message appears. You are unable to load this medication.
4. If you use Refill - Select by and you attempt to refill medications requiring Scan to Refill, a Scan is Required message appears. An “Items require scan may not be selected!” message appears.

### **Removing a kit**

Kits provide an easy way to select a predefined group of medications, rather than individually selecting each medication. If you have access security privileges for the medications in the kit and if the medications are loaded at the station, medications can be removed within a kit. Kits are created at the console and at the station through the Kits feature.

#### **NOTE**

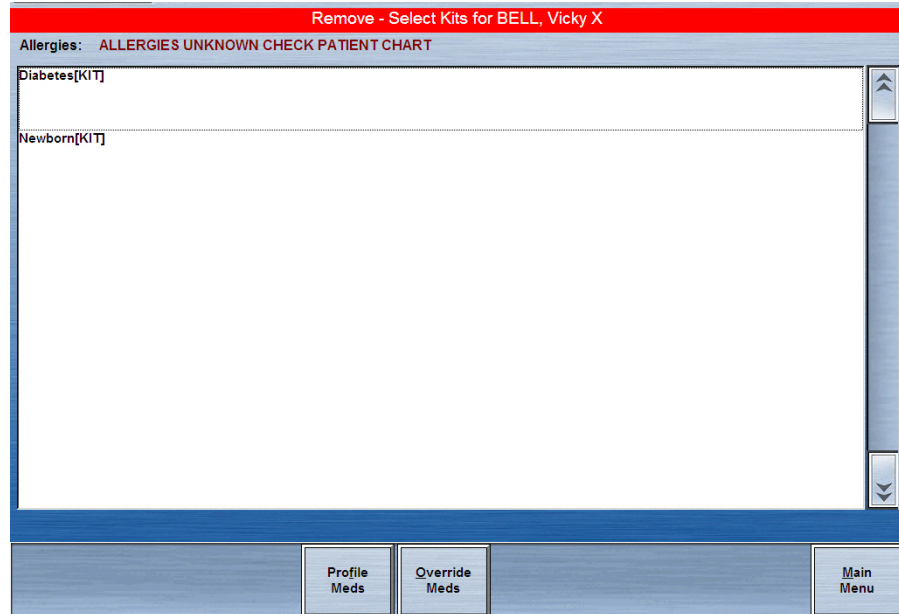
In profile mode, kits are not an ordered item. If a kit contains an item that is not ordered and cannot be overridden, you cannot remove the kit.

#### **To remove a kit**

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select a patient name.
3. In the Remove – Select Ordered Meds screen, touch **Kits List**.



4. In the Remove – Select Kits screen, select the desired kit.  
Touch **Kit Info** to see the contents of a kit. Touch **Continue** to return to the previous screen.



5. To remove the selected kit, touch **Remove Selections**.  
A screen appears prompting you to remove each medication in the kit.
6. After you have removed all medications for the kit, touch **Accept**.

## Selecting the quantity to remove

If you selected an order with a predetermined quantity (the quantity was specified by an order from the pharmacy), the system automatically displays the quantity in the Quantity box and moves to the next step, which allows you to continue to remove medications. If the order does not specify a quantity, you must enter the amount in the Quantity box and select Remove Now or Select Next Item to continue.

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select a patient name.
3. In the Remove – Select Ordered Meds screen, select the medication to remove and touch **Remove Selections**.
4. In the Remove Meds screen, enter the quantity to remove (unless the ordered quantity is specified).

### NOTE

If a medication is defined at the console to allow the removal of fractional units, a decimal amount can be entered as the removal quantity. For example, you can enter 0.25 milliliters (ml), instead of 1 ml.

5. If you want to review the order, touch **Review Order**.

6. Remove the medication and close the drawer.  
The Remove Meds screen reappears.
7. To remove more than one type of medication for this patient, select another medication and repeat the process.

**NOTE**

You cannot return fractional units to their pockets.

## Wasting while removing

In some cases, a medication is wasted at the time of removal (for example, the medication was dropped or a vial cannot be returned).

If the Waste While Removing option has been enabled at the console for a station and applies to the medication that you are removing from the station, a message asks whether you plan to administer a full dose.

To waste a medication separately from the Remove process, see *Wasting medication* on page 46.

### To waste a medication

1. In the Remove Meds for [Patient] screen, touch **No** if you do not plan to administer the full dose.
2. In the **Amount to be Given** box on the Waste While Remove screen, enter the amount that you plan to administer to the patient.  
The amount to be wasted is automatically calculated, based on the amount to be administered.
3. Respond to any additional prompts that appear, such as a request to verify the medication count.  
The Remove Meds screen appears,
4. Remove the medication, and touch **Accept**.

## Witnessing a waste during the remove process

If the Waste While Removing option has been enabled at the console for a station and applies to the medication that you are removing from the station, a message asks whether you plan to administer a full dose.

1. In the Remove Meds for Patient screen, do one of the following:
  - If you plan to administer the full dose, touch **Yes**. Remove the medication according to *Removing medications* on page 26.
  - If you do not plan to administer the full dose, touch **No**.
2. Touch **Accept**.

A Witness screen appears for a witness to enter his or her user ID and password. For more information, see *Acting as a witness* on page 17.

3. Ask a witness to enter the user ID and password to allow you to waste part or all of the medication.
4. In the **Amount to be Given** box, enter the amount that you plan to administer to the patient.  
The amount to be wasted is automatically calculated based on the amount to be administered.
5. Touch **Accept**.

### Using the list selections and review order features

To view a list of items selected for removal, touch List Selections. To view or print details on orders selected for removal, touch Review Order.

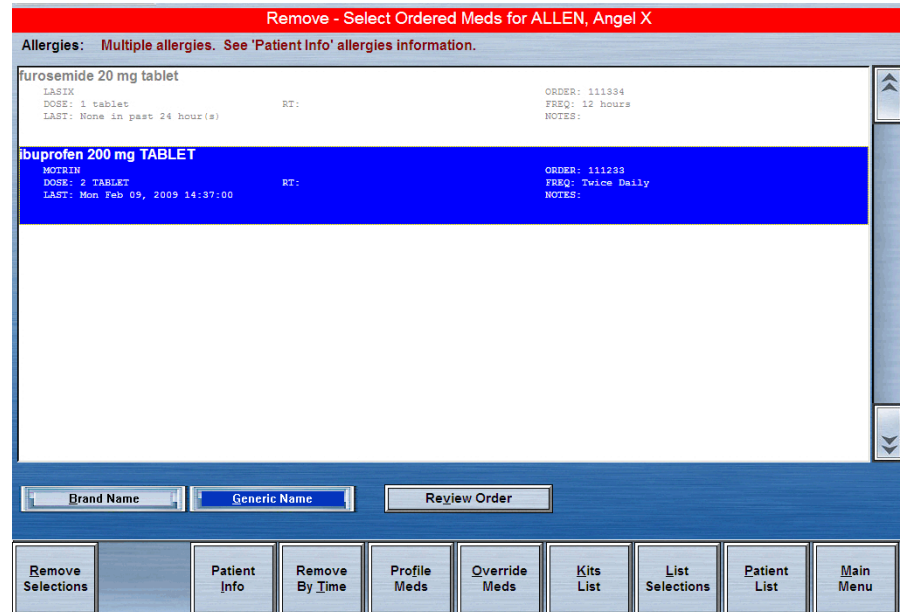
The Review Order and List Selections buttons appear on the Remove Meds screen after you have chosen items to remove.

### Listing selections

This topic describes how to list selections.

1. In the Main Menu screen, touch **Remove**.
2. In the Remove Meds – Select a Patient screen, select a patient name.
3. In the Remove – Select Ordered Meds screen, select one or more items to remove and then touch List Selections to view a list of items selected for removal.
4. In the next Remove – Select Ordered Meds screen, review the information.
5. Touch **Continue** or **Remove** to continue with the Remove process.

- In the Remove – Select Ordered Meds screen, touch **List Selections** to view a list of items selected for removal.



- Touch **Continue** or **Remove** to continue with the Remove process.

### Reviewing and printing order details

The following procedure explains how to review and print order details.

- In the Main Menu screen, touch **Remove**.
- In the Remove – Select Ordered Meds screen, select a patient name.
- In the Remove – Select Ordered Meds screen, select an order and touch **Review Order** to review information about the order.
- In the Order Information screen, touch **Print Order** to print the information or **Continue** to continue with the Remove process.

### Concluding the remove process

The final screen in the Remove process displays the name of the patient, the specified remove quantity, the medication name, the drawer and pocket, and the date and time last removed.

- Verify that the patient name and medication are correct.
- If the number of medications you are removing is different from the amount indicated on the screen, touch the **up** or **down arrows** to correct the number.
- Remove the medication from the pocket and close the drawer.

#### NOTE

If the station is set up to print slips for removing medications, a transaction slip is printed. If not, touch Print Slips to print a transaction slip.

During the remove process, you may be notified to check the medication or that the medication is unable to be removed.

### **Checking medication**

When enabled at the console, the Rx Check feature causes the Check Med button to appear.

If the Check Med button appears while removing a medication, the pocket has recently been loaded or refilled and medications have not yet been checked by a pharmacist.

If the Verify Count setting is enabled at the console, a screen appears asking you to verify that the quantity of the medication is correct.

### **Unable to remove a medication**

When the Unable to Remove Medication warning appears at the Profile screen, ordered medications that appear shaded are not available for removal due to one of the following:

- The order is on hold.
- The order is expired or past the stop time.
- The medication is out of stock.
- Your security level does not permit access to a medication in the order.
- The start time has not been reached.
- The medications are not loaded at the station.
- The ordered medications are in a failed drawer.
- The order has been discontinued.
- The order is a one-time medication and has been removed.

---

## Returning medication

If the wrong item from the station has been removed or the doctor cancels the order, use the Return function to return items to the system and credit the patient's account.

A returned medication must be intact and in its original, tamper-evident packaging.

### Returning to stock

If the Return to Stock feature at the station is configured and the item has the Return to Stock formulary option assigned to it, an item can be returned to its original pocket. The Return to Stock option can be:

- Enabled or disabled for a particular medication.
- Enabled or disabled for a station.
  - If Return to Stock is enabled for the station and for the formulary, you can return the medications.
  - If Return to Stock is disabled for the station and for the formulary, you cannot return any medications to stock. You must return them to a designated internal or external Return Bin.

### Returning medication to a return bin

The location of the return bin is determined during implementation and depends on how your station is configured. One drawer or shelf per station is usually designated as the Return Bin. The location and how often you empty the Return Bin depends on the procedures for your facility or pharmacy.

#### NOTE

Refrigerated medications should be returned to stock (in the refrigerator) rather than to a Return Bin. (Check the policies for your facility. Each facility usually has its own procedures and policies.)

#### To return a medication

1. In the Main Menu screen, touch **Return**.
2. In the Return Meds – Select a Patient screen, select the patient for which the medication is being returned.
3. Select the medication.
4. If the medication that you are returning does not appear on the Return – Select Meds to Return screen, touch **All Meds**.
5. Select the medication that you are returning to the station.
6. In the Return – Select Meds to Return screen, enter the number of medications that you are returning.

**NOTE**

If Removed Medications was selected on previous screens, the number that appears in the quantity field defaults to the quantity of the medication removed.

If you selected All Meds on the previous screen, the quantity field defaults to one. Indicate the actual amount of the medication that you are returning.

You can enter an amount less than the amount removed. The default quantity takes into account any previously recorded return of this medication.

7. Touch **Return Now**.
8. Respond to any additional prompts that appear, such as a request to verify the medication count.
9. For multiple returns, touch **Select Next Med** and repeat these steps.

## Handling a return that requires a witness

The Witness screen appears in the following situations:

- The medication that you selected was defined at the console with a security level that requires a witness.
- Your station requires a witness for returning to stock or to bin.
- You do not have the No Witness required station privilege.

### To handle a witness-required return

1. If the medication that you are returning requires a witness, review the list of medications that appears.

This screen displays the medications that require a witness for the return; it does not show all selected medications for returns.

2. Touch **Accept**.
3. (Witness) Enter your user ID (Witness ID) and password and press Enter on the keyboard.

After the witness enters a user ID and password, the next screen in the Return process appears.

## Concluding the return process

The final screen in the Return process shows the medication name, the drawer and pocket for returning the medication (Return Bin or the original pocket), and the number of medications that you are returning.

If the screen instructions prompt you to return the medication to a particular drawer and pocket, the station opens that drawer. Return the medication to the appropriate drawer and pocket, and close the drawer.

If the screen prompts you to return the medication to the Return Bin, the Return Bin drawer opens. If using an external return bin, no drawers open. Place the medication inside the return bin, touch Accept, and close the drawer.

If you do not close the drawer, the station beeps. If the station is set up to print slips for returning medications, a transaction slip prints.

### **CAUTION**

When returning a medication to the Return Bin, make certain that you turn the one-way slot until the medication drops into the bin.



## Wasting medication

The Waste function documents waste, much like narcotic sign-out sheets. The Waste function:

- Allows you to create an audit record for wasting all or part of a previously removed medication for a specific patient.
- Allows you to credit the patient's account to ensure that the patient is not charged for medication not received.
- Is used if you were unsure of how much you were going to waste at the time that you originally removed the medication. After the medication is given to the patient, use the Waste function to waste the medication and to document the amount not given.
- Is primarily used for controlled substances, but can also be used for other medications.

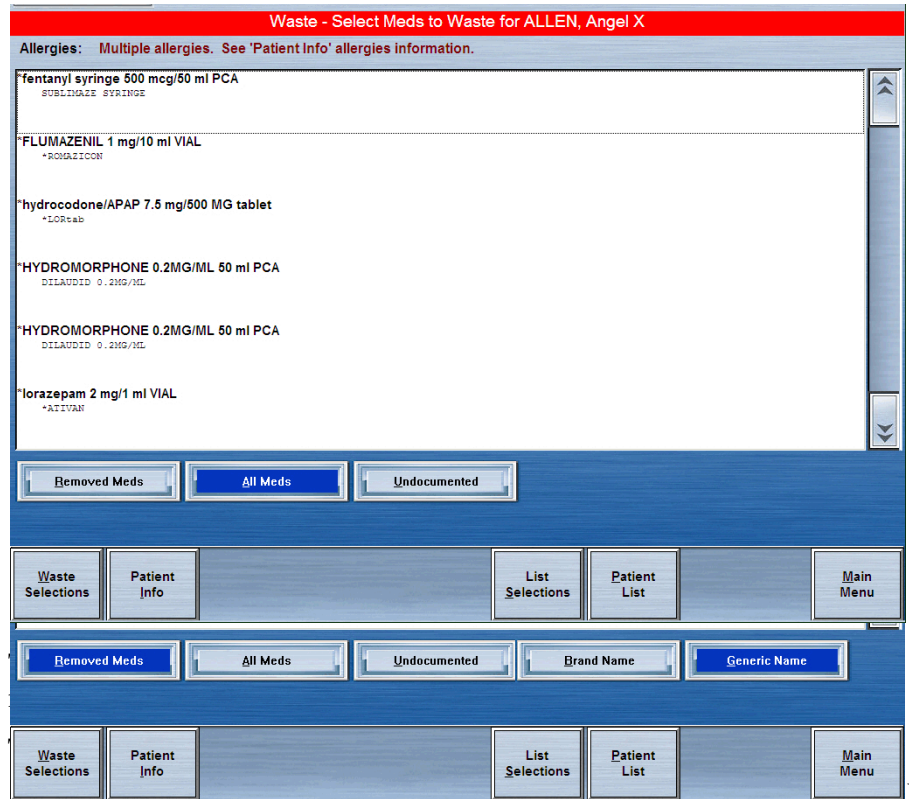
### To waste a medication

1. In the Main Menu screen, touch **Waste**.
2. In the Waste Meds – Select a Patient screen, select the appropriate patient.
3. In the Waste – Select Meds to Waste screen, touch **Patient Info** to view information about the selected patient.
4. In the Waste – Review Patient Info screen, touch **Continue** to return to the Waste – Select Meds to Waste screen.
5. Select the appropriate medications.
6. Touch **Waste Selections**.
7. In the Waste for [patient name] screen, enter the **Amount Given**.
8. If you have the Credit Patient user privilege and the full dose is being wasted (you cannot credit a partial dose), touch **Credit Patient** to select it.  
If a dose is wasted because it was dropped or accidentally damaged, check your facility's policies and procedures regarding crediting a patient.
9. In the Waste for screen, enter the amount given and touch **Accept**.
10. Respond to any CDC screens as they appear. For more information, see *Acknowledging a Clinical Data Category (CDC) question* on page 17.  
The transaction is recorded and the Witness screen appears.

### To use the Undocumented Waste feature

This feature allows your facility to track any and all remove transactions in which you remove a quantity greater than the ordered dose. The feature is first configured at the console. In addition to this tracking and to ensure that the clinician can appropriately document waste transactions against the tracked remove transaction, the Waste workflow will include a means of presenting the clinician with only those remove transactions which have resulted in an Undocumented Waste being created. A warning banner, displayed upon log in and detailing that the user has Undocumented Wastes, is configured at the device.

1. An undocumented waste message appears if such a transaction exists at the station. Click **YES** to waste the medication.
2. Select the patient for which the Undocumented Waste is outstanding.  
A list of all remove transactions for that patient appears.
3. In the Waste - Select Meds to Waste screen, select **Undocumented**.



4. Enter the amount given in the Waste screen.
5. Select **Accept**.

### Crediting a patient

If a dose is wasted because it was dropped or accidentally damaged, check your facility’s policies and procedures regarding crediting a patient. If you determine that the patient should not be charged for the waste, touch Credit Patient to credit the patient’s account.

**NOTE**

If you have the Credit Patient user privilege, the Credit Patient option button appears. You cannot credit a partial dose.

## Patients

If you have the appropriate privileges, you can add a permanent patient, edit information for an existing patient, or discharge a patient through the Patients menu.

Depending on your user privileges, you can also add temporary patients during the Remove, Return, and Waste processes. However, you cannot add specific admission data for temporary patients.

### Searching for a patient

The following procedure explains how to search for a patient.

1. In the Main Menu screen, touch **Patients**.  
The Patient ADT – Select a Patient to Edit or Discharge screen appears.
2. To search for the patient's name, do one of the following:
  - Scroll one patient at a time using the arrows on the computer keyboard.
  - Scroll a page at a time using the arrows in the scroll bar on the screen or the Page Up and Page Down keys on the keyboard.
  - Type the first few letters of the patient's last name.A search box appears with the letters that you entered. The first patient name in the list that is the closest match is displayed on the screen.
3. If the patient that you want is not listed, add the patient with the **Add Patient** button.  
After you select a patient, basic admissions, discharge, and transfer (ADT) information appears.

### Adding a patient

Patient information is usually entered into the system through the interface with the facility's ADT system or manually entered at the console. You can add a temporary patient at the station during the Remove, Return, Waste, and Chart procedure for a patient who has not been entered into the system. However, a more detailed process is also available for adding specific admission data.

Patients are added in the following ways, depending on your user privileges:

- At the Patient screen.
- During the remove, return, or waste processes.

### Adding a temporary patient

The following procedure explains how to add a temporary patient to the station.

1. From the Remove Meds, Return Meds, or Waste Meds screens, touch **Add Patient**.
2. In the Add a Patient screen, enter the patient's last name and first name (these are mandatory fields).

**NOTE**

Although you can enter up to 30 characters in each field, the system limits the combined total to 30 characters. The result stored in the database may include a truncated version of the first name.

3. If known, enter the following:
  - a. If you know the patient's ID, enter it in your facility's format and touch **Enter**. If you do not know the patient's ID, touch **Enter** to skip this field.  
Always enter the exact patient ID if it is known. If your station is running in profile mode, entering the exact ID displays the current profile for the patient if the patient order information is in the system. For example, entering the patient ID following a patient transfer ensures that profile information appears even if the ADT has not yet been received. If not, the nurse must use the override feature because the patient cannot be matched with a patient ID on the console.

**CAUTION**

It is important to enter the correct ID for the patient whenever possible so that the temporary patient can be accurately matched with the permanent patient.

- b. Enter the Room number and touch **Enter**.
  - c. Enter the Bed number and touch **Enter**.
4. To add the new patient to your My Patient list, select the **Add to My Patient** check box.
5. Touch **Accept**.
6. Continue with the Remove, Return, or Waste transaction.

**Adding a permanent patient**

The following procedure explains how to add a permanent patient to the station.

1. At the Main Menu screen, touch **Patients**.
2. In the Patient ADT – Select a Patient to Edit or Discharge screen, touch **New Patient**.

**NOTE**

Last Name, First Name, and ID are required fields. To determine whether any additional fields are mandatory, refer to your facility's policies and procedures.

3. On the General tab of the Add Patient screen, enter the following:
  - **Last Name**—Enter the patient's last name (up to 30 characters).
  - **First Name**—Enter the patient's first name (up to 30 characters).

**NOTE**

Although you can enter up to 30 characters in each field, the system limits the combined total to 30 characters. The result stored in the database may include a truncated version of the first name.

