



Ascribe Pharmacy System

User Guide

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Introduction

The Ascribe RX® Pharmacy System is the central system for canister, facility management, and pharmacy management activities. The Ascribe RX® Pharmacy System (OPS) provides you with the capability to initialize canister chips, fill and ship canisters, maintain users, and customize the Ascribe RX® Dispensing System by facility. This guide contains step-by-step setup processing instructions for the Ascribe RX® Pharmacy System.

Terminology

Below is a list of terms used throughout this guide and in the system Help.

- **Activity:** A task that is performed on a regular basis such as filling and shipping canisters. Activity tasks are located under the Can Mgmt and Pharmacy menus.
- **Record:** A component of data. For example, a facility name, address, and phone number create a “facility record.” Records are located under the Records menu.

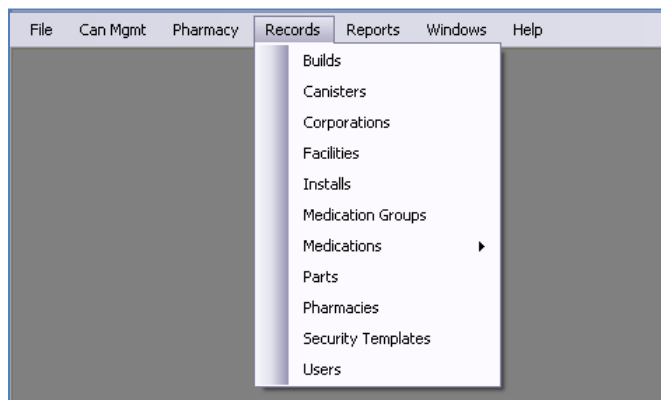
Navigation

There are two ways to navigate the system: menus and hot keys.

- **Menus** are located across the top of the system and include but are not limited to: File, Can Mgmt, Pharmacy, Records, and Help. Menus are organized by the type of task performed. For example, options under the **Can Mgmt** menu include daily, multiple step tasks (e.g. fill canisters, ship canisters) and options under the **File** menu include general, rarely used tasks (e.g. change password). See **Figure 1** below.
- **Hot keys** are pre-defined keystrokes that open and close screens, save changes, and execute actions.

To cancel a process or close a screen, click the **Cancel** or **Close** button, whichever is displayed on the screen.

Figure 1: Records menu



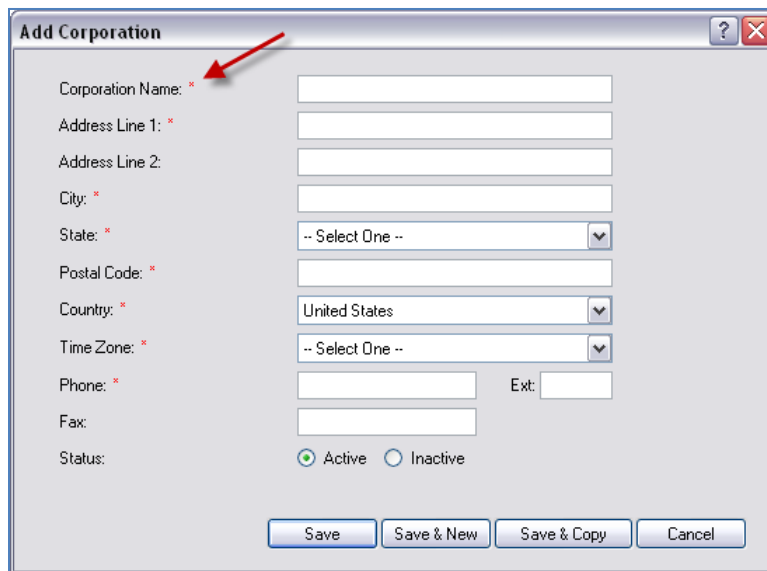
Hot keys

A handful of hot keys are available for use throughout the system. Hot keys are identified by an underlined character. Press the Alt key to prompt the system to display underlined characters. For example, File. After