- **ID**—Enter the patient’s ID, following the suggested ID format used by your facility.
  - **Alt. ID 1**—Enter an alternate ID for the patient.
  - **Alt. ID 2**—Enter a second alternate ID for the patient.
  - **Date of Birth**—Enter the patient’s date of birth in the mm/dd/yyyy format.
  - **Height**—Enter the patient’s height. Enter a value, and then select the unit of measure from the list to the right of the Height field.
  - **Weight**—Enter the patient’s height. Enter a value, and then select the unit of measure from the list to the right of the Weight field.
  - **Estimate**—If either the height or weight is not exact, select this box.
  - **Sex**—Select the patient’s gender.
4. Touch the **ADT** tab.
  5. Enter the following:
    - **Room**—Enter the room number of the patient.
    - **Bed**—Enter the bed where the patient is located.
    - **Admission Date**—Enter the date the patient was admitted.
    - **Discharge Date**—If required by your facility, enter the date and time when the patient is discharged. Generally completed based on options set by the Pyxis<sup>®</sup> Procar or Areas table.
    - **Nursing Unit**—Enter the nursing unit where the patient is located by selecting a choice from the drop-down list.
    - **Visit Unit**—Enter the unit where the patient is visiting by selecting a choice from the drop-down list. Generally completed based on options set by the Pyxis Procar or Areas table.
    - **Visit Discharge**—Enter the date and time that the patient is expected to be discharged from the Visit Unit. Generally completed based on options set by the Pyxis Procar or Areas table.
  6. Touch the **Clinical** tab.
  7. Enter the following:
    - **Diagnosis**—Enter this patient’s diagnosis.
    - **Patient Comments**—Enter any relevant comments about this patient. For example, no visitors or hearing-impaired.
    - **Admitting Dr.**—Enter the name of the doctor who admitted the patient to the facility.
    - **Attending Dr.**—Enter the name of the doctor who is attending the patient.
  8. Touch the **Allergies** tab and enter the patient’s allergies.

This shows information that was transferred from your facility’s allergy data system. The Allergies field is not a required field, but can be used to help reduce chances of providing a medication that may cause an allergic reaction.

**NOTE**

If Enhanced Allergies has been turned on at the console, the Allergy information shows Type, Code, Severity, Reaction, and Description.

9. Touch **Save** to save the new patient information.

**Editing patient information**

Information such as patient ID, date of birth, height, weight, and gender for an existing patient can be edited with the Patients function.

**To edit patient information**

1. In the Main Menu screen, touch **Patients**.
2. In the Patient ADT – Select a Patient to Edit or Discharge screen, select a patient name and touch **Edit Patient**.
3. In the Edit Patient screen, update the appropriate fields on the General, ADT, Clinical, and Allergies tabs.
4. Touch **Save**.

**Viewing patient information**

The following procedure explains how to view patient information.

1. In the Main Menu screen, touch **Patients**.
2. In the Patient ADT – Select a Patient to Edit or Discharge screen, select a patient name.  
The Edit Patient and Discharge Patient buttons appear.
3. To view general information about the patient, touch **Edit Patient**.  
The Edit Patient screen opens to the General tab which is the default tab.
4. To view ADT information, touch the **ADT** tab.
5. To view the Clinical information, touch the **Clinical** tab.
6. To view the Allergies information, touch the **Allergies** tab.
7. When you are finished, touch **Cancel**.

## Discharging a patient

Discharging a patient from the station does not discharge the patient from the facility ADT system.

1. In the Main Menu screen, touch **Patients**.
2. In the Patient ADT – Select a Patient to Edit or Discharge screen, select the patient to be discharged and touch **Discharge Patient**.

A warning message appears, requesting that you confirm the discharge.

3. When the confirmation message appears, touch **YES**.

All information for the selected patient is deleted from the station.

## Using the patient summary

Use the Patient Summary to view your patients' order and medication information including statim (STAT) and pro re nata (PRN) orders and dosing times. If the station is configured with access to a network printer, you can also print the information in the form of a worksheet that can be taken with you. If the medication ordered for the patient is not loaded at the applicable station, the Station column on the worksheet indicates which station in the same area contains the medication.

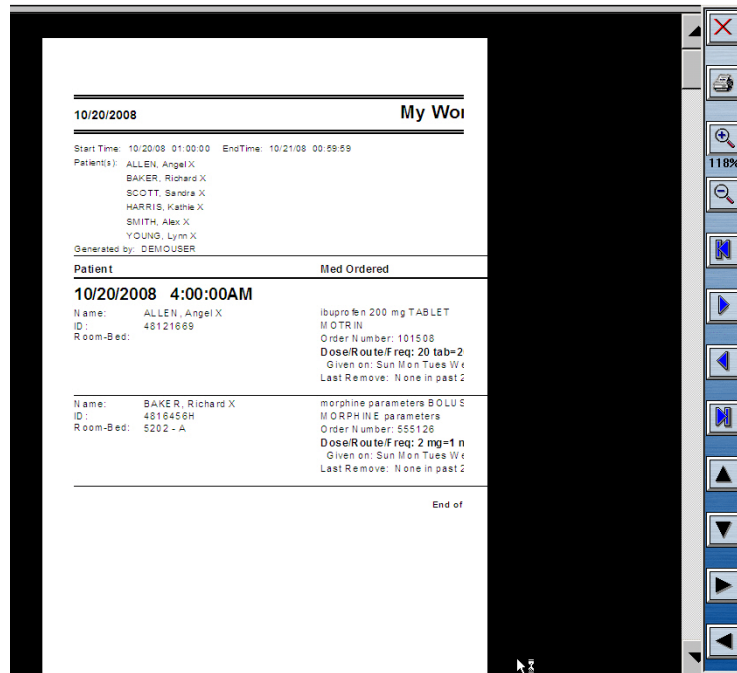
1. In the Main Menu screen, touch **Patient Summary**.
2. In the Patient Summary screen, set the **Start Time** for the worksheet.

The screenshot displays the 'Patient Summary' interface. At the top, a red header bar reads 'Patient Summary from 02/26/2009 18:00:00 to 02/28/2009 17:59:59'. Below this is a 'My Patients' section with a 'Patients' table. The table has columns for patient information and time slots from 18:00 to 05:00. The rows list patients: COLLINS, Leanna X; FISHER, Tim X; HERNANDEZ, Erin X; HILL, Cindy X; and WASHINGTON, Brad X. Below the table are 'Sort By' options (Name, ID, Rm-Bed) and a 'Select All' button. The 'Worksheet Parameters' section includes 'Start Time' (02/27/09 18:00:00), 'Span' (24), and 'Include Non-Scheduled' (unchecked). An 'Icon Legend' shows 'Overdue' (yellow circle), 'Scheduled' (red circle), and 'Has PRN, Misc or STAT Order' (blue star). A 'Cancel' button is at the bottom right.

Patients	Select	PRN /Misc	One Time /STAT	18:00	19:00	20:00	21:00	22:00	23:00	00:00	01:00	02:00	03:00	04:00	05:00
Name : COLLINS, Leanna X Room - Bed : ID : 48053011	<input type="checkbox"/>														
Name : FISHER, Tim X Room - Bed : ID : 48149482	<input type="checkbox"/>														
Name : HERNANDEZ, Erin X Room - Bed : ID : 48127095	<input type="checkbox"/>														
Name : HILL, Cindy X Room - Bed : ID : 100036651	<input type="checkbox"/>														
Name : WASHINGTON, Brad X Room - Bed : ID : 4813899E	<input type="checkbox"/>														

3. To include non-scheduled orders, select **Include Non-Scheduled**.
4. Select the patients to view or touch **Select All**.
5. Touch **View Worksheet**.

- When the worksheet appears, touch the printer icon to print the worksheet.



- Touch the **X** to close the worksheet.  
In the Patient Summary screen, touch **Cancel** to return to the Main Menu screen.





# Chapter 3

## Medication-Management Functions

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## Loading medications

Medications can be assigned to a station from the console and are considered pending when they have been assigned but not yet physically loaded. Medications can also be assigned and loaded at the station through the Assign and Load feature. One, several, or all medications can be loaded at the same time. Medications can also be loaded by drawer. Additionally, you can replace a medication that is already loaded with a different medication (for example, if the original is not used frequently enough or it was loaded in error).

When medications are loaded, a screen displays the expected count when the drawer opens. This is the amount that was assigned at the console or at the station. If the count is not correct, enter the correct amount directly or use the More or Less buttons. (Doing so may create a discrepancy.)

If the medication requires count verification and you do not have Independent Load privileges, the Rx Check icon appears and another user must verify the medication to ensure that the correct medication is in the correct pocket.

This section includes the following topics:

### Loading one medication

The following procedure explains how to load a single medication in the station.

1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, select one medication.  
The Load button appears after you make a selection.
3. Touch **Load Selections**.  
The Load screen appears showing the expected quantity to load as assigned at the console. The drawer assigned to the medication opens.
4. If the amount is incorrect, enter the appropriate quantity using the touch keypad, **Arrow** buttons, or keyboard, and touch **Accept**.  
You are required to document any discrepancies that result from changing the quantities. If a discrepancy occurs, you can document it now or touch Cancel to document the discrepancy later.
5. Load the medications and close the drawer. You do not have to close the drawer between items unless it is a carousel drawer.

### Loading multiple medications

The following procedure explains how to load multiple medications in the station.

1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, select several medications to load from the list.

3. Touch **Load Selections**.  
The Load screen appears. This screen shows the expected load quantity assigned at the console. The drawer assigned to the medication opens.
4. If the amount is incorrect, enter the appropriate quantity and touch **Accept**.  
You must document any discrepancies that result from changing the quantities. If a discrepancy occurs, you can document it now or touch Cancel to document the discrepancy later.
5. Load the medications and close the drawer.  
You do not have to close the drawer between items unless it is a carousel drawer.

## Loading all medications

The following procedure explains how to load all medications in the station.

1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, touch **Load All**.  
The Load screen appears. When you load multiple medications, the same screen appears to prompt you through each medication. The drawer assigned to the medication opens. This screen shows the expected load quantity assigned at the console.

### NOTE

If multiple medications are to be loaded in the same drawer, the station leaves non-controlled drawers open. If the same formulary item is loaded in multiple pockets, each individual medication and pocket pair is listed.

3. If the amount is incorrect, enter the appropriate quantity using the touch keypad, **Arrow** buttons, or keyboard, and touch **Accept**.  
You must document any discrepancies that result from changing the quantities. If a discrepancy occurs, you can document it now or touch Cancel to document the discrepancy later.
4. Load each medication and close each drawer as prompted by the station.

## Loading medication by drawer

This feature lets you automatically load all medications for a drawer at one time.

1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, touch **Select By Drawer**.  
The Load – Select By Drawer screen appears listing any drawers containing pending medications.
3. Select the drawer to load.  
The Load Selections button appears.

4. Touch **Load Selections**.

The Load screen appears. This screen shows the expected load quantity assigned at the console. The drawer assigned to the medication opens.

5. If the amount is incorrect, enter the appropriate quantity using the touch keypad, **Arrow** buttons, or keyboard and touch **Accept**.

You are required to document any discrepancies that result from changing the quantities. If a discrepancy occurs, you can document it now or touch **Cancel** to document the discrepancy later.

6. Load the medications and close the drawer. You do not have to close the drawer between items unless it is a carousel drawer.

### Loading medication with a scanner

Medications are associated with their barcodes at the console. At the station, scan barcoded medications as you load them.

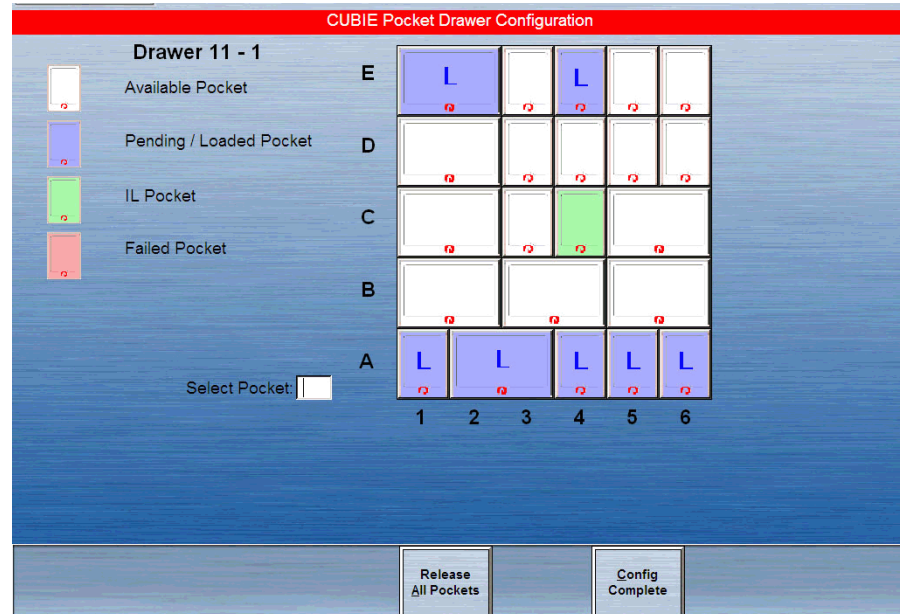
1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, touch **Scan Barcode Item**.
3. Use the station scanner to scan a barcoded medication.
4. Load the medication into the appropriate pocket.
5. Touch **Yes**.
6. Verify that the **Loaded Quantity** field matches the quantity that you are loading.
7. When you are finished, touch **Cancel** to close the drawer.

### Loading a CUBIE<sup>®</sup> pocket by using a scanner

Scan medications as you load them into the station. In addition, if you are placing the medications into CUBIE<sup>®</sup> pockets, you can scan the pocket to indicate where the medication will be loaded. (Medications are associated with their barcodes at the console.)

1. In the Main Menu screen, touch **Load**.
2. In the Load – Select By Med screen, touch **Scan Barcode Item**.
3. When the Scan Barcode Item screen appears, use the station scanner to scan a barcoded medication.
4. Scan the CUBIE pocket.
5. Touch **Yes**.
6. Verify that the **Loaded Quantity** field matches the quantity that you are loading.
7. Following the screen prompts, load each pocket in the drawer and touch **Yes**.  
The screen displays all pocket spaces in the first available CUBIE pocket.
8. To load a CUBIE pocket, touch **Display Pockets**.

- In the Display Pockets screen, touch **Next Drawer** to display the next drawer on the screen.



- Touch **Open Drawer** to open the drawer.
- Insert a pocket into any empty position with a corresponding size.

#### NOTE

If there is not an available space that matches the size of the CUBIE pocket that you are loading, you must unload a pocket to create space.

The medication name, strength, quantity, and expiration date loaded in the CUBIE pocket display on the screen.

- To accept the pocket contents, touch **Yes**.
- To cancel the load, touch **No**.
- Continue to load any remaining CUBIE pockets.
- When you are finished, touch **Cancel** to close the drawer.

## Assigning and loading medication

You can use the Assign and Load feature to assign medications at the station and then load them. (You must have Assign and Load security privileges at the station to use this feature, and you can load only the medications that your security privileges enable you to access.) During the process, you also have the option of replacing items if they are assigned to a matrix or carousel drawer.

- In the Main Menu screen, touch **Load**.
- In the Load – Select By Med screen, touch **Assign and Load**.
- In the Select Med to Assign screen, select the medication to load from the **Med** list.

### 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.

4. In the Current Inventory Sorted by Drawer – Select Drw/Pkt to Load screen, do one of the following:
  - Select the drawer where you will load the medication.
  - To replace medication that is already loaded, touch **Replace Med**.

The Enter Load Criteria screen appears. If you chose to replace loaded medication, the screen includes a warning that indicates the pocket already contains loaded medication and that an Unload process will be performed.
5. Complete the load criteria:
  - **Standard**—Select this option to make this medication standard stock. Standard stock medications are not to be removed from the station.
  - **Override Group**—Select the override group setting.
  - **Outdate Tracking**—Select to enable outdate tracking.
  - **Remove Fractional Units**—Select to remove fractional units.
  - **Drawer**—Lists the drawer for this medication.
  - **Subdrw**—Lists the subdrawer for this medication.
  - **Pocket**—Select the pocket in which the medication is loaded.
  - **Max**—Enter the maximum quantity of the medication that can go into the pocket.
  - **Min**—Enter the minimum quantity (refill point) for the medication.
  - **Current**—Displays the current quantity loaded.
6. Do one of the following:
  - To load the medication immediately, touch **Load**.
  - To load the medication at a later time, touch **Pend Med**.
7. If you are replacing an existing medication, do the following after the Unload screen appears:
  - a. Verify that the displayed amount is what currently resides in the pocket and that it matches the amount you are replacing.
  - b. Touch **Accept**.
8. If you are loading the medication now, do the following after the Load screen appears and the applicable drawer opens:
  - a. If the amount is incorrect, enter the appropriate quantity using the touch keypad, **Arrow** buttons, or keyboard, and touch **Accept**.
  - b. When the Set Expiration Date screen appears, enter the earliest expiration date.
9. Touch **Accept**.

10. If you are pending the medication, touch **Main Menu** or **Exit** after the Load – Select by Med screen appears.

## **Block loading on some stations**

This feature allows you to select specific medications to be blocked from loading for specific stations. Once blocked, the medication will not be available for loading to that device through the console or the station.

1. Select **Load** at the main menu.
2. At the Load - Select By Med screen, select **Assign and Load**.
3. At the Select Med to Assign screen, locate the item.

If it is a blocked item, the item will be greyed-out. If you try to select this item, you get a message telling you that it is blocked from loading at that device. You will not be allowed to assign the item.

### **NOTE**

Block loading can only be executed at the console inventory screen and not from the station.



## Unloading medications

If an item that you are loading is assigned to a pocket that already contains another item, you are first prompted to unload the medication in the pocket.

This section describes how to unload items from a pocket to make it available for another item. You can unload one medication, several medications, or all medications at the same time. You can also unload medications by drawer.

### Unloading one, several, or all medications

The following procedure explains how to unload medications.

1. In the Main Menu screen, touch **Unload Menu**.
2. In the Unload/Empty Bin Menu screen, touch **Unload**.
3. When the confirmation message appears, touch **OK** and choose how to unload the medications.
4. To unload all, touch **Unload All**.

The system searches the selected items for ordered medications. If any are found, a confirmation message appears.

5. Touch **YES** to unload the medication.
6. To unload one or several medications:
  - a. Select the medications to unload.
  - b. Touch **List Selections** to display the medications that you selected to unload and then touch **Continue** to return to the complete list.
  - c. Touch **Unload Selections**.

The system searches the selected items for ordered medications. If any are found, a confirmation message appears.

7. Touch **YES** to unload ordered medications or **NO** to leave ordered medications in the drawer.

The system searches selected items for standard stock medications. If any are found, a screen asks you whether to unload standard stock medications.

8. Touch **YES** to unload standard stock medications or **NO** to leave standard stock medications in the drawer.

The expected pocket and drawer counts appear on the screen and the drawer containing the medication opens.

9. If the unload quantity is incorrect, enter a different quantity or touch the **Arrow** buttons to adjust the amount.
10. If you are unloading all medications, unload each pocket in the drawer as prompted, correct the quantity as needed, touch **Accept** and close the drawer when prompted.
11. If you are unloading one or several medications, unload the medication, touch **Accept**, and close the drawer when prompted.

## Unloading medication by drawer

The following procedure explains how to unload medications by drawer.

1. In the Main Menu screen, touch **Unload Menu**.
2. In the Unload/Empty Bin Menu screen, touch **Unload**.
3. When the Unload Medications warning appears, touch **OK**.
4. In the Unload – Select By Med screen, touch **Select By Drawer**.
5. In the Unload – Select By Drawer screen, select the drawer to unload.  
The Unload buttons appear.
6. Touch **Unload Selections** or **Unload All**.  
The system searches the selected drawer inventory for ordered medications. If any are found, an Unload – Select By Drawer message appears.
7. Touch **YES** to unload ordered medications or **NO** to leave ordered medications in the drawer.  
The system searches the drawer for standard stock medications. If any are found, an Unload – Select By Drawer message appears.
8. Touch **YES** to unload or **NO** to leave standard stock medications in the drawer.
9. Unload each pocket in the drawer as prompted and correct the quantity if necessary.
10. Touch **Accept** and close the drawer when prompted.

## Unloading a CUBIE pocket

This section includes the following topics:

### Unloading a pocket by using the unload feature

The following procedure explains how to unload a pocket by using an unload feature.

1. In the Main Menu screen, touch **Unload Menu**.
2. In the Unload Menu screen, touch **Unload Empty IL Pocket**.
3. Select the CUBIE pocket with empty pockets that appears on the screen.
4. Touch **Unload Selections**.
5. In the Unload – Select By Drawer screen, do one of the following:
  - To unload all pockets, touch **Unload All**.
  - To unload by medication, touch **Select By Med**.
6. Verify that the beginning count is correct and touch **Accept**.
7. Close the lid on the CUBIE pocket.
8. When the CUBIE pocket is released, remove it and close the drawer.

## Unloading a pocket by using the load procedure

The following procedure explains how to unload a pocket by using a load feature.

1. In the Main Menu screen, touch **Load**.
2. In the Load Menu screen, touch **Scan Barcode Item**.
3. Touch **Display Pockets**.  
All medications loaded in the CUBIE pockets appear on the screen.
4. Select a medication to unload.
5. Touch **Unload Pockets**.
6. Verify that the quantity to remove in the open CUBIE pocket is correct and touch **Accept**.
7. When the pocket releases, close the lid on the CUBIE pocket and remove the released pocket.

## Emptying the return bin

The physical location of the return bin depends on your station configuration. One drawer or shelf is usually designated as a return bin for each station. If your station does not have a return bin, your system manager can designate a safe holding area that is appropriate for returning items. How often you empty the return bin depends on the procedures at your facility or pharmacy.

1. In the Main Menu screen, touch **Unload Menu**.
2. In the Unload/Empty Bin Menu screen, touch **Empty Return Bin**.

The appropriate drawer opens.

If a witness is required to empty the return bin, the Witness – List Meds screen appears requiring a witness to verify the transaction. If a witness is not required, the Empty Return Bin – Select an Item to Change Actual Quantity Found screen appears.

This screen displays the contents of the return bin.

3. Verify that the quantity of each item in the return bin is correct.
4. Do one of the following:
  - If the quantities are correct, touch **Accept Contents**, empty the contents of the return bin, and close the drawer.
  - If the quantities are incorrect, do the following:
    - a. Select the item to edit.
    - b. In the Empty Return Bin – Actual Quantity Found screen, enter the actual quantity of the medication being removed from the bin and touch **Accept**.
5. Touch **Accept Contents**, empty the contents of the return bin, and close the drawer.

The Unload/Empty Bin Menu screen reappears.

---

## Refilling medications at the station

Stock refill requests are automatically generated when you remove an item from the station and the number of items remaining is less than the station's restock (minimum) level established at the console.

Use Refill to replenish medications in a pocket at the station. You can select the medications to be refilled either by medication or by drawer.

This section includes the following topics:

### Refilling one, several, or all medications

Medications listed on the Refill report must be placed in the station to get the quantity above the refill point.

1. In the Main Menu screen, touch **Refill**.  
The Refill – Select By Med screen appears. If the default is set to Meds At/Below Min, a screen appears listing all medications at or below the minimum level.  
If the default is set to All Meds, the complete list of medications appears.
2. If necessary, touch **All Meds** to display the complete list of medications or **Meds At/Below Min** to display all medications at or below the minimum level.
3. Do one of the following:
  - To refill all medications on the list (all loaded medications in the station or all medications at or below minimum level), touch **Refill All**.
  - To refill specific medications, select one or several medications and touch **Refill Selections**.  
The appropriate drawer(s) opens.
4. In the Verify Medication Count screen, touch **Yes** or **No** and verify that the medication count is correct.
5. In the Refill screen, enter the quantity that you are refilling and touch **Accept**.
6. In the Set Expiration date screen, enter the date and touch **Accept**.
7. Refill the medications that have been brought to the station and close the drawer.

### Refilling medication by drawer

The following procedure explains how to refill medications by drawer.

1. In the Main Menu screen, touch **Refill**.
2. In the Refill – Select By Med screen, touch **Select By Drawer**.
3. If necessary, in the Refill – Select By Drawer screen, touch **All Meds** to display the complete list of medications or touch **Meds At/Below Min** to display all medications at or below the minimum level.

4. Select the drawer to refill.  
The Refill Selections and List Selections buttons appear.
5. Do one of the following:
  - To refill all applicable medications, touch **Refill All**.
  - To refill specific medications in the selected drawers, touch **Refill Selections** (the button appears after you make your selections).
  - To scan the medications, touch **Scan Barcode Item**.
6. Touch **Yes** to confirm or **No** to change the count.
7. For each medication touch **Yes**, enter the **Refill Quantity** and touch **Accept**.  
If the medication is set up to track outdates, the Set Expiration Date screen appears.
8. If prompted to do so, enter the earliest expiration date and touch **Accept**.
9. If you are refilling multiple medications, the system prompts you through each medication until you have refilled the last medication.  
If the station is set up to print slips when refilling medications, a transaction slip is printed.
10. Touch **Main Menu**.

### Refilling medication with a scanner

The following procedure explains how to refill medications with a scanner.

1. In the Main Menu screen, touch **Refill**.
2. In the Refill – Select By Med screen, touch **Scan Barcode Item**.
3. When the Scan Barcode Item screen appears, use the station scanner to scan the barcode label.
4. Verify that the medication name on the screen matches the item that you scanned.
5. Touch **Accept**.
6. Verify that the **Loaded Quantity** matches the quantity that you are loading.
7. Repeat the same steps for all medications.

---

## Taking inventory

The Inventory function allows you to count, verify, and outdate (if the Outdate option is turned on for the station) medications one drawer at a time or to select from a list of medications to inventory. You can inventory all drawers or any combination of drawers and medications.

### Accessing the inventory function

The following procedure explains how to access Inventory functions.

#### To access the Inventory function

- ▶ In the Main Menu screen, touch **Inventory**.

The Inventory screen appears.

This screen sorts by drawer, class, or medication, depending on your user preferences. You can identify which of these is activated by the title bar, which reads Inventory – Select By Drawer, Inventory – Select By Med, or Inventory – Select By Class.

You can change between Select By Drawer, Select By Class, or Select By Med at any time prior to beginning the Inventory process.

#### NOTE

If you do not have the Independent Inventory Count privilege, you will need a witness to inventory a drawer.

### Taking inventory by drawer

The following procedure explains how to inventory medications by drawer.

1. In the Main Menu screen, touch **Inventory**.
2. In the Inventory screen, touch **Select By Drawer**.

A list of all drawers in the station appears.

#### NOTE

Any time that a drawer is open with more than one high security drug exposed, all those drugs must be inventoried before the drawer is closed.

3. Do one of the following:
  - To inventory all drawers in the list, touch **Inventory All**.
  - To inventory the contents of specific drawers, select the drawers.

### NOTE

If the nursing staff is required to do only a narcotics inventory, this feature expedites the process.

The Inventory Selections and List Selections buttons appear at the bottom of the screen.

4. Touch **List Selections** to view a list of drawers that you selected.
5. Touch **Continue** to return to the previous screen.
6. Touch **Inventory Selections**.

The drawers are selected and you are prompted to inventory each.

7. Verify that the medication count for each item is correct.

### Taking inventory by medication class

The following procedure explains how to inventory medications by class.

1. In the Main Menu screen, touch **Inventory**.
2. In the Inventory – Select By Med screen, touch **Select By Class**.
3. In the Inventory – Select By Class screen, select the medication class to inventory.

The Inventory Selections and List Selections buttons appear at the bottom of the screen.

4. To view a list of selected medication classes, touch **List Selections**.
5. Touch **Inventory All** to inventory all medications in the station or touch **Inventory Selections**.
6. Verify that the medication count for each is correct.

### Taking inventory by medication

The following procedure explains how to inventory by medication.

1. In the Main Menu screen, touch **Inventory**.  
The Inventory – Select By Med screen appears.
2. To search for a medication, type the first few characters of the medication name.

A screen appears as you type the characters. The cursor selects the first medication matching the characters entered.

3. Touch **Inventory All** to inventory all medications in the station or touch **Inventory Selections**.

The Verify Quantity screen appears.

4. Count the medications in the pocket.
  - If your count does not match the count displayed in the Verify Quantity field, enter the correct amount.
  - If a medication in the pocket or drawer is expired, touch **Outdate**.
5. Touch **Accept**.

## Taking inventory with accessed inventory

Accessed Inventory is used during the current Inventory function and provides a means of filtering the Inventory process. This filter limits the inventory process only to pockets that meet BOTH of the following criteria:

1. Select **Inventory** at the main menu.
2. Select **Accessed Inventory**.

The Inventory process for all medications that meet both of the following filters begins when these criteria are both present:

- Must have the controlled substance flag on (set at the console in pharmacy configuration).
  - Must have an immediate, previous transaction for the pocket that is not an Accessed Inventory process.
3. Continue the process by following the Inventory steps.

## Suspending inventory

Taking inventory can be a lengthy process. If you are called away from the station, or if another user needs access to the station during inventory, use the Suspend Inventory feature to postpone inventory until a later time.

### NOTE

The Suspend Inventory feature is not supported by carousel drawers and single-dose MiniDrawers. If you are taking inventory on carousel or single-dose MiniDrawers, you must complete the inventory.

### To suspend inventory

1. At any point during inventory, touch **Suspend Inventory** to pause the process.
2. When the confirmation message appears, touch **YES** to suspend the inventory process.
3. Close the drawer.

You are automatically logged off from the station.

## Resuming inventory

The next time you log on, you are reminded resume the inventory process.

1. Log in to the station.



2. When the confirmation message appears, touch **Yes** to resume the inventory.
3. When the Inventory screen appears, proceed with the inventory.

## Taking inventory by drawer type

This section includes the following topics:

### Taking inventory by Carousel drawer

If you are taking inventory by drawer and the medication is in a carousel drawer, the verification screen appears. You must completely open a carousel drawer to inventory all medications.

1. When the drawer opens, touch **Unlock** to allow the drawer to open all the way.
2. Lift the panel that covers the pockets.  
The station prompts you through the inventory of each pocket in the carousel drawer.

### Taking inventory by MiniDrawer

The procedure for inventorying a medication in a subdrawer of a MiniDrawer depends on the dispensing mode of the subdrawer configuration.

- For multi-dose dispensing, you can access one pocket at a time.
- For single-dose and matrix dispensing, the drawer opens fully.

### Taking inventory by Matrix drawer

The following procedure explains how to inventory medications in a matrix drawer.

1. In the Inventory – Select By Drawer screen, select a drawer.
2. When the inventory buttons appear, touch **Inventory Selections**.  
The Inventory – Select By Med screen appears.
3. If a confirmation message appears that indicates the process may take several minutes, touch **YES** to continue.
4. Count the medications in the pocket indicated on the screen.
5. If necessary, adjust the count.
6. Touch **Accept** and close the drawer.

### Taking inventory by CUBIE pocket

The following procedure explains how to inventory medications in a CUBIE pocket.

1. In the Main Menu screen, touch **Inventory**.
2. In the Inventory – Select By Drawer screen, select a drawer and touch **Select By Med**.

3. In the Inventory – Select By Med screen, select **Med to Inventory**.  
Inventory buttons appear.
4. Touch **Inventory Selections**.  
The Inventory screen appears.
5. Count the medications in the pocket indicated on the screen.
6. If necessary, adjust the count in the field.
7. Touch **Accept** and close the drawer.

## Removing expired medication during inventory

If any of the medications in the pocket are expired, you must outdate and remove them before verifying the beginning count.

1. In the Main Menu screen, touch **Inventory**.  
The Inventory Selections and List Selections buttons appear at the bottom of the screen.
2. Make your selection from the list and touch **Inventory Selections**.
3. In the Inventory screen, touch **Outdate**.  
The message Beginning Count must be confirmed before removing outdated meds appears.
4. In the confirmation screen, touch **Yes** or **No** to verify the correct beginning medication count.  
A screen appears, identifying the name of the medication and the pocket in which it is stored.

Outdate  
morphine  
MORPHINE  
10 mg/1 mL TUBEX

Outdated Quantity:  
0 TUBEX  
Drawer 2, Pocket 1

Remove outdated meds then enter the Outdated Quantity

Accept Cancel All Meds

5. Verify that the medication name on the screen matches the one you are outdating.

If the Outdate option was activated at the console for the station and the pocket when the medication was loaded, the station checks for expiration dates. If the Outdate option was not activated, the expired medication will not show up on the list. If you suspect that the Outdate option is not activated at the console, review the medication at the console.

6. In the **Outdated Quantity** box, enter the number of expired medications that you are removing.
7. Touch **Accept**.  
The Set Expiration Date screen appears.
8. Review the medications in the pocket and find the medication that has the earliest expiration date.
9. In the **Month**, **Day**, and **Year** boxes, enter the expiration date for the medication that expires first.
10. To save the new expiration date and complete the Inventory process, touch **Accept**.

## Using the Outdate function

The Outdate function helps locate expired medications or medications that expire within 30 days. Use the Outdate function to remove expired medications from a station or to check medications at the station (that have the Outdate option activated) and verify their expiration dates. The Outdate option is activated at the console when a medication is assigned to a pocket and selected on the Devices screen.

### Accessing the Outdate function

The following procedure explains how to access the Outdate function.

- In the Main Menu screen, touch **Outdate**.  
The Outdate – Select by Med screen appears, showing medications that have already expired or that expire within the next 30 days. Only those medications that were set up at the console are listed.

### Selecting a medication to outdate

The following procedure explains how to select medications to outdate.

1. In the Main Menu screen, touch **Outdate**.  
The Outdate – Select By Med screen appears, showing those medications that have already expired or that expire within the next 30 days. Only the medications set up at the console to outdate appear.
2. Select one or more medications from the list.  
The Outdate Selections button appears on the bottom of the screen.
3. Touch **Outdate Selections**.  
The selected medication or medications are outdated.

### Checking a pocket

Checking a pocket allows you to verify expired medications. Follow these steps to check the pockets and verify expired medications.

1. Count the medications in the pocket before outdating the medication.
2. Verify that the medication name and count listed in the **Beginning Count** field match the number of medications in the pocket.
  - If the count displayed matches the quantity counted in the pocket, touch **Yes** and go to step 3.
  - If your count does not match the count displayed in the **Beginning Count** field, touch **No** and enter the actual quantity.
3. Touch **Accept**.

4. Remove any expired medications.
  - If any of the medications in the indicated pocket have expired, enter the quantity of expired medications that you are removing in the **Outdated Quantity** field.
  - If no medications in the indicated pocket have expired, enter 0 in the **Outdated Quantity** field and touch **Accept**.

### Entering a new expiration date for the pocket

The following procedure explains how to enter a new expiration date.

1. Review the medications in the pocket and find the medication that expires first.
2. In the **Month**, **Day**, and **Year** boxes, enter the expiration date for the medication that expires first.
3. Touch **Accept** to accept the new expiration date and continue the Outdate process.

## Using Rx check

The Rx Check feature is an audit tool used to ensure that appropriate medications have been loaded and refilled in the appropriate pocket. The user with this privilege audits the medications loaded and refilled by another user.

1. In the Main Menu screen, touch **Rx Check**.  
The RxCheck – Select By Med screen appears with a list of all medications that need to be checked.
2. Touch **RxCheck All** to select all listed medications or select one or more medications to check.  
The selected medications are highlighted.
3. To view a list of your selections, touch **List Selections**.
4. To print a list of all medications requiring an Rx Check, touch **Print List**.
5. To accept the refilled medication without any subsequent confirmation screens, touch **Accept As Is**.  
The transaction is complete.
6. Touch **RxCheck**.  
The drawer opens and a message appears that asks if the pocket contains incorrect medications.
  - If the medications in the pocket are correct, touch **No**. Proceed to step 9 to continue.
  - If the medications in the pocket are incorrect, touch **Yes**.  
The RxCheck screen appears.
7. Remove any incorrect medications and enter the quantity removed in the **Incorrect Quantity** box.

### NOTE

If you enter an incorrect quantity, you must verify that the count of remaining medications is correct.

8. Touch **Accept**.  
The Verify Medication Count screen appears.
9. Count the medications in the pocket.
  - If your count matches the count displayed in **Remaining Count**, touch **Yes**.
  - If your count does not match the count displayed in the **Remaining Count** box, touch **No**.  
The Verify Medication Count screen appears and a discrepancy is created.
10. Enter the verified amount in the **Remaining Count** box.
11. Touch **Accept**.



# Chapter 4

## Station Management Functions

This section includes the following topics:

<i>Managing kits</i> .....	78
<i>Managing users</i> .....	85
<i>Documenting a discrepancy</i> .....	98
<i>Recovering a failed drawer</i> .....	101



## Managing kits

A kit is a group of medications that are frequently administered at the same time. Creating a kit allows you to select one item (the kit), rather than several individual items, though you physically remove each item in the kit individually. This feature is helpful for areas that commonly administer combination medications, such as the ER or operating rooms (ORs).

This section includes the following topics:

- *Creating a kit* on page 78
- *Viewing the contents of a kit* on page 80
- *Editing a kit* on page 81
- *Deleting a kit* on page 83
- *Printing kit information* on page 84

### Creating a kit

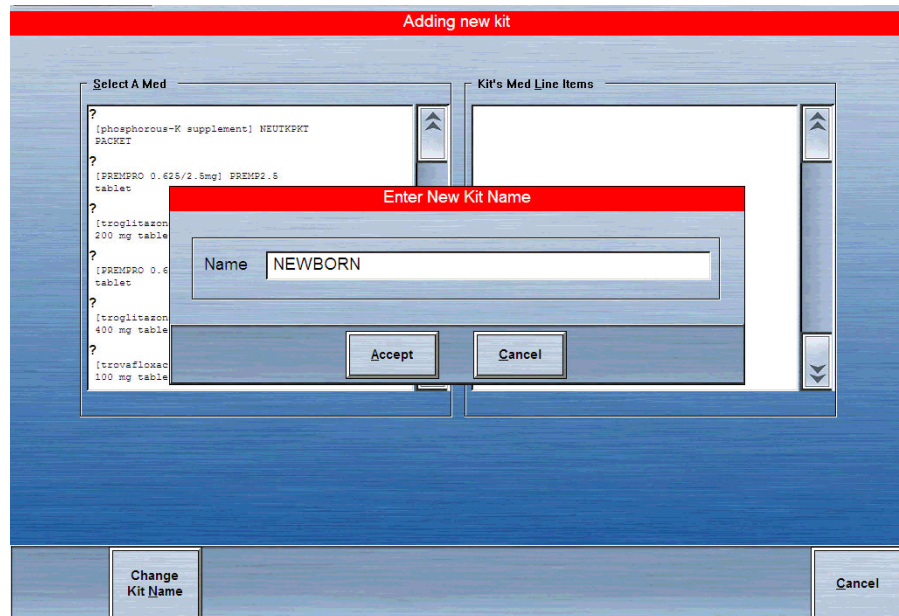
Kits can be created at the station or the console. Kits created at the console can be assigned to stations in any system area. Kits created at the station appear at all stations in the same area.

Any user assigned the station logon/witness privilege and the Remove Medication access privilege for any security group can create a kit at the station.

#### To create a kit

1. In the Main Menu screen, touch **Kits**.
2. In the Kits screen, touch **Add Kit** to create a new kit.

3. In the Enter New Kit Name dialog box, enter a descriptive name for the kit and touch **Accept**.



The new kit name is added to the list of kits.

4. Select a medication to assign to the kit.

**NOTE**

The medication list for kits includes the entire formulary so you can assign medications to kits prior to loading the medications at the station.

5. If you select an item that is not currently loaded at the station, touch **OK** when the warning appears.

6. In the next Adding Kit screen, enter the quantity of the item to assign to the kit and touch **Accept**.

The screenshot shows a software interface for adding a kit. At the top, a red header bar contains the text "Adding Kit : NEWBORN[KIT]". Below this, the item name "erythromycin ophthalmic" is displayed in blue, followed by "ERYTHROMYCIN OPHTHALMIC" in purple, and "1 GM ointment" in purple. The main area has a blue background. On the left, the text "Enter Kit Quantity:" is followed by a text input field containing the number "1" and the word "ointment". To the right is a numeric keypad with buttons for digits 0-9, a decimal point, and a "Del" button. At the bottom, there are two buttons: "Accept" on the left and "Cancel" on the right.

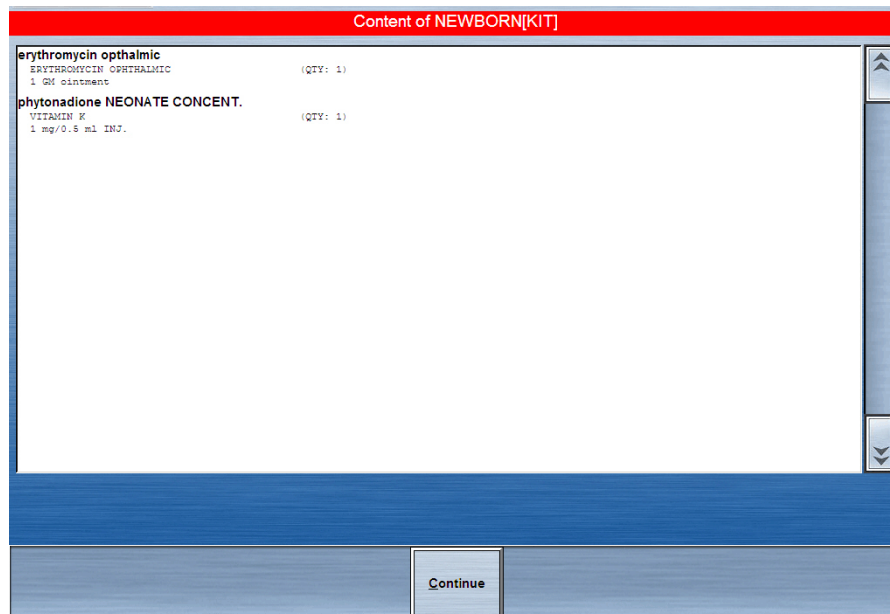
7. Repeat steps 4 through 6 until all applicable items are listed in the Kit's Med Line Items section.
8. When you are finished, click **Accept**.  
The new kit is added to the list of existing kits.

### Viewing the contents of a kit

The following procedure explains how to view the contents of a kit.

1. In the Main Menu screen, touch **Kits**.

- In the Kits screen, select the kit and touch **List Kit Content**.  
The Content of Kit screen appears.



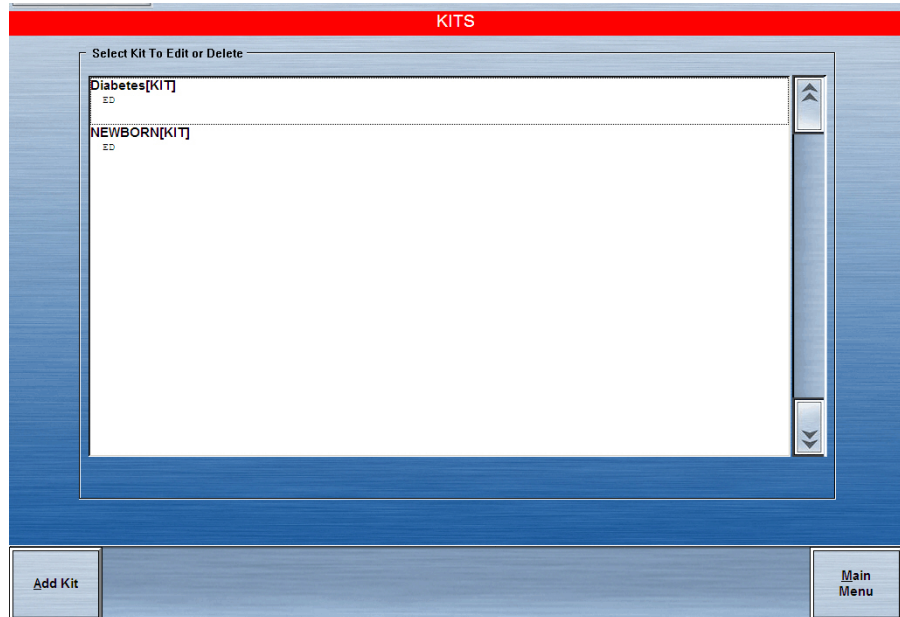
- To return to the Kits screen, click **Continue**.

## Editing a kit

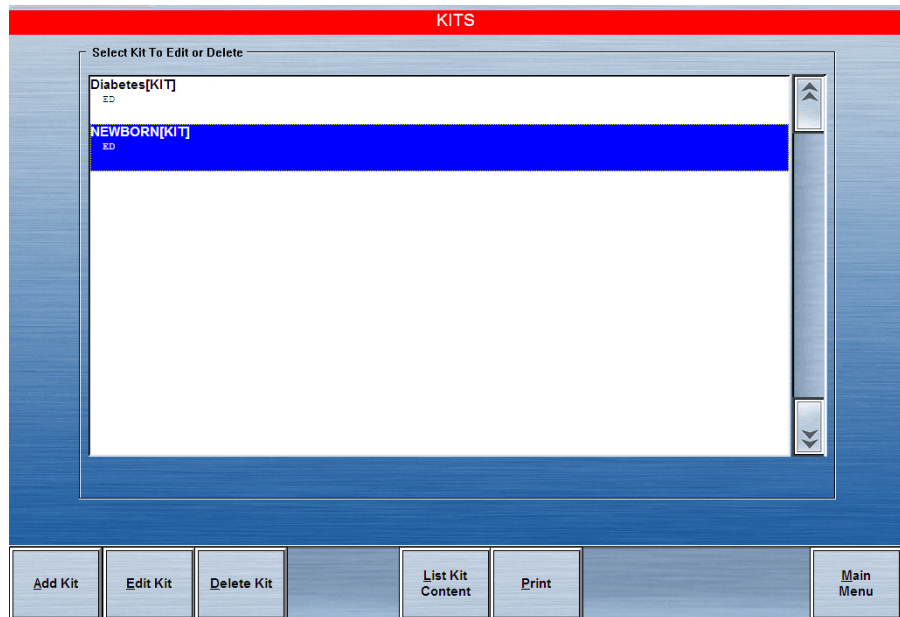
Kits that were created at a station can be edited at the station or console. Kits can be edited by changing the quantity of an item in a kit, deleting an item from a kit, or adding an item to an existing kit. You can also change the name of the kit.

- In the Main Menu screen, touch **Kits**.

2. In the Kits screen, select a kit to edit.

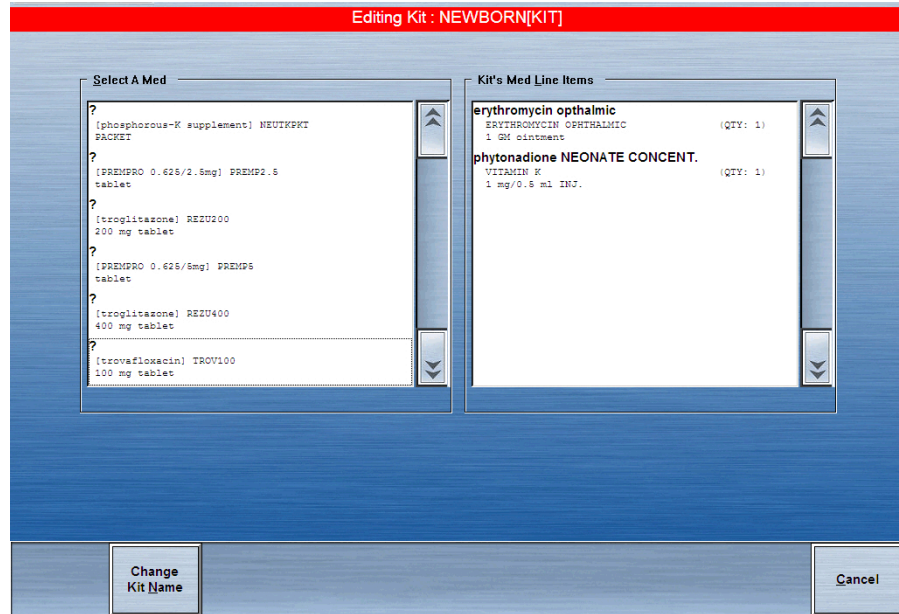


The Add Kit, Edit Kit, Delete Kit, List Kit Contents, and Print buttons appear at the bottom of the screen.



3. Touch **Edit Kit**.

The Editing Kit screen appears.



## 4. In the Editing Kit screen, do any of the following:

- To change the name of the kit, touch **Change Kit Name**. Enter the new name and touch **Accept**.
- To change the quantity of an item that is already assigned to the kit, select the item in the Kit's Med Line Items section and touch **Change Med Qty**. Enter the new quantity and touch **Accept**.
- To remove an item that is currently assigned to the kit, select the item in the Kit's Med Line Items section and touch **Delete Med Item**. In the confirmation screen that appears, touch **YES** to continue.
- To add an additional item to the kit, select the item in the Select a Med section, enter the quantity in the next screen that appears, and touch **Accept**.

5. Touch **Accept** to save your changes.

## Deleting a kit

The following procedure explains how to delete a kit.

1. In the Main Menu screen, touch **Kits**.
2. In the Kits screen, select a kit.

The Add Kit, Edit Kit, Delete Kit, List Kit Contents, and Print buttons appear on the bottom of the screen.

3. Touch **Delete Kit**.
4. When the confirmation message appears, touch **YES** to delete the kit.

## Printing kit information

The following procedure explains how to print a list of items contained in the kit.

1. In the Main Menu screen, touch **Kits**.
2. In the Kits screen, select a kit.
3. Touch **Print**.

A slip prints, listing the medications in a kit, the quantity of medications, the dosage in each quantity, and the medication IDs (med IDs).

---

## Managing users

The User Maintenance functions available to you depend on your access privileges.

- **Change Password**—If your user ID on the console is set to Expire Initial Password, you will be prompted to change your password the first time you log in. You can also change your password at any time as a safety measure or when you are notified that your password is about to expire.
- **Change Biometrics**—BioID enables you to quickly access a station, by scanning your fingerprint and comparing it to your fingerprint image that is registered with the system.
- **Activate User**—With the appropriate system privileges, you can add a temporary or permanent user to the station or activate an existing user, with their current privileges.
- **User Preferences**—You can select default settings for many of the station screens (for example, the menu that appears when you log in and how you want information sorted).
- **My Patients**—This function creates a custom patient list that allows you to view only the patients for whom you are providing care.

This section includes the following topics:

- *Activating an existing user as a visitor on page 85*
- *Creating a temporary user on page 87*
- *Creating a permanent user at your station on page 88*
- *Setting user preferences on page 93*
- *Customizing your patient list on page 96*

### Activating an existing user as a visitor

A nurse who usually works in a different part of the facility may need to work in your unit or use your station to obtain medications. If so, you can provide the nurse with visitor access. A nurse with visitor access to the area served by your station retains all the privileges assigned at the console.

#### NOTE

Each station and user is assigned to an area. Area names are used to define the geographic locations (usually nursing units or groups of nursing units) associated with station users.

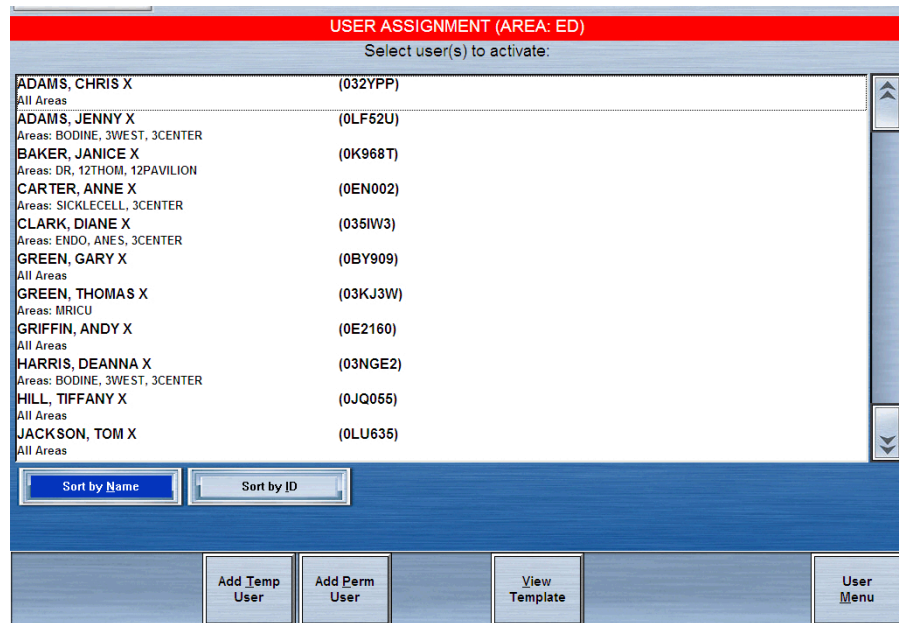
If you activate a user at your station, that person is activated at all stations in your area for a specified period of time.

### To assign your station area as the visiting area for an existing user

1. In the Main Menu screen, touch **User Menu**.

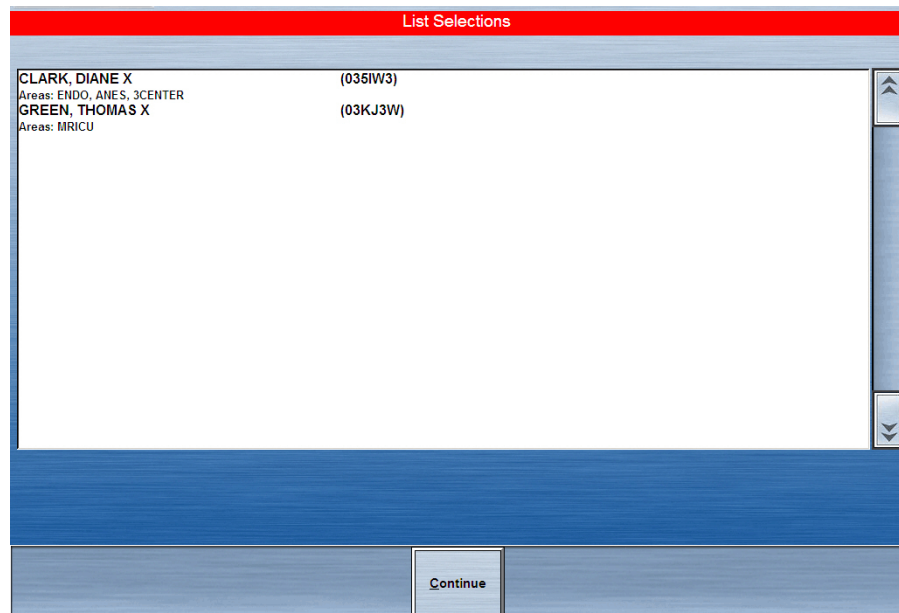


2. In the User Maintenance Menu screen, touch **Activate User**.
3. In the User Assignment screen, select one or more users to designate as visitors at your station.



The Activate and List Selection buttons appear.

4. To view a list of the selected users, touch **List Selections**.
5. In the List Selections screen, touch **Continue** to return to the previous screen.



6. Touch **Activate** to activate the users that you selected as visitors to this station. A confirmation message appears.

7. Touch **YES** to activate the users.

The users are activated as visitors to the area covered by your station and are added to the User Assignment list, which shows the area and time that the user's access expires.

**NOTE**

The duration of all activated temporary users is set at the console. The range is 0 to 99 hours.

## Creating a temporary user

Regular users are added to the system and their access privileges are defined at the facility console. However, you may need to add a user on a temporary basis, such as a visiting nurse. To give temporary access to nurses, doctors, or other personnel who do not have a permanent user ID, you can create a temporary user.

Users who have the Activate/Create Temporary User privilege can add temporary users at the station. Temporary User privileges can be customized with the Devices menu option at the console. Temporary users can change their password and act as a transaction witness when one is required. The temporary user ID automatically expires after the time that is designated at the console.

Make sure that you are present when the temporary user first logs on to ensure that they immediately change their password.

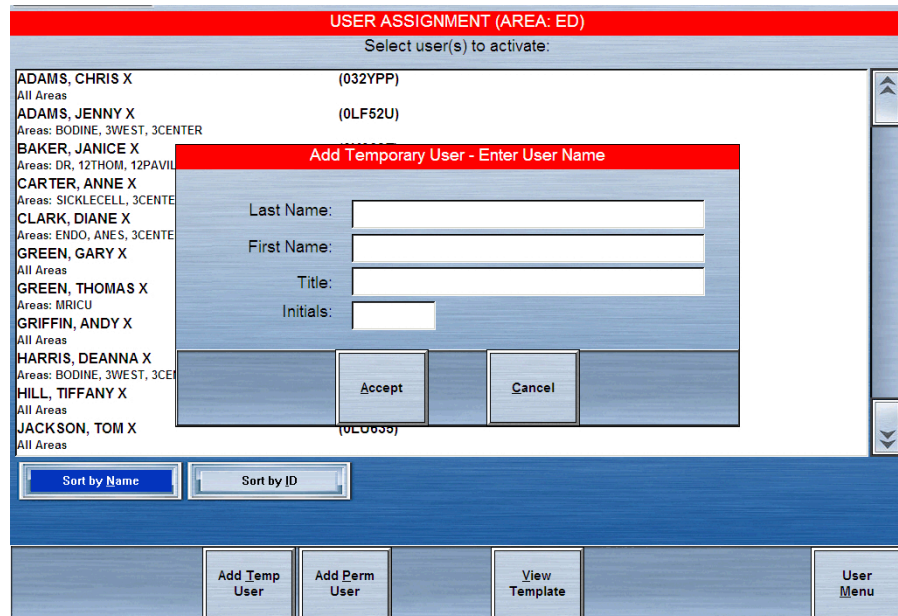
### To add a temporary user at the station

1. In the Main Menu screen, touch **User Menu**.
2. In the User Maintenance Menu screen, touch **Activate User**.
3. In the User Assignment screen, touch **Add Temp User**.

**CAUTION**

- Be sure that there is paper in the printer before you touch Accept. Otherwise, you will have no way of knowing the user ID and password.
- Although you can enter up to 20 characters in each field, the system limits the combined total to 20 characters. The result stored in the database may include a truncated version of the first name

- In the Add Temporary User – Enter User Name dialog box, enter the temporary user’s last name and first name (up to 20 characters each), and touch **Accept**.



- In the User Assignment screen, touch **View Template** to view the preconfigured settings (set at the console) for a temporary user.  
A user ID and password are automatically assigned and printed on a transaction slip. The temporary user is added to the user list. The user list shows the area and the time that the temporary user’s access expires.
- Have the temporary user log in and immediately change his or her password.

**CAUTION**

To prevent unauthorized access, be sure that the transaction slip with the user ID and password is disposed of properly.

**NOTE**

The duration of all activated temporary users is set at the console and may be different for various stations.

**Creating a permanent user at your station**

The Add Permanent User function gives nurses the ability to add users to the system without the assistance of the system manager. Your facility has its own policies and procedures on how to use this feature. Users added at a station are automatically assigned to the station area and cannot be assigned to a different area. Station privileges can be assigned at the station (by users with access privileges), but console privileges cannot.

**NOTE**

You must have the Create a Permanent User privilege for this option to be available to you.

**To set up a permanent user for the area served by your station**

1. In the Main Menu screen, touch **User Menu**.
2. In the User Maintenance Menu screen, touch **Activate User**.
3. In the User Assignment screen, touch **Add Perm User**.

The Add Permanent User screen appears with the General tab selected.

4. Enter the appropriate information:
  - **Last Name**—Enter the user's last name (up to 20 characters).
  - **First Name**—Enter the user's first name (up to 20 characters).

**NOTE**

Although you can enter up to 20 characters in each field, the system limits the combined total to 20 characters. The result stored in the database may include a truncated version of the first name.

- **ID**—Enter a unique user ID of up to 10 alphanumeric characters.
- **ID valid until**—Values are set at the console and can be modified here.
- **Password**—Enter up to six alphanumeric characters for the user's initial password.

**NOTE**

If the Expire Initial Password feature is set at the console, you must enter a new password on initial access to the station.

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

5. Touch the **Stn Privs** (Station Privileges) tab.

The Station Privileges screen appears.



6. Assign the appropriate user privileges.
  - **Station Login/Witness Ability**—Allows you to change their password, print their activity transactions, and act as a witness.
  - **Create Temporary User**—Allows you to create temporary users with limited access to a station, primarily as a witness or to remove medications.
  - **Independent Inventory Count**—Allows you to perform an inventory count without a witness. You must also have access to medications to perform the inventory.
  - **Independent Load**—Allows you to change those items that require an RxCheck to not require an RxCheck. This privilege is typically given to pharmacists. If a pharmacist is loading the medication, they do not need another user to RxCheck that item. If a pharmacy technician loads the pocket, then the facility may enforce another pharmacy technician or a pharmacist to perform an RxCheck on that item.
  - **Independent Refill**—Allows you to refill items that require RxCheck without verification of the loaded item by a witness.
  - **Independent Discrepancy Doc**—Allows you to document discrepancies at the station without a witness.
  - **Unload Standard Stock**—Allows you to unload medications designated as standard for your facility.
  - **Station Administrator**—Allows users (who are responsible for initial setup and troubleshooting of the system) to add, modify, and delete stations, including 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 screen, and transplanting data.

Typically, this privilege is assigned to those who have completed the MedStation System Manager training course.

- **Create Permanent User**—Allows you to create a permanent user for the station area and assign station access privileges.
- **Admit/Edit/Discharge Patients**—Allows you to add, edit, and discharge patients at the station. The patient information appears on the Entered ADT Information report at the console and indicates the user that made the entry.
- **Credit Patients**—Allows you to credit a patient for the waste of an entire medication at the station.
- **Station Report Access**—Allows you to run any report at the station. Users without this privilege can run reports only on their own activities.
- **No Witness Required**—Allows you to remove, return, and waste medications without a witness.
- **Order Confirmation**—Allows you to confirm orders.
- **Assign / Load Access**—Allows all Login and Witness privileges. Also allows you to assign and load formulary items at the station.
- **Add Temporary Patients**—Allows all Login and Witness privileges. Also allows you to add temporary patients during Remove, Return and Waste transactions.

**NOTE**

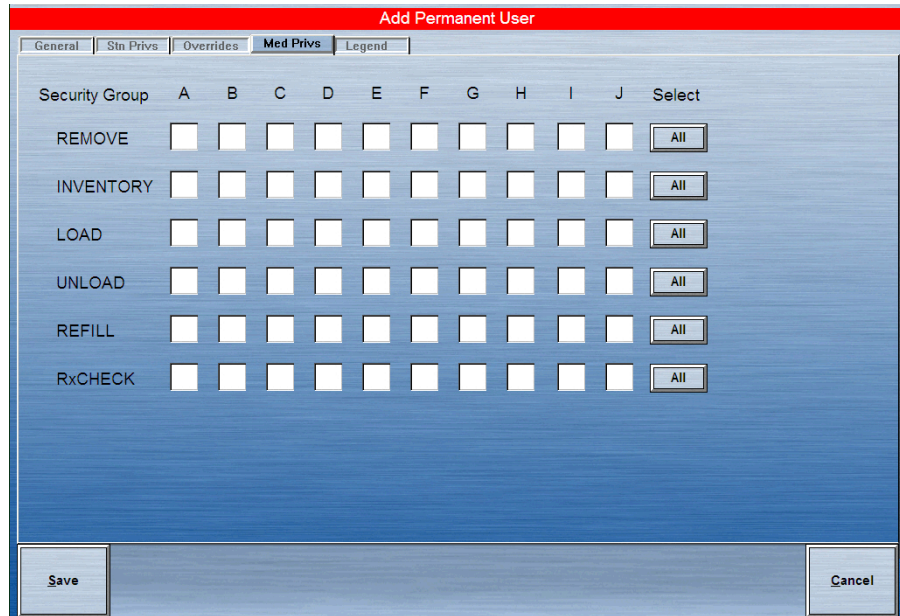
You cannot assign privileges that you do not have.

7. To set override privileges, touch the **Overrides** tab.
8. In the Overrides tab, select the types of medications to access with the Profile Override feature.



9. Select the **Med Privs** tab.

The Med Privs screen appears.



- The security groups are not hierarchical. Each security group value is independent of the other.
  - The names of security groups can be customized at the console.
10. For each function, select your security groups.  
You can select some or all security groups for each function.
  11. To view the definitions of the security groups A through J, touch the **Legend** tab.



12. Touch **Save** to save your information.

**NOTE**

After you save your information, any further changes to your assignment or privileges must be made at the console.

13. Log in immediately and change passwords to maintain the security of the system.

## Setting user preferences

You can select a procedure or menu to appear when you log in to the station, and you can select how information is sorted. When you select preferences that appear when you log in, the other options are still available.

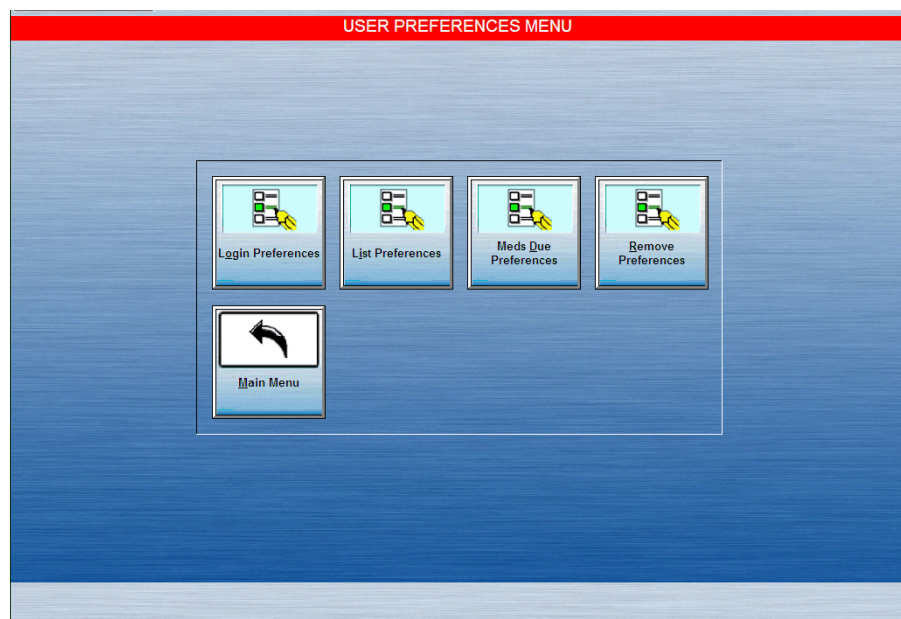
User preferences are set for your ID. After you have selected your preferences, those preferences are activated for all stations that you have access to with your user ID.

**NOTE**

The preferences you select take effect the next time you log in.

### To select your personal preferences

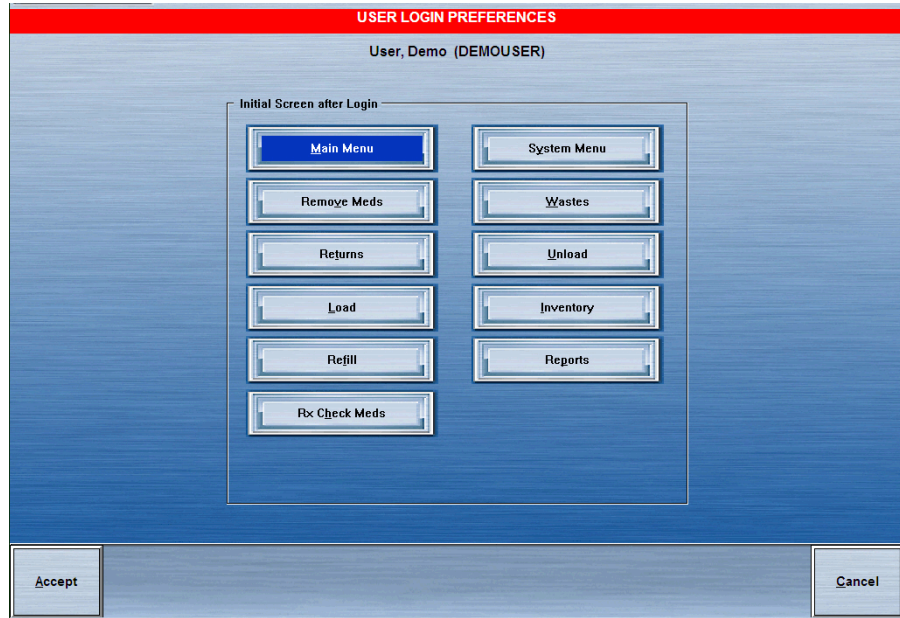
1. In the Main Menu screen, touch **User Menu**.
2. In the User Maintenance Menu screen, touch **User Preference Menu...**
3. In the User Preferences Menu screen, touch **Login Preferences**.





4. In the User Login Preferences screen, select a default screen and touch **Accept**.

The button that you select is shaded in dark blue. The screen that you select appears as the default screen the next time that you log in.



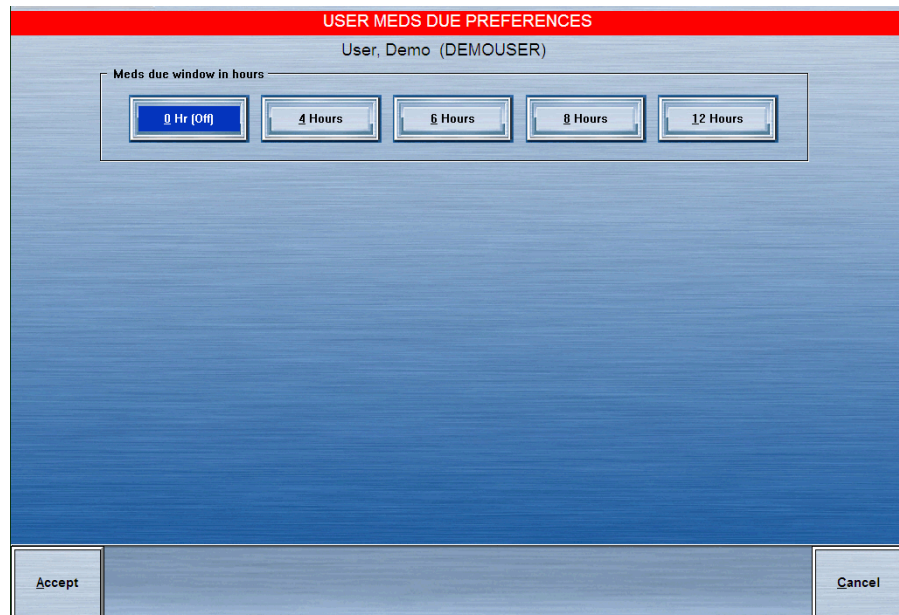
5. In the User Preferences Menu screen, touch **List Preferences** to set the default sort settings for lists.

Make your choices based on what is most effective for your job.

The active buttons are dark blue.

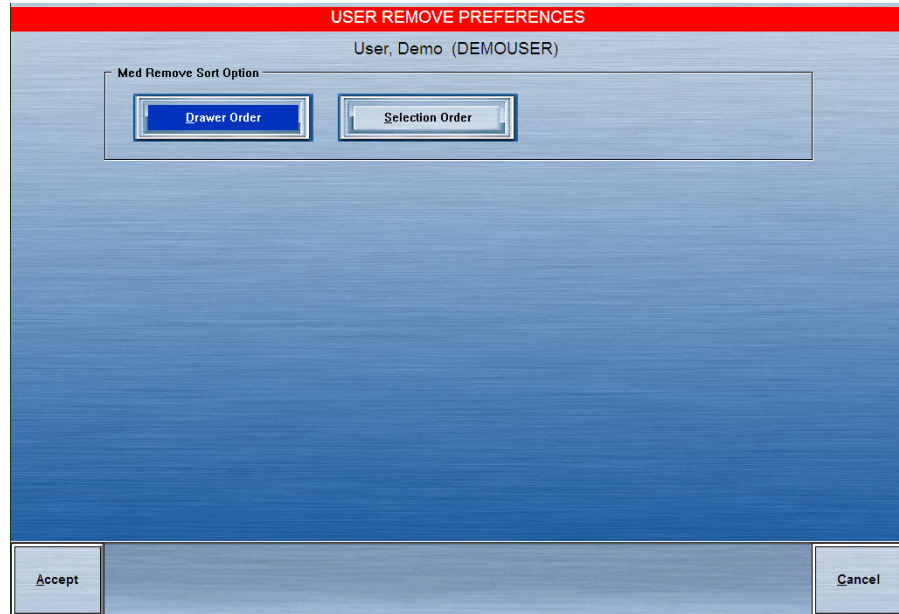


- **Med List Sort Option**—Allows you to sort the Med List by generic name (**Generic Name**) or brand name (**Brand Name**). The default is Generic Name.
  - **Return List Option**—Allows you to sort the Return List by the order which medications were selected (**Order Selected**) or by drawer and pocket order (**Drawer-Pocket**). The default is sort Order Selected.
  - **Patient List Option**—Allows you to select a default patient list. You can select all patients (**All Patients**) or your customized patient list (**My Patients**). The default is All Patients.
  - **Refill List Option**—Allows you to select a default list for refilling medications. You can select medications that are at or below the minimum (**Meds At/Below Min**) or all medications (**All Meds**). The default refill list is Meds At/Below Min.
  - **Patient List Sort Option**—Allows you to sort the patient list by patient name (**Pt. Name**), patient ID (**Pt. ID**), or room/bed (**Rm-Bed**). The default is sort by Pt. Name.
  - **Inventory List Option**—Allows you to display the inventory by drawer (**By Drawer**), medication (**By Med**), or class (**By Class**) when you are taking inventory. The default is By Drawer.
6. Touch **Accept**.
  7. In the User Preferences Menu screen, touch **Meds Due Preferences** to set the default interval for medications due.
  8. Select **0, 4, 6, 8, or 12** hours (the default is 0).



9. Touch **Accept**.  
The User Preferences Menu appears.
10. Touch **Remove Preferences** to set default remove preferences.
11. In the User Remove Preferences screen, select the applicable option.

- **Drawer Order**—Remove selected medications in order of drawer number.
- **Selection Order**—Remove selected medications in the order in which they were selected.



12. Touch **Accept**.

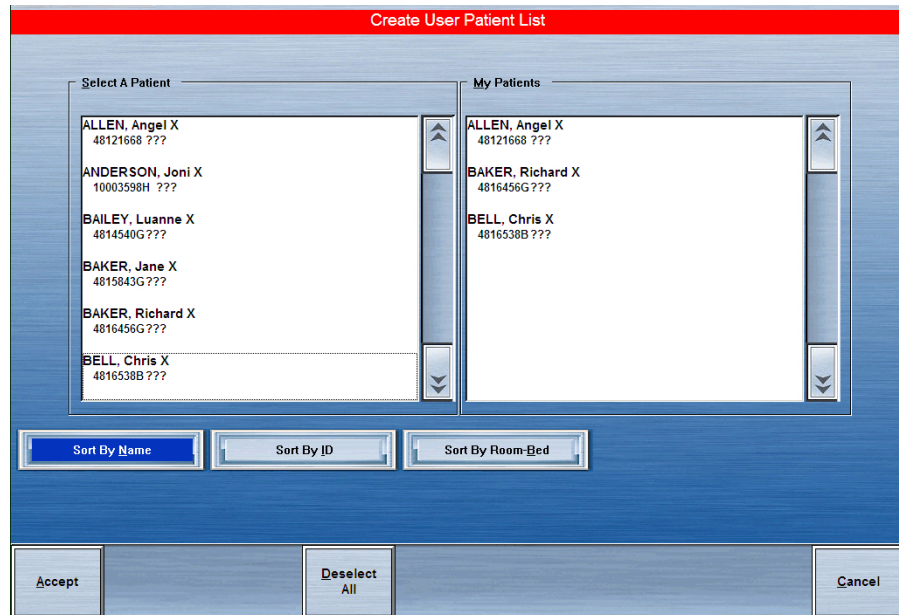
### Customizing your patient list

This option creates a custom patient list that allows you to view only the patients for whom you are providing care. Using the My Patients feature gives you access to only those patients that you have selected for your patient list.

1. In the Main Menu screen, touch **User Menu**.
2. In the User Maintenance Menu screen, touch **My Patients**.

3. Select the patient names from the Select a Patient list on the left side of the screen.

The selected patients are added to the My Patients list on the right side of the screen.



4. If you make a mistake, select the name to remove from the My Patients list and the patient name is removed.
5. To remove all patients from your list, touch **Deselect All**.
6. Touch **Accept** to finalize the My Patients list.

## Documenting a discrepancy

This section describes how to document discrepancies that can occur when you remove, load, unload, refill, or check inventory at the station. A discrepancy occurs when you are required to enter the number of medications in a pocket and the quantity that you enter does not match the count expected by the system.

When a discrepancy occurs, the Document Discrepancy alert icon appears at the bottom of the Main Menu screen and the Document Discrepancy button appears in the Station Management section of the Main Menu screen.

### NOTE

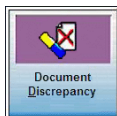
Discrepancy information is maintained at the console and station for 31 days.

To document a discrepancy, select the applicable procedure.

- *Documenting a discrepancy by using the discrepancy feature* in the next section.
- *Documenting a discrepancy while loading a medication* on page 99

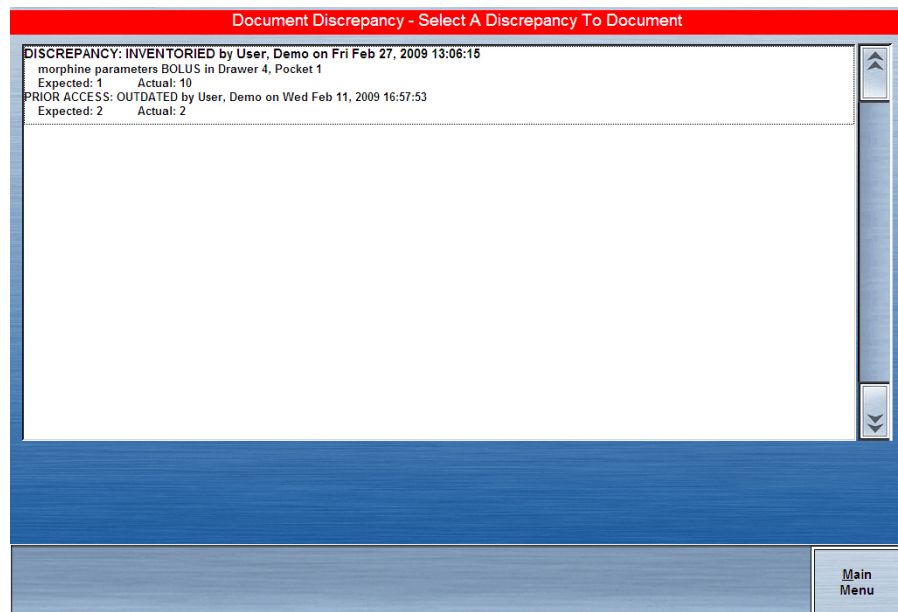
## Documenting a discrepancy by using the discrepancy feature

The following procedure explains how to access the feature and document the discrepancy.



1. In the Main Menu screen, touch **Document Discrepancy**.

The Document Discrepancy - Select A Discrepancy To Document screen appears with a list of undocumented discrepancies.



2. Select a discrepancy to document.

3. If a witness is required, ask the witness to enter his or her ID and password and touch **Accept**.

The Document Discrepancy screen appears.

Some common reasons for a discrepancy are defined at the console and displayed at the station. Page down by using the arrows to view additional resolutions.

4. Do one of the following:
  - If the reason for the discrepancy appears on the list, select the reason and touch **Accept**.
  - If the discrepancy reason is not on the list, touch **Other**. In the Document Discrepancy – Enter Discrepancy Resolution screen, enter a reason of up to 60 characters.



The screenshot shows a mobile application interface. At the top, there is a red header bar with the text "Document Discrepancy - Enter Discrepancy Resolution". Below the header is a large blue area. On the left side of this blue area, there is a small icon of a document with a checkmark. At the bottom of the screen, there are two buttons: "Accept" on the left and "Cancel" on the right.

5. Touch **Accept**.

The discrepancy is documented.

## Documenting a discrepancy while loading a medication

Any time that a medication requires the quantity to be verified, changing the count creates a discrepancy. When a discrepancy is created during a load procedure, the quantity being loaded differs from the amount entered at the console, located in the pharmacy. There are many valid reasons why this could occur. The Document Discrepancy feature provides an audit trail for these situations.

If you create a discrepancy while using the Load feature, the discrepancy documenting process will begin.

**To accept the discrepancy**

1. Touch **Yes**.

If documentation is required for the medication that is being loaded, the Document Discrepancy – Select a Discrepancy to Document screen appears.

2. If the reason for the discrepancy appears on the list, select the reason and touch **Accept**.
3. If the reason does not appear on the list, touch **Other**.
4. In the Document Discrepancy – Enter Discrepancy Resolution screen, enter a reason and touch **Accept**.

The transaction slip prints, showing the documented discrepancy.

## Recovering a failed drawer

This section describes how to recover a failed drawer. A failed drawer can occur if a drawer is left open too long, a package is protruding above the drawer so that it does not open, or if there is a mechanical failure.

When a drawer fails, several things happen:

- The Drawer Failure icon appears at the bottom of the screen at both the station and the facility console.
- An attention notice appears.
- In certain station activities (such as Remove and Take Inventory), the items in the failed drawer appear shaded on the screen.
- The Recover Drawer button appears in the System Management section on the Main Menu screen.

The Recover Drawer function allows you to recover the failed drawer.

### To recover the failed drawer

1. In the Main Menu screen, touch **Recover Drawer**.
2. In the list of failed drawers that appears, select the drawer to recover.

#### NOTE

You will need a witness unless you have the Independent Inventory Count or No Witness Required privilege.

3. If a Witness screen appears, have a witness enter his or her user ID and password.

The witness is there to verify the Inventory process at the end of a successful recovery.

The station attempts to force the drawer open. If the drawer opens, a message appears prompting you to close the drawer. Check the medication packages in each pocket to make sure that none are above the top of the pocket.

If the drawer is a carousel, you are prompted to inventory the contents of the drawer after you recover it.

4. Close the drawer and touch **Done**.
  - If the recovery is successful and the medications do not require a count verification, the process is complete.
  - If the recovery is *not* successful, contact the TSC.
  - If a medication count or inventory is required, a Verify Count screen appears.





# Chapter 5

## Reports

This section describes the reports that you can generate from the Reports Menu and explains how to do so.

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<i>Report descriptions</i> .....	105
<i>Recommended reports</i> .....	111
<i>Generating reports</i> .....	112

## Available reports

Information for reports is pulled from the following:

- Transactions, stored at the station for up to 32 hours and maintained up to 31 days at the console.
- Open discrepancy information, stored at the station for 31 days.
- Resolved discrepancies, stored at the station for the transaction hold time (up to 32 hours) that was set at the console.

From the Reports Menu you can generate reports from the following categories:

- **Inventory**—Lists counts, locations, and other information about medications stored in the station.
- **Refill**—Lists all medications at the station that are at or below minimum levels and need to be refilled. The report is sorted by drawer, listing only those medications that are at or below minimum level for the drawer. It identifies the drawer, pocket, generic and brand medication name, maximum, minimum, current count, and suggested amount to add to the station.
- **Activity**—Allows you to list and monitor all transactions at the station for the reporting period specified in the Station Configuration screen on the console. Use these reports to monitor the following tasks:
  - User access
  - Medication activity for patients
  - Transactions involving selected or all medications
  - Drawer access
  - Current user activity
  - Refill and load verification activity
- **Discrepancy**—Identifies all documented and undocumented discrepancies at the station. Discrepancies are considered documented when an explanation or resolution is entered for the discrepancy at the station.
- **Returns/Wastes**—Allows you to track medications that are returned to the station or wasted at the station. The information generated in these reports is based on the transaction hold-time set up at the console.
- **System**—Lets you monitor and track information regarding patients, pockets, users, and the facility formulary.
- **Override**—Lists override activities associated with users, medications, and patients.
- **Clinical**—Includes all medication transactions within the last 24-hour period. They can be printed on demand or via batch. Reports print at the station printer or a network laser printer in the patient-care area or pharmacy.

## Report descriptions

The following table describes the reports available in each category:

Category	Name	Description
Inventory	Inventory By All Meds	Lists all medications stocked at the station. Includes the generic and brand medication name, drawer, pocket, maximum, minimum, and current count.
	Inventory By Selected Meds	Lists selected medications stocked at the station. Includes the generic and brand medication name, drawer, pocket, maximum, minimum, and current count. For profile stations, some reports also display the Override Group (O/G) for each medication.
	Inventory By All Drawers	Lists the drawer number and all medications contained in each drawer. Includes the drawer, pocket, generic and brand medication name, maximum, minimum, and current count.
	Inventory By Selected Drawers	Lists all medications in selected drawers of the station. Includes the drawer, pocket, generic and brand medication name, maximum, minimum, and current count.
	Inventory By Remote Stock	Shows the inventory of all medications associated with this station that are stocked outside the station. Includes the location, generic and brand medication name, maximum, minimum, and current count.
	Inventory By Outdated Meds	Lists all medications at the station that will expire in the current month. Includes drawer number, pocket, generic and brand medication name, med ID, inventory count, and expiration date of the medication. This report is only available if the Outdate option is selected at the console.
	Ord Meds Not Loaded (Equiv Not Allowed)	Lists all ordered medications that are not yet loaded at the station. (Equivalencies are not included.) Includes the generic and brand medication name, med ID, patient name, patient ID, room number, bed number, and order information (such as order number, dose quantity, strength, volume, start and stop order times, and notes).
	Ordered Meds At Or Below Min	Lists all ordered medications at the station that are at the minimum or below minimum level. Includes drawer, pocket, generic and brand medication name, maximum, minimum, current count, and suggested number to be added.
	Ord Meds Not Loaded (Equiv Allowed)	Lists all ordered medications that are not yet loaded at the station. Equivalencies are included.
Refill	Refill	Lists all medications at the station that need to be refilled.

Category	Name	Description
Activity	Activity By Current User	Lists transactions by date and time for all or specific medication classifications for the user currently logged on the station. Includes user name, user ID, activity, amount, generic and brand medication name, drawer, pocket, date/time, med ID, patient, and patient ID.
	Activity By All Users	Lists transactions by date and time for all or specific medication classifications for all users at the station. Includes user name, user ID, activity, amount, generic and brand medication name, drawer, pocket, date/time, med ID, patient, and patient ID.
	Activity By Selected Users	Lists the chronological station activity by selected users at the station. Includes user name, user ID, activity, amount, generic and brand medication name, medication class, drawer, pocket, date/time, med ID, patient, and patient ID.
	Activity By All Patients	Generates a chronological list of all patient's transactions at the station. Includes patient name, patient ID, activity, amount, generic and brand medication name, medication class, drawer, pocket, date/time, med ID, user, and station name.
	Activity By Selected Patients	Generates a chronological list of all transactions at the station for selected patients. Includes patient name, patient ID, activity, amount, generic and brand medication name, medication class, drawer, pocket, and date/time, med ID, user, and station name.
	Activity By All Meds	Lists patient and non-patient activity at the station for all medications. Includes the medication name, med ID, activity, user, user ID, date/time, drawer, pocket, location, patient, patient ID, and station.
	Activity By Selected Med	Lists the activity at the station by selected medications. Includes medication name, med ID, activity, user, user ID, date/time, drawer, pocket, location, patient, patient ID, and station. Useful when investigating a discrepancy.
	Activity By All Drawers	Lists drawer activity for all drawers. Includes drawer, pocket, generic and brand medication name, med ID, amount, activity, user, and date/time, patient, and patient ID.
	Activity By Selected Drawers	Lists drawer activity by selected drawers. Includes drawer, pocket, generic and brand medication name, med ID, amount, activity, user, and date/time, patient, and patient ID.
	Refill and Load Verification Activity	Lists medications requiring a pharmacist check on load or refill. Includes station name, generic and brand medication name, med ID, drawer, pocket, loaded or checked, amount, user, user ID, and date/time. Tracks medication activity by drawer as either pending, verified, wrong medication, or wrong number.

Category	Name	Description
Discrepancy	All Discrepancies	Lists all documented and undocumented discrepancies at the station (31 days for undocumented discrepancies and up to 32 hours for documented discrepancies). Discrepancies are sorted by drawer. Includes generic and brand medication name, drawer, pocket, discrepancy access (expected, found quantity), prior access (activity, quantity, beginning and end quantity), and resolution information. Note: The report prints all medication discrepancies; you cannot print selected medications only.
	Undocumented Discrepancies	Lists all undocumented discrepancies at the station for up to 31 days. Discrepancies are listed alphabetically by medication. Includes generic and brand medication name, drawer, pocket, maximum, minimum, and current count. Note: The report prints all undocumented discrepancies; you cannot print selected medications only.
	Documented Discrepancies	Lists all documented discrepancies at the station for up to 32 hours. Discrepancies are sorted by drawer. Includes generic and brand medication name, drawer, pocket, discrepancy access, prior access, and resolution information of all documented discrepancies at the station.

Category	Name	Description
Returns/ Wastes	Returns/Wastes By All Users	Lists all returns and wastes for all users at the station. The amount given and amount wasted are listed on wasted transactions only. Includes user name, user ID, return or waste, generic and brand medication name, date/time, med ID, patient name, patient ID, and amount returned or wasted for each remove transaction.
	Returns/Wastes By Selected Users	Lists returns and wastes for selected users. Includes user name, user ID, return or waste, generic and brand medication name, date/time, med ID, patient name, patient ID, and amount returned or wasted for each remove transaction.
	Returns/Wastes By All Patients	Lists returns and wastes for all patients at the station. Includes patient name, patient ID, return or waste, generic and brand medication name, date/time, med ID, user, user ID, and amount returned or wasted for each remove transaction.
	Returns/Wastes By Selected Patients	Lists returns and wastes for patients that are selected from the station. Includes patient name, patient ID, return or waste, generic and brand medication name, date/time, med ID, user, user ID, and amount returned or wasted for each remove transaction.
	Returns/Wastes By All Loaded Meds	Lists returns and wastes for all medications at the station. Also identifies the witness for any return and wastes that require a witness. Includes generic and brand medication name, med ID, wasted or returned, user, user ID, date/time, amount returned or wasted for each remove transaction, drawer, pocket, and the location where the medications were removed.
	Returns/Wastes By Selected Meds	Used to track returns or wastes for a specific medication. Also identifies the witness for any returns and wastes that require a witness. Includes generic and brand medication name, med ID, wasted or returned, user, user ID, date/time, amount given, amount wasted, drawer, pocket, and location where removed.
	Undocumented Waste	<ul style="list-style-type: none"> <li>• <b>Undocumented By All User</b>—Displays all undocumented waste for all users stored at the station and is grouped by user.</li> <li>• <b>Undocumented By Selected Users</b>—Displays undocumented waste for a selected user and is grouped by user.</li> <li>• <b>Undocumented By All Meds</b>—Displays all undocumented waste for all medications stored at the station and is grouped by medication.</li> <li>• <b>Undocumented By Selected Meds</b>—Displays undocumented waste for a selected medication and is grouped by medication.</li> </ul>

Category	Name	Description
System	Complete Patient Listing	Identifies all patients at the station. Includes patient name, ID, room, bed, and the hold until date for each patient.
	Selected Patient Listing	Identifies selected patients at the station listed alphabetically by patient name. Includes patient name, ID, room, bed, and the hold until date for each patient.
	Complete Patient and Order Listing	Lists all patients and their order information. Includes nursing unit, patient, patient ID, nursing and visit unit with discharge date and time, comments, order number, generic and brand medication name, start date/time, stop date/time, one time medication or on hold order, ordered quantity, and dose. Also provides route, frequency, dosing time, Drug Enforcement Administration (DEA) number, and notes.
	Selected Patient's Orders Listing	Lists selected patients and their order information. Includes area, patient, patient ID, discharge date and time, comments, order number, generic and brand medication name, start date, and stop date.
	Complete Pocket Listing	Lists the status of all medications in pockets. Includes drawer, pocket, generic and brand medication name, medication status (loaded or pending), minimum, maximum, and current quantity.
	Selected Pocket Listing	Lists the status of medications in selected pockets. Includes drawer, pocket, medication status (loaded or pending), generic and brand medication name, minimum, maximum, and current quantity.
	Pockets	Provides a selected or complete listing of all medications in the pockets at the station.
	Selected Formulary Listing	Lists selected medications in the facility formulary. Includes the generic and brand medication name, med ID, alternative ID, security group, class, drawer, pocket, status, maximum, minimum, and current quantity.
	All Orders By Med	Lists information about medications. Includes generic and brand medication name, med ID, medication security group and medication class. Each medication is followed by a list of all existing orders for the medication including patient name, order number, dose quantity, room, bed, order start date, order stop date, doctor name, and notes.
	Complete Kit Listing	Lists all kits created at the station or the console. Includes the kit name, kit ID, area, name of kit creator, kit medication names, med ID, medication quantities in each kit, and the number of kits at the station.
	Complete User Listing Without Detail	Lists all users at the station. Includes user name (sorted alphabetically), user ID, expiration date and time, and station privileges.
	Selected User Listing Without Detail	Lists selected users at the station. Includes user name (sorted alphabetically), user ID, expiration date and time, station privileges, and medication access privileges.
	Complete User Listing With Detail	Lists all users at the station. Includes user name (sorted alphabetically), user ID, expiration date and time, station privileges, access areas, medication access privileges, and medication override privileges.
Selected User Listing With Detail	Lists selected users at the station. Includes user name (sorted alphabetically), user ID, expiration date and time, station privileges, access areas, medication access privileges, and medication override privileges.	



<b>Category</b>	<b>Name</b>	<b>Description</b>
System (cont.)	Pocket and Med Override Groups	Lists the override group assignment for each medication and pocket, sorted by drawer and pocket. Includes station, drawer, pocket, generic and brand medication name, med ID, medication override group, and pocket override group.
	User Override Groups	Lists all users and the override groups assigned to them. Includes station, user name, user ID, and user override groups.
Override	Override Meds sorted by Patients	Lists profile override activities at the station sorted by patients. Includes patient name, patient ID, profile override activity, quantity, generic and brand medication name, med ID, drawer, pocket, date, time, user ID, and area.
	Override Meds sorted by Meds	Lists profile override activities at this station sorted by medications. Includes generic and brand medication name, med ID, quantity, activity, user, user ID, date, time, patient, and patient ID.
	Override Meds sorted by Users	Lists profile override activities at this station sorted by users. Includes user name, user ID, activity, medication quantity, and generic and brand medication name.
Clinical	Meds Due Not Removed	Tracks medications that are due but not removed.
	Meds Due Not Administered	Lists medications that were removed from the station but have not been documented as administered (sorted by user, medication, or patient).

## Recommended reports

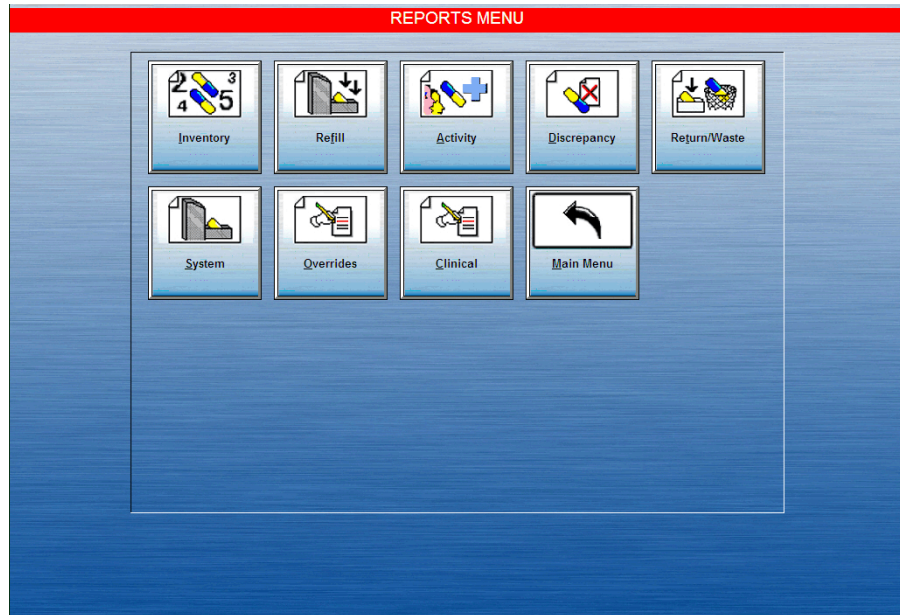
This section describes some recommended station reports and provides suggestions for how and when to use them.

Report	User	Description
Activity by Current User Report (All Transactions)	Staff nurse	Shows all transactions including withdrawals of ordered medications (charted automatically, if you have a charting interface), override medications, returns, and wastes (amount given). Consider running this report at the end of every shift to: <ul style="list-style-type: none"> <li>• Ensure that medications withdrawn by you are appropriately charted in the patient record.</li> <li>• Verify the security of your ID/password over the past 24 hours by scanning the report to confirm that transactions shown were performed only by you.</li> <li>• Verify that orders have been written for medications obtained by override.</li> <li>• Verify that medication wastes documented at the station are also recorded in the administration record.</li> </ul>
Activity by Current User (All Transactions)	Charge nurse	Consider running this report specifically for nurses temporarily practicing on the unit (that is, agency, float, or temporary staff) to assist with real-time review of medication and documentation practices. Also, use the report as a tool for monitoring practices of new nurses to ensure policy and procedure compliance.
Activity by Current User (All Transactions)	Nurse manager	Use this report to periodically review the medication practices of staff nurses as follows: <ul style="list-style-type: none"> <li>• Verify that all medications removed from the station are documented appropriately.</li> <li>• Verify that the amount given, amount wasted, and amount returned recorded at the station for controlled substances are accurately reflected.</li> <li>• Verify that orders exist or have been written for medications obtain via override.</li> <li>• Investigate medications documented on the administration record that do not show a removal from the station.</li> <li>• Review and compare the timeliness of the medication charting time on the medication-administration record with the remove time from the station.</li> </ul>
Override Meds Sorted by Patient/User	Charge nurse or unit pharmacist	Consider running these reports periodically, such as at the end of each shift. Compare the transactions on this report to the patient record to verify that override medications are being accessed, used, and charted according to policy.
Undocumented Discrepancies	Staff nurse	Run this report at the end of every shift to investigate and reconcile any discrepancies. Immediately report unresolved discrepancies to the nurse manager and pharmacy.
Inventory by Outdated Meds	Unit pharmacist	If outdate tracking is used, run this report periodically (for example, weekly) to verify that outdated medications are being monitored and removed.

## Generating reports

The following procedure explains how to run the reports.

1. In the Main Menu screen, touch **Reports Menu**.
2. In the Reports Menu, touch the button that corresponds to the type of report that you want to view.



Only those reports related to the report type you select are shown.

3. In the [name] Reports screen, select the report you want to review.



4. If an additional screen appears, select the applicable settings and then touch **View** or **Print**. For example, if you are generating an Inventory report, you may choose any of the following:
  - To create a drawer-specific report, touch the drawer on which you want a report.
  - To create a multiple-drawer report, touch two or more drawers.  
Only the selected drawers are listed in the Selections list and included in the report.
  - To deselect items, reselect the drawer in the right column.
  - To deselect all drawers, touch **Deselect All**.
5. If you chose to view the print, use the scroll bar to review the information.



# Chapter 6

## System Menu

This section includes the following topics:

<i>Station configuration</i> .....	116
<i>Station options</i> .....	119
<i>Setting up station communication options</i> .....	121
<i>Cabinet configuration</i> .....	122
<i>Brain Transplant</i> .....	127

**NOTE**

Many of the functions described in this section are performed by or with your CareFusion representative.

## Station configuration

The Station Configuration option includes various station settings such as station location, modes, and timeout settings. The station settings can be viewed or printed.

This section includes the following topics:

- *Accessing the station configuration option on page 116*
- *Calibrating the touch screen on page 117*

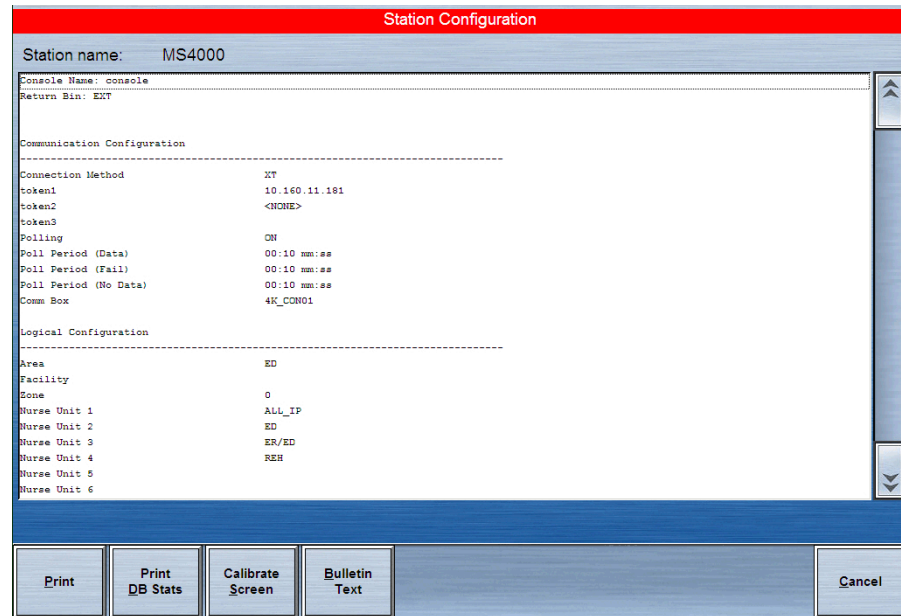
## Accessing the station configuration option

The following procedure explains how to access the list of options.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Station Configuration**.



3. In the Station Configuration screen, touch **Print DB Stats** to print a listing of the database files.



## Calibrating the touch screen

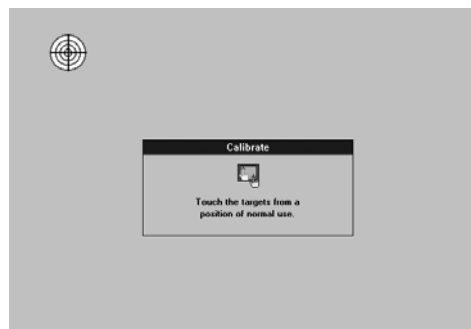
Calibrating the screen sets the cursor to the touch of your finger.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Station Configuration**.
3. In the Station Configuration screen, touch **Calibrate Screen**.

### NOTE

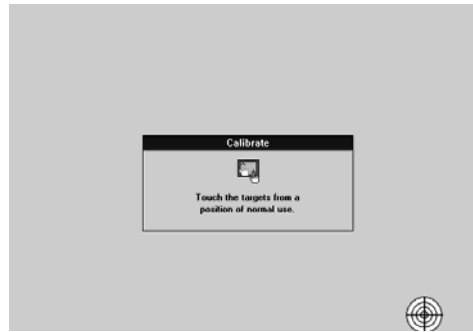
If the Calibrate screen flashes, hold down the Tab key until the screen stops flashing.

4. Touch the first target shown in a position of normal use.

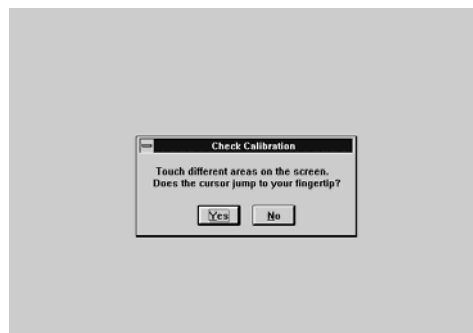




5. Touch the second target in a position of normal use.



6. When the Check Calibration message appears, test the setting by touching different areas of the screen to see if the cursor jumps to your fingertip.



- If the calibration is satisfactory, touch **Yes**.
- If the calibration is not satisfactory, touch **No** and repeat the calibration procedure.

## Station options

This section includes the following topics:

- *Configuring the station to print transaction slips automatically on page 119*
- *Enabling critical override options on page 119*

### Configuring the station to print transaction slips automatically

The following procedure explains how to use the Station Options screen to set up automatic printing of transaction slips for each function.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Station Options**.
3. In the Station Options screen, select the applicable printing slips options.

4. Touch **Save**.  
The System Menu screen reappears.

### Enabling critical override options

Use the Critical Override section of the Station Options screen to enable all users to override medication orders and access medications, including medications that cannot normally be overridden with the Override function. For example, Critical Override can be temporarily turned on if the facility network is down and station communication is interrupted.

1. In the Main Menu screen, touch **System Menu**.

2. In the System Menu screen, touch **Station Options**.  
The Station Options screen appears.
3. Do one of the following:
  - To activate the Critical Override function, touch **Enable**.
  - To activate the Critical Override function when the system goes down for a specified period of time, select **Enable when download time or delay time** and enter the delay time (the period of time that the network can be down before the critical override goes into effect).
4. Touch **Save**.

## Setting up station communication options

The station's communication parameters are usually set up by a CareFusion representative.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Station Communication**.
3. In the Station Communication Options screen, enter the following:
  - **Token 1**—Enter the parameter for the connection method or method of communication; typically the IP address of the station.
  - **Token 2**—This field is not currently used. However, it is available if you need it for a user-defined method (UA).
  - **Token 3**—This field is not currently used. However, it is available if you need it for a user-defined method (UA).
4. Enter the name of the console that the station is communicating with in the Console Name field.
5. Select the connection method or communication method from the list.
  - **RS/NS/VS**—The method for recommended standard RS-485.
  - **Fast (FA)**—High-speed direct connection.
  - **Modem (MO)**—Modem.
  - **UA**—User-configurable method customized to your network or other communication link.
  - **Network (TCP/IP)**—A network protocol (preferred).

The System Menu appears.

## Cabinet configuration

The cabinet configuration is usually set by a CareFusion representative and is used to record the serial numbers of cabinets.

This section includes the following topics:

- *Recording the serial number of a cabinet on page 122*
- *Adding a drawer on page 123*
- *Deleting a drawer on page 124*
- *Editing a drawer on page 125*
- *Editing the return bin on page 125*

### Recording the serial number of a cabinet

The following procedure explains how to record the serial numbers of the cabinets.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Cabinet Configuration**.
3. In the Cabinet Configuration screen, enter the cabinet's assigned serial number in the **Main** field.

The screenshot shows the 'Cabinet Configuration' screen with a red header. Below the header, there are two columns: 'Serial #' and 'Type'. The 'Serial #' column has eight text input fields labeled 'Main:', 'Aux 1:', 'Aux 2:', 'Aux 3:', 'Aux 4:', 'Aux 5:', 'Aux 6:', and 'Aux 7:'. The 'Type' column has eight dropdown menus, each currently set to 'None'. At the bottom of the screen, there are two buttons: 'Save' on the left and 'Cancel' on the right.

4. Select the cabinet type from the list.
5. Repeat steps 3 and 4 for each cabinet.
6. Touch **Save** to save settings and return to the System Menu.

## Adding a drawer

You can configure a station with a variety of drawers to suit demand, medications, and storage requirements. Smart drawers and other devices, such as the Remote Manager and SMART Remote Manager, are automatically configured by the system, while others require additional configuration by you.

### NOTE

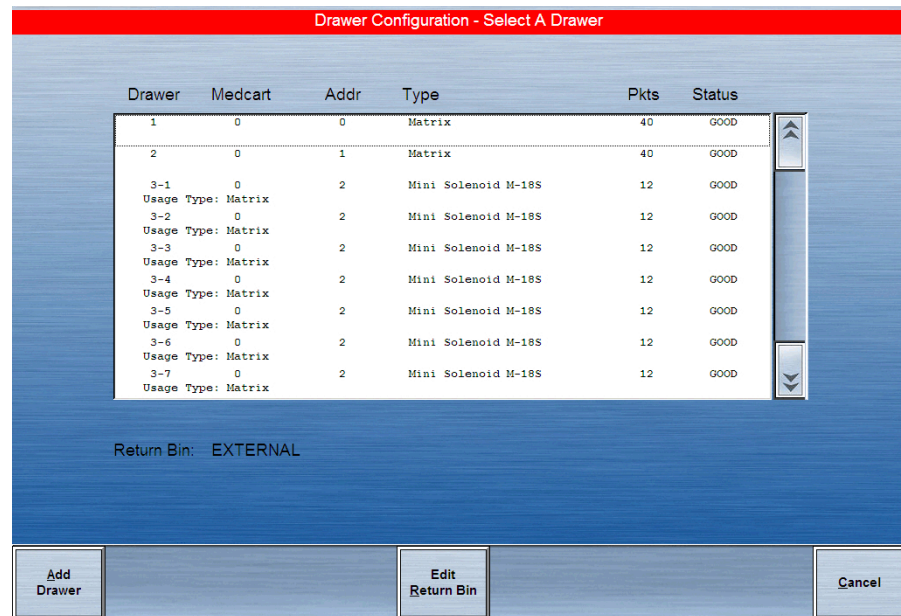
If two CUBIE pockets containing duplicate serial numbers are loaded in the same station, a warning appears on the screen. Pharmacy staff and users with Unload privileges will need to recover any failed CUBIE pocket with duplicate serial numbers and return them to the pharmacy.

### NOTE

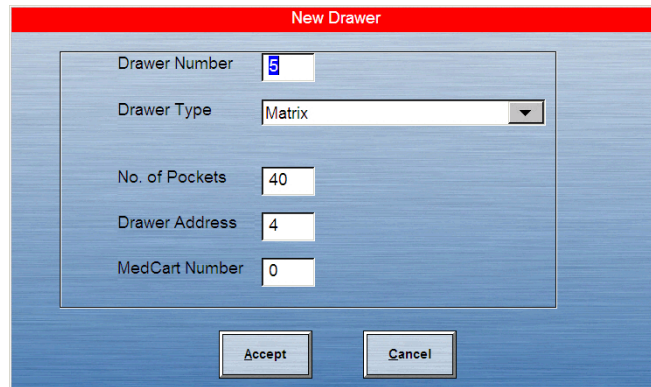
Only the facility's system manager and CareFusion representatives have the security privileges to access station configuration functions.

### To configure a non-smart drawer

1. On the Main Menu screen, touch **System Menu**.
2. On the System Menu screen, touch **Drawer Configuration**.
3. On the Drawer Configuration screen, touch **Add Drawer**.



The New Drawer screen appears.



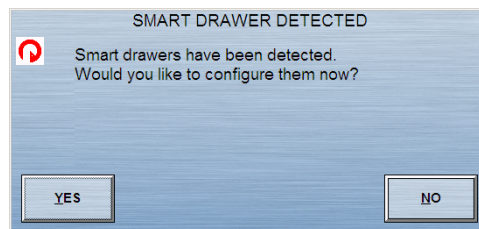
You can designate the drawer number, drawer type (such as Matrix, remote stock, and so on), number of pockets, and the drawer address.

4. Enter a Drawer Number.
5. Select a Drawer Type from the list.
6. Enter the No. of Pockets.
7. Touch **Accept**.

The new drawer appears on the Drawer Configuration list.

### To configure a smart drawer

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Drawer Configuration**.
3. When the Smart Drawer Detected screen appears, touch **YES**.



The new drawer appears on the Drawer Configuration list.

### Deleting a drawer

A drawer must be empty or unloaded to delete it.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Drawer Configuration**.
3. In the Drawer Configuration screen, select a drawer to delete.
4. Touch **Delete Drawer**.
5. When the Warning message appears, touch **YES** to confirm.
6. Touch **Accept**.

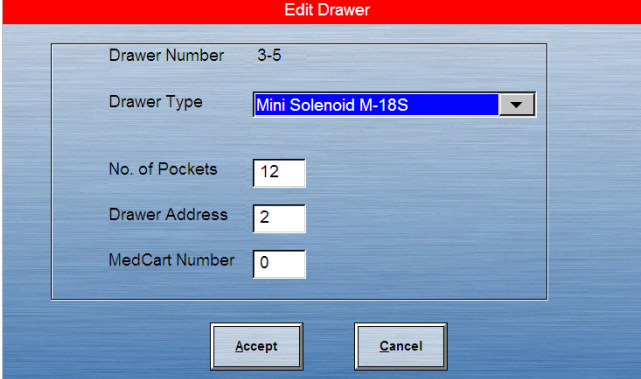
## Editing a drawer

You can edit drawer configurations to suit changing demands and storage requirements.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Drawer Configuration**.
3. In the Drawer Configuration – Select a Drawer screen, select a drawer to update.
4. Touch **Edit Drawer**.
5. In the Edit Drawer screen, update the applicable fields.

### NOTE

The value in the No. of Pockets field cannot be fewer than the last loaded pocket. You can add more pockets, but you must unload the drawer to decrease the number of pockets.



The screenshot shows the 'Edit Drawer' screen with a red header. The main content area is a light blue box containing several fields: 'Drawer Number' with the value '3-5', 'Drawer Type' with a dropdown menu showing 'Mini Solenoid M-18S', 'No. of Pockets' with the value '12', 'Drawer Address' with the value '2', and 'MedCart Number' with the value '0'. At the bottom of the screen, there are two buttons: 'Accept' and 'Cancel'.

6. Touch **Accept**.
7. In the Drawer Configuration – Select a Drawer screen, touch **Cancel** to return to the System Menu.

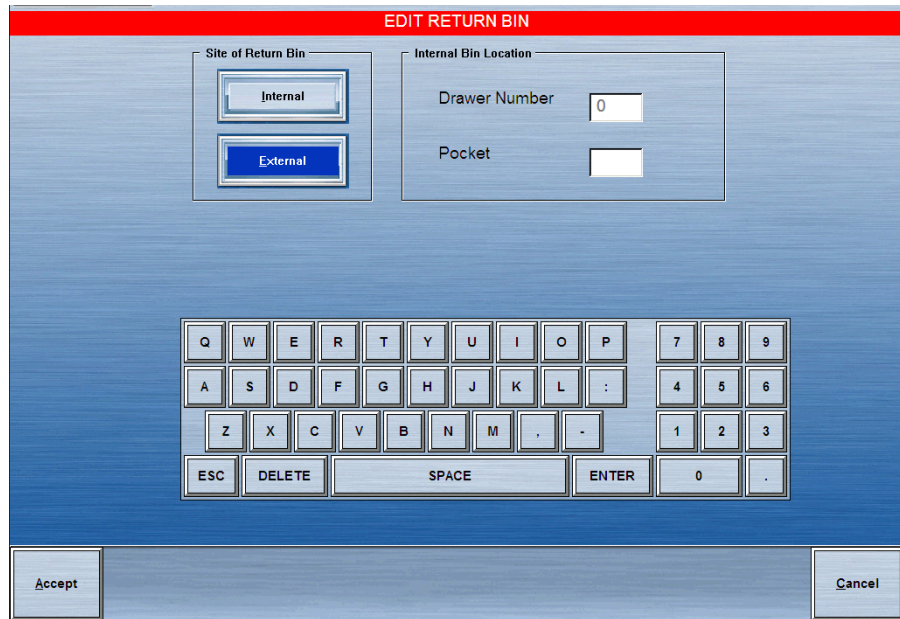
## Editing the return bin

The station can be set up with a return bin.

1. In the Main Menu screen, touch **System Menu**.
2. In the System Menu screen, touch **Drawer Configuration**.
3. In the Drawer Configuration – Select a Drawer screen, touch **Edit Return Bin**.



4. In the Edit Return Bin screen, select the site of the bin: **External** or **Internal**.



5. If you selected **External**, touch **Accept**.
  6. If you selected **Internal**, select the internal bin location information by entering the drawer number and pocket letter and touch **Accept**.
- The changes appear on the bottom of the Drawer Configurations screen.

---

# Brain Transplant

The Brain Transplant function restores a backup copy of the station's configuration and databases. The Brain Transplant function is a safe, reliable method for restoring the station's identity or repairing corrupted databases, but the process can cause unexpected results if used indiscriminately. A partial transplant may be sufficient to solve some problems.

1. Contact the TSC to request assistance.  
A CareFusion representative works with you to select the appropriate criteria to transplant files.
2. In the Main Menu screen, touch **System Menu**.
3. In the System Menu screen, touch **Brain Transplant**.
4. In the Access Verification screen, enter the security code obtained from the TSC and touch **Accept**.
5. In the Brain Transplant screen, select the options that most closely match the problem you are attempting to correct.

## NOTE

A complete brain transplant sends all records to the station and may take a long time to complete. The All Medications choice may take only a few minutes, because the medication list for a station is typically a smaller file. If the problem is corrupted medication names, try All Medications first. Selecting the Clear Tables check box on the bottom of the screen clears the station's current data before the data is transferred from the console.

6. After you touch **Brain Transplant**, you are prompted to cancel or continue and are logged off from the station.

## NOTE

The Brain Transplant icon displays until the brain transplant is complete.

The Brain Transplant options available at the station are the same as those available at the console, except that the station must remain in service. An icon is displayed at the station to alert you that a brain transplant is in progress.



# Appendix A

## Patient Alerts from Pyxis® Advisor

### Important disclaimer

Pyxis® Advisor is designed to help you recognize potential opportunities for clinical intervention through analysis of your hospitals' aggregate electronic patient data. If there are inaccuracies in the hospital electronic data, or if such data is not kept up to date and/or duly integrated with the hospital's pharmacy data, the Pyxis Advisor analysis may also be inaccurate, resulting in potential unnecessary alerts and/or NO alert when it may be warranted by a patient's actual condition.

Hospital understands that it is responsible for maintaining the contents, confidentiality and privacy of electronic patient data, including protected health information (PHI) in compliance with applicable federal and state laws and regulations, including the Health Insurance Portability and Accountability Act (HIPAA) and the Health Information Technology for Economic and Clinical Health Act (HITECH), and related rules and regulations. Any reports obtained from the Advisor that contain PHI shall be handled in compliance with HIPAA's Privacy Rule and Security rules.

Pyxis Advisor is not intended to replace professional clinical judgment. Treatment decisions should never be based strictly on information provided by the Pyxis Advisor. It is important that patients' conditions continue to be monitored and

confirmed through clinical expertise, review of a patient’s chart, medication history, laboratory results, and physical observance. Misuse of the Pyxis Advisor without the foregoing review and/or lack of clinical expertise may contribute to an adverse drug event. Only licensed healthcare providers who are authorized and trained to use the Pyxis Advisor should do so.

By noting that you agree to these conditions, you hereby assume full responsibility for ensuring the appropriate use of Pyxis Advisor.

## Using Patient Alerts from Pyxis Advisor

If configured by the facility, Pyxis Advisor receives alerts to display on the station screen.

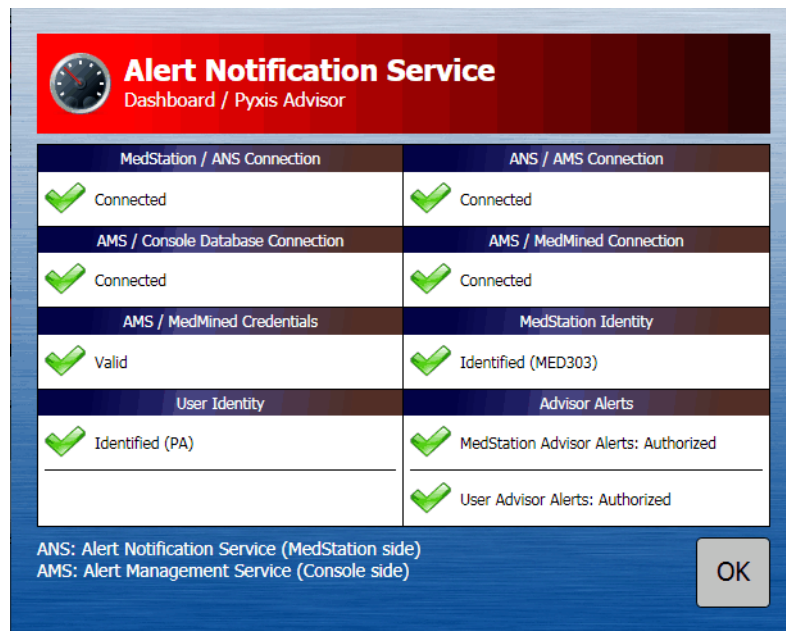
1. Access the Pyxis Advisor dashboard by pressing **Tools** in the upper left of the station splash screen.

The Tools menu appears.



2. Press **PEA Dashboard**.

The Alert Notification Service dialog box appears.

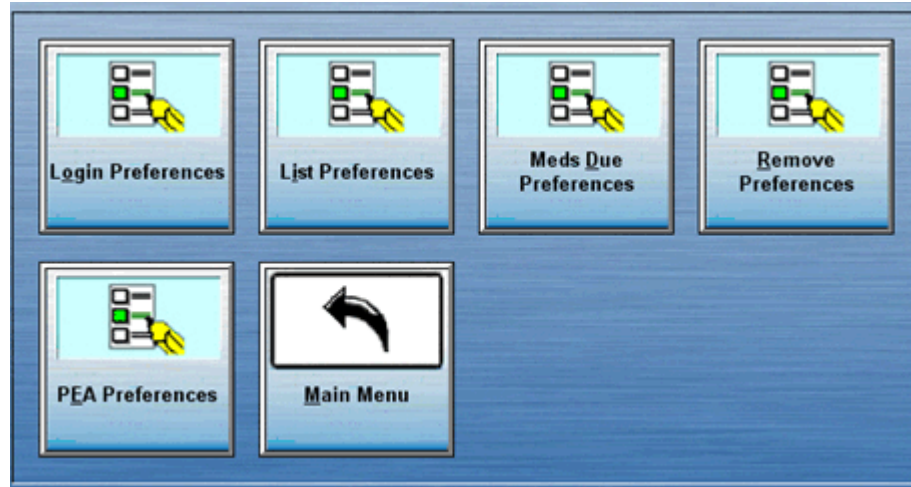


3. Press **OK** when you are done reviewing the Alert Notification Dashboard information.

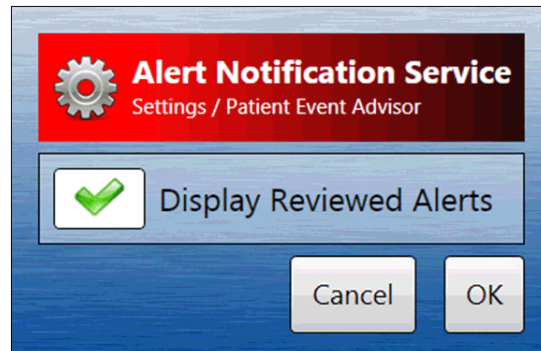
---

## To display reviewed alerts

1. Log on to the station.
2. In the main menu, select **User Menu**.



3. Click **PEA Preferences**.  
The PEA User Preferences dialog box appears.



4. Press **OK** to display reviewed alerts.

### NOTE

If you uncheck the checkmark and click **OK**, you will not see previously reviewed alerts.

5. Press **Cancel** to close the dialog box.

## Patient Alert screen

When you select a patient on the station, the Patient Alert screen appears if there are any alerts for that patient. If configured adequately, the service displays:

- Alerts that have not been reviewed.
- Alerts that have been acknowledged.

### NOTE

Pyxis Advisor alerts are configured through the Patient Event Advisor application. Through this configuration, a site can choose to send any subset of Patient Event Advisor alerts to any individual station. Reference the Patient Event Advisor user manual for instructions on configuration options.

**PATIENT ALERT**  
Patient: SALVADOR, DANNY, ID MRN168121, DOB 7/10/1964

#	Description	Reviewed
1 of 5	Title: INR = 3.9 ↓ and WARFARIN Date of Alert: 7/7/2010 5:09 AM Date of Last Lab: 7/9/2010 3:27 AM Normal Lab Range: International Normalization Ratio:0.8-1.2	<input checked="" type="checkbox"/>
2 of 5	Title: WARFARIN Date of Alert: 7/10/2010 12:12 AM Date of Last Lab: 1/1/0001 12:00 AM	<input checked="" type="checkbox"/>
3 of 5	Title: MG = 2.5 ↓ Date of Alert: 7/13/2010 2:42 PM Date of Last Lab: 7/15/2010 1:12 AM Normal Lab Range: MAGNESIUM:1.6-2.6	<input checked="" type="checkbox"/>
4 of 5	Title: PHOS = 2.3 ↓ Date of Alert: 7/16/2010 3:31 AM Date of Last Lab: 7/16/2010 3:15 AM Normal Lab Range: PHOSPHORUS:2.3-4.7	<input checked="" type="checkbox"/>
5 of 5	Title: WARFARIN Date of Alert: 7/17/2010 12:12 AM Date of Last Lab: 1/1/0001 12:00 AM	<input checked="" type="checkbox"/>

Check box after alert is reviewed.

Print Alerts OK

1. Press boxes in the Reviewed column to acknowledge that you reviewed the alert.
2. Press **Print Alerts** to get a copy of the list printed on the station printer.

### NOTE

The Lexi-Comp button is also available for searching and retrieving drug information.

3. Press **OK** to acknowledge the alerts and close the dialog box.

# Appendix B

## Pyxis® Nurse Link

For more information, see the *Pyxis® Nurse Link 1.1 Desktop User Guide*.

This appendix includes the following information on Pyxis® Nurse Link's data filtering to the station:

*Using the task list* ..... 134

### **CAUTION**

Pyxis Nurse Link supports only user ID/password logins when launching this application. 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.



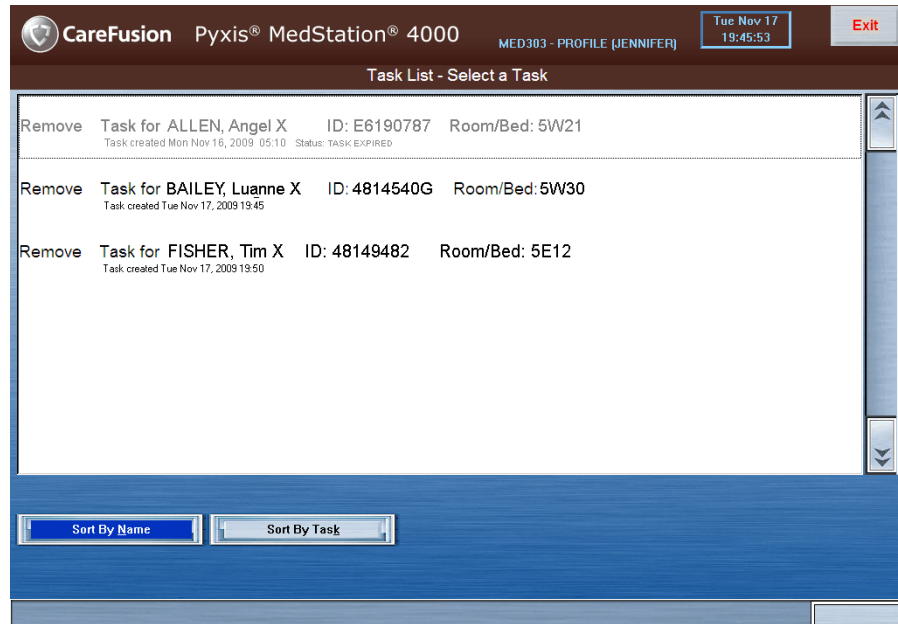
## Using the task list

If you have queued tasks, the Task List button appears on the main menu.



1. Select **Task List** to access the tasks.

Tasks are sorted by patient last name, patient first name, and by time that the task was created. You can sort this list, if needed, by selecting one of the sort buttons.



If a task is grayed-out, this indicates that the task is unavailable for one of the following reasons:

- patient discharged
  - patient unknown
  - task has expired
2. To remove medications, select an available task.

The **Task - Remove Meds for [patient name]** screen appears. For more information, see *Removing medications* on page 26 in *Patient-Care Functions*.

Task - Remove Meds for BAILEY, Luanne X

Allergies: ALLERGIES UNKNOWN CHECK PATIENT CHART

ACETAMINOPHEN W/ COD 60 mg TAB

TYLENOL #4 (GENERIC) ORDER: 12345  
 DOSE: 1 TAB PT: PRN: 061928  
 LAST: None in past 32 hour(s) NOTES:

Brand Name Generic Name

Remove Selections Task List Main Menu

If any of the queued medications are not available for removal, the **Review Task** screen appears. Medications not available for removal are grayed-out.

Review Task - Remove Meds for FISHER, Tim X

Allergies: ALLERGIES UNKNOWN CHECK PATIENT CHART

KEFLEX 250 MG Capsule  
 CEPHALEXIN 250MG ORDER: 497889445  
 DOSE: 500 MG RT: PO FREQ: Q6  
 LAST: Tue Nov 17, 2009 13:47:25 STATUS: OK NOTES:

COLASE 100 MG Capsule  
 DOCUSATE SODIUM 100MG ORDER: 4978257a  
 DOSE: 100 MG RT: PO FREQ: QD  
 LAST: Tue Nov 17, 2009 13:45:25 STATUS: OK NOTES:

PROTONIX 40 MG Tablet  
 PANTOPRAZOLE 40MG ORDER: 497889445  
 DOSE: 40 MG RT: PO FREQ: QD  
 LAST: None in past 24 hour(s) STATUS: MED NOT LOADED IN STATION NOTES:

Brand Name Generic Name

Continue Task List Main Menu

Reasons for a medication being grayed-out in the review screen include:

- order discontinued
  - out of stock
  - failed drawer
  - not loaded
  - no access
3. To obtain more information about the unavailable medication, select the grayed-out medication.

# Appendix C

## Troubleshooting

This section describes station issues that may occur and provides possible remedies. (If you think a problem is console-specific, see the section on troubleshooting in the *Pyxis® MedStation® 4000 System Console User Guide*. If you encounter an issue or remedy that is not discussed in this section, contact the TSC.) This section includes the following topics:

<i>Patient information not displayed</i> .....	139
<i>Printer does not work</i> .....	140
<i>Display screen is black</i> .....	141
<i>Keyboard is not responsive</i> .....	142
<i>Touch screen is not responsive</i> .....	143
<i>Medication not displayed on pick list</i> .....	144
<i>Wrong medication is removed</i> .....	145
<i>Drawer is closed before the medication is withdrawn</i> .....	146
<i>Temporary ID is not working</i> .....	147
<i>Temporary ID is not working</i> .....	147
<i>Emergency medication removal</i> .....	148
<i>Checking communication status</i> .....	149

*Cleaning a station* ..... 155

## Patient information not displayed

If a patient's data does not appear as expected at a station, the problem could be either a communications problem or that the patient data has not been received through the interface from the host system. Occasionally, there is a high level of data traffic within the system and it can take several minutes for the data to arrive at its final destination. If the patient's data still has not appeared after a few minutes, consider the following questions and possibilities:

1. Was the patient recently admitted to the facility or transferred to this unit from within the facility? If so, the patient's data may appear momentarily.
2. Is the patient in the admission system? Check the terminal at the nurses' station and have pharmacy check for the patient at the console.
3. There could be a communications problem between the ADT system and the console. Provided that you have the privilege to do so, manually enter the patient data into the station with the Add Patient button at the Remove Meds - Select A Patient screen. If more than one patient in the admissions system does not arrive at the station, contact the CareFusion system manager.
4. There could be a communications interface problem between the console and the station. Check the Comm Status screen on the station. If the column labeled L shows a value other than 0, there may be a communications problem between the console and the station. Contact the TSC for assistance.
5. The Areas table may not be set up correctly.

## Printer does not work

If the station printer stops working, check the following:

1. Is the printer out of paper? Lift the paper cover on the top of the station and see if there is paper. If not, place paper in the printer.

### NOTE

The directions for replacing printer paper are under the printer cover. More detailed information can be found in the product-specific user guide.

2. Is the black lever on the printer pushed back (away from you)? If it is in this position, the printer will not function. Pull the lever back down and toward yourself.
3. Was the paper just changed? If so, it could be improperly installed. Feed paper from under the roll. Reinstall the paper.
4. Does the Paper Advance button (right side of the station, just to the left of the printer) cause the paper to advance when pushed? If the paper advance button still functions, the problem may be with the way the paper was loaded. Remove the paper and reinsert it into the upper slot.
5. If the Paper Advance button does not cause the paper to advance, the printer has probably shut itself down. You need to reset the printer.
  - a. Move the black lever on the printer forward and backward (the paper should “jog” up a little when the lever is pushed back).
  - b. Try to rerun the report. If the report does not print, remove the paper and reload it. Doing this resets the printer.
6. If the printer still does not work, do the following:
  - Have the system manager shut down the station by touching the **System Menu** button.
  - When the System Menu appears, touch the **Shut Down** button to shut the station down.
  - Turn the power switch (located on the right rear of the station) to the off position and wait at least one minute before plugging it in again.
  - Try to print the report again—if this does not work, contact the TSC.

## Display screen is black

1. If the station LCD is black, check to see if the station is plugged into the wall socket.
2. Touch the screen on the station and listen for a key click. If there is no click, the station may not have properly started after a power failure or some other cause.
3. If the screen remains black, turn the power switch (located on the right rear of the station) to the off position and wait at least one minute before switching it on.
4. If none of these work, contact the TSC.



## Keyboard is not responsive

Sometimes the station keyboard seems unresponsive because the computer is processing another transaction. Wait a few moments and try again. The system station is fully functional through the touch screen. If the keyboard fails, the system will still function properly in all other aspects, until the keyboard is repaired.

1. If the keyboard remains unresponsive, turn the power switch (located on the right rear of the station) to the off position and wait at least one minute before switching it on. Try to type on the keyboard again—if this does not work, contact the TSC.
2. Do any characters appear in the ID field at the standby screen? If so, press **Delete** to remove the characters and enter your ID and password.
3. Is the time on the clock changing? If it is not, the station is down. Contact the TSC.
4. If you are at a screen other than the standby screen, wait a few minutes to see if the station times out and returns to the standby screen. If it does not time out, contact the TSC.

### **NOTE**

Always call the TSC after troubleshooting so that CareFusion can record the potential problem in a database.

## Touch screen is not responsive

Sometimes the station touch screen may seem unresponsive because the computer is processing another transaction. Wait a few moments and try again. The station is fully functional through the keyboard with hot keys for the screen. If the touchscreen fails, the system will still function properly in all other aspects, until the touch screen is repaired.

1. If you are at the standby screen, touch the screen and listen for the beep the screen makes when active. If there is no beep, the station could be down. Contact the TSC.
2. Is the time on the clock changing? If it is not, the station is down. Contact the TSC.
3. If the touch screen remains unresponsive, turn the power switch (located on the right rear of the station) to the off position and wait at least three minutes before switching it on. Touch the screen again. If this does not work, contact the TSC.
4. If you are at a screen other than the standby screen, wait a few minutes to see if the station times out and returns to the standby screen. If it does not time out, contact the TSC.

## Medication not displayed on pick list

If a medication does not show on a pick list, it is possible the medication was either not loaded or was unloaded from the station.

1. Determine if you have the correct access privileges (security group and/or override group) for the medication.
2. View or print out an Inventory report to see if the medication is loaded.
3. Because the medications are loaded with both the brand and generic names, touch the alternate option from the Remove Med screen and search for the medication.
4. View or print out an Activities report that shows all transactions for that particular medication.

This report shows all the activities for the medication, including whether it was unloaded and by whom. If you suspect that the medication was unloaded more than 32 hours prior, you must contact the system manager for this report. If it is necessary to reload the medication, contact the pharmacy.

## Wrong medication is removed

If you remove the wrong medication for a patient, do the following:

1. Touch the **Return Med** button to return the medication to the station. The patient is credited for the medication.
2. Touch **Remove Med** to access the correct medication for the patient.

## **Drawer is closed before the medication is withdrawn**

If you inadvertently close the drawer before removing the medication, repeat the Remove process making sure to select the same patient, medication, and quantity.

When the drawer opens, remove the same quantity of medication that you indicated on the previous selection.

### **NOTE**

Inventory the medication to ensure that the system count of the pocket quantity is accurate.

## Temporary ID is not working

If a temporary user ID and password fail to gain access to the station, determine if the password has been changed and do the following:

1. The first time a temporary user ID is used, the station requires you to enter a new password. Make sure the new password is being used.
2. The original creation of the temporary ID and password may have failed if the station was out of paper. If that is the case, you must create a new temporary ID and password. (Check that the station has paper.)
3. If the new password has been forgotten, issue a new temporary user ID.
4. If a new password has not been issued, contact the System Manager to set up the user from the console, and contact the TSC.

## Emergency medication removal

If a catastrophic power failure occurs, an internal battery backup at the station provides about two minutes of power to automatically initiate a safe shutdown of the station. If the power failure continues, you can gain access to the medications through the following override process:

1. Consult the facility policy on emergency access to stations during a power failure. If appropriate, go on to step 2.
2. Turn off power to the station by switching the power switch (located on the right rear of the station) to the off position.
3. Obtain the two keys (from pharmacy personnel) required to remove the access panel from the back of the station.
4. Remove the back access panel.
5. Press the red release lever on the right side of the appropriate drawer and push the drawer out.
6. Repeat for each drawer that you need to access.
7. Using the log sheet provided, record any medication removals according to your facility's procedures.
8. When power returns, close all drawers and contact the system manager for instructions on bringing the station current with the medications you removed during the outage.

## Checking communication status

If there is an interruption in the communication between the station and the console, the Comm Status alert icon appears on the bottom left side of the Main Menu screen. This alert is more critical in the profile mode, as it indicates that orders may not be up to date.

If this icon appears for more than a few minutes, it may be appropriate to call the system manager.

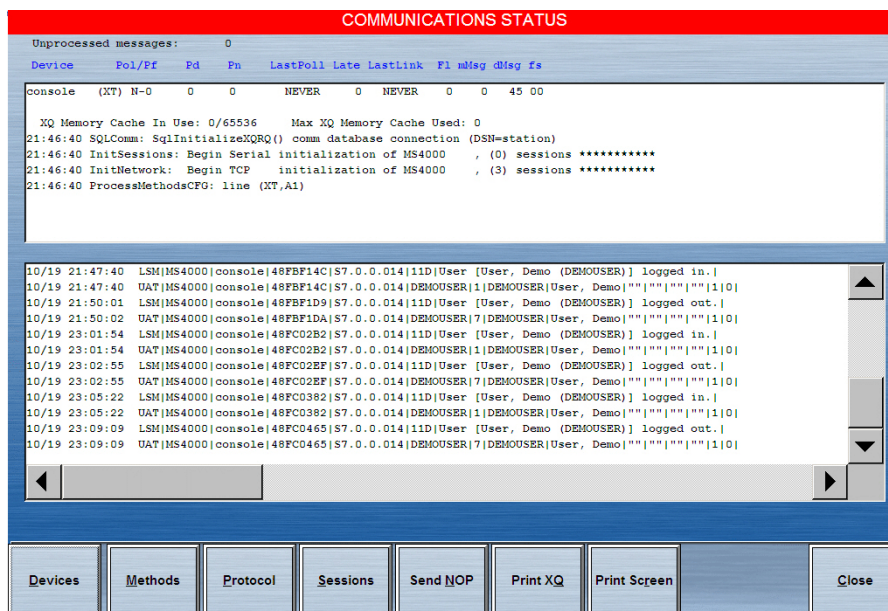
Advanced users may want to touch the Comm Status button to get more details about the communication problem.

### NOTE

You cannot fix any issues on these screens. The screens are shown only for support.

### To check the communication status

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status** to check the status of communication between the station and the console.



3. In the Communications Status screen, verify whether the console is communicating with the station.

The following list describes each column on the screen:

- **Device**—The device name and the communications method (in parenthesis). A device is any piece of equipment that communicates directly with the station, such as the console.



- **Pol/Pf**—Indicates whether the device is set up to poll another device (**Pol**: **Y** for yes, **N** for no). **Pf** indicates the time to wait, in seconds, before polling again after a failure to link.
- **Pd**—Indicates how many seconds to wait before polling again after data has been sent or received.
- **Pn**—Indicates the time to wait, in seconds, before polling again after no data has been sent or received.
- **LastPoll**—The date and time that the device was last polled or questioned by the console. When the station is communicating successfully, the LastPoll and LastLink indicates the same time.
- **Late**—The number of seconds the last poll was late. For example, if polling was set for 20 seconds and instead took 30 seconds, the poll was 10 seconds late.
- **LastLink**—The date and time that the device was last successfully linked with the station.
- **F1 (FCNT)**—The failure count: Indicates number of successive times that communications failed between the device and the station. A high count indicates something more than an occasional or incidental communications failure and requires your immediate attention. 0 indicates successful communication.
- **mMsg**—The Memory Message Queue: Indicates the number of messages that the station has in memory for transmission to the console. This number normally decreases with each successful poll of the device.
- **dMsg**—The Disk Message Queue: Indicates the number of messages that the station has temporarily stored on disk for transmission to the device. This number is normally zero, but it may increment if overall traffic is heavy and memory becomes low or if the stations are offline. When memory becomes available, the dMsg figure should quickly drop to zero as the messages are again queued in memory.
- **fs**—The Finished/Failed Status: Indicates the finished or failed status of the communication attempt. Some of the codes that may appear under this column include:
  - **OK**—Device/Console communicated
  - **HT**—Hello Time-out

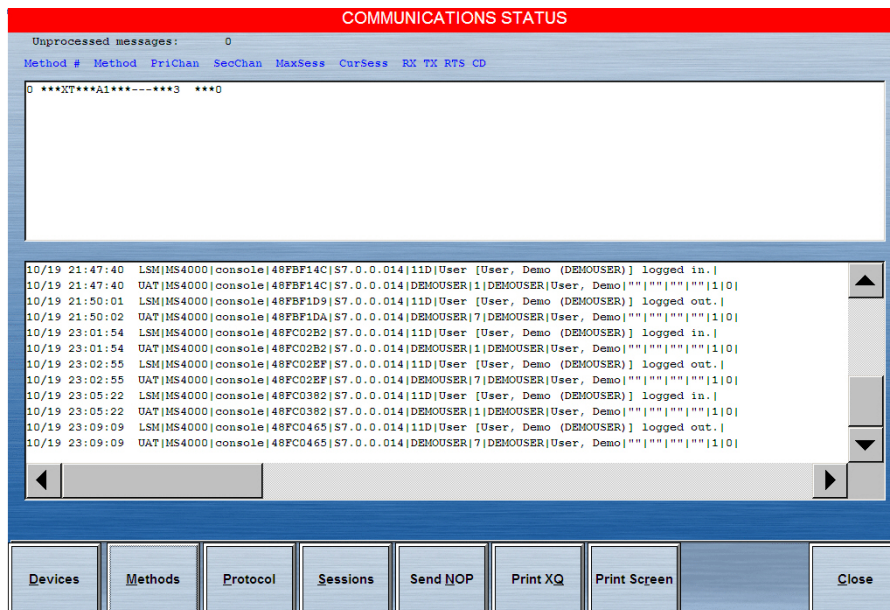
### Check method status

The Method Status screen displays the current methods in use. If a method supports multiple sessions, it shows which session is active.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status**.

3. In the Communications Status screen, touch **Methods**.

The screen displays the method information.



The following list describes each column on the screen:

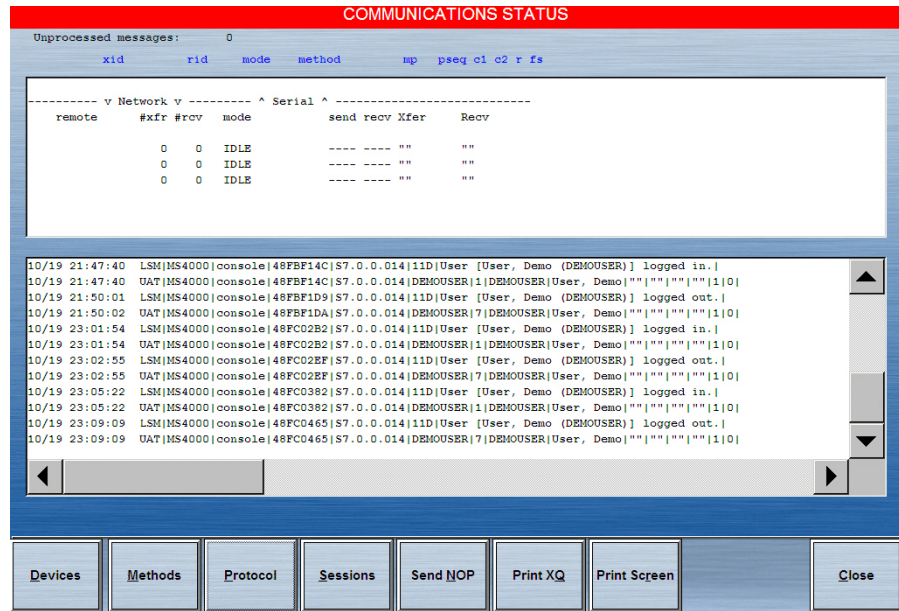
- **Method #**—The method number referenced from the Communications Protocol Status and Comm Session Status screens.
- **Method**—The type of connection being used for communication.
- **PriChan/SecChan**—The primary and secondary channels for communications for this method, such as a communications (COM) port.
- **MaxSess/CurSess**—The maximum number of sessions allowed for this method and the current active session.
- **RX**—Corresponds to the light on the modem and signifies receiving data.
- **TX**—Corresponds to the light on the modem and signifies transmitting data.
- **RTS**—Corresponds to the light on the modem and signifies requesting to send.
- **CD**—Corresponds to the light on the modem and signifies carrier detection.

### Check protocol status

A protocol is a formalized sequence of steps ensuring that communication is properly established, messages are exchanged in an orderly fashion, and communication is properly ended. The Communications Status screen shows the progression through the communications protocol between the device and the console.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status**.

3. Touch **Protocol**.



The following are descriptions of each column on the screen:

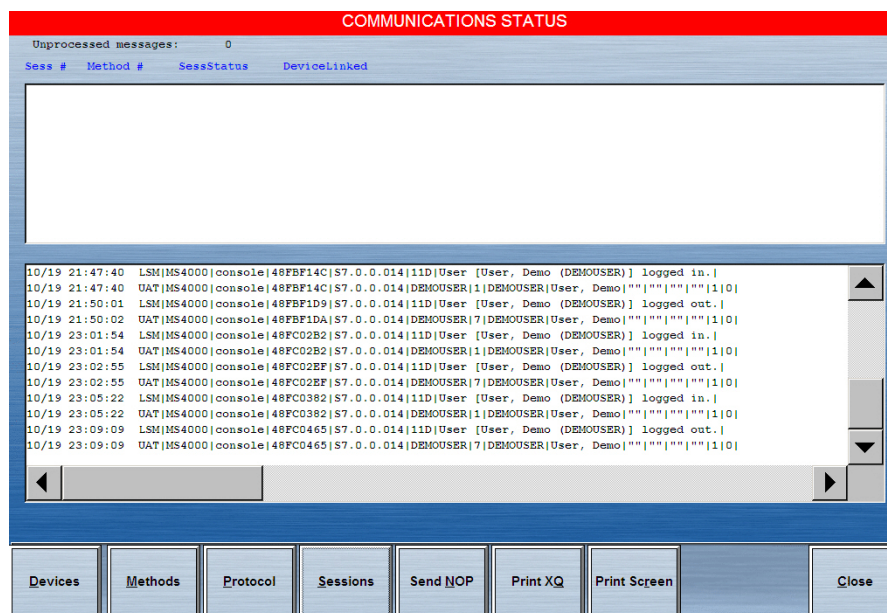
- **xid**—The name of the polled device. This is blank unless communication is in process.
- **rid**—The name of the device doing the polling. This is blank unless communication is in process.
- **mode**—The current step in the protocol.
- **method**—The method used corresponds to the Method # in the Comm Methods Status screen.
- **mp**—The first few characters of the message being sent.
- **pseq**—The packet sequence, the number of messages transmitted during this session.
- **c1/c2**—The transmission retry counters, which increment when a message packet is received with an apparent error.
- **r**—The direction of transmission: a **t** indicates communications to the polled device (not yet reversed) and an **f** indicates communications from the device.
- **fs**—The finished status: Indicates how the communication session between the station and the device listed in the **Device** field ended.

**Check sessions status**

A session is the entire communications transaction, from being idle to initial poll through the acknowledgment and protocol, transmissions of messages, and end.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status**.

3. Touch **Sessions**.



The following list describes each column on the screen:

- **Sess #**—The session number.
- **Method #**—The method number being used and, in parenthesis, the method type. This corresponds to the Method # in the Comm Methods Status screen.
- **SessStatus**—The current stage in the session for this device.
- **Device Linked**—The name of the linked device.

**Send No Operation (NOP)**

The following procedure explains how to test the disk-message queue.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status**.
3. In the Communications Status screen, touch **Send NOP**.

**NOTE**

Touching the button sends a message and is helpful in validating communications for a new station. When communications are working properly, touching this button increments values in the dMsg column.

## Print transaction queue (XQ)

The following procedure explains how to print Communications Status data.

1. In the upper-left corner of the screen, touch the CareFusion logo.
2. Touch **Comm Status**.
3. In the Communications Status screen, touch **Print XQ**.

### **NOTE**

The report lists messages waiting to be sent to the console.

## Cleaning a station

When needed, clean the unit with a damp cloth.

**CAUTION**

Do not allow liquid to seep into any openings or seams. A nonabrasive cleanser can be used sparingly. Be sure to rinse off any residue with a clean, damp cloth.

The same cautions apply to drawer interiors:

**CAUTION**

Clean the drawers with a damp cloth. Do not leave behind a wet surface where dust may accumulate.

**CAUTION**

Do not use alcohol to clean clear plastic components.



# 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.

## **Assign and Load**

The process of assigning and loading a medication to a station at the station, without first pending the medication at the console.

## **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 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.

## **BioID**

A feature that confirms a users' identity by checking 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 may 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.

### **Document Discrepancy**

A feature that appears as a button on the Main Menu screen when there is a discrepancy to document.

### **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 may be defined as equivalent to one 80 mg furosemide tablet.

**External Return Bin**

A return bin located externally to the station where returns are placed when prompted by the station.

**Formulary**

A database of all pharmaceuticals used by the facility in the 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.

**Interface**

Refers to the translation of information from a facility's computer system to the MedStation system. Information obtained through the interface includes patient admissions, discharges, transfers, billing data, and pharmacy profile.

**Internal Return Bin**

A return bin located in a drawer of the station. Returns and wastes are placed here when prompted by the station.

**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.

### **Lexi-Comp**

Available under the CareFusion logo at the station, Lexi-Comp is a feature used to search and cross-reference brand and generic named medications.

### **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 at the 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.

### **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 facility pharmacy profile system and appear at the appropriate station the start time.

**Outdate**

The process of removing expired medications from the station.

**Override**

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.

**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 MedStation system.

**Profile Option (Profile Mode)**

The Profile option is available on the 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 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 MedStation must have one of 10 security groups associated with it. The security group is a tool 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 MedStation.

**System Manager**

A nurse or pharmacist who has attended a comprehensive training class offered by CareFusion and is responsible for configuring the 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.

### 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 may 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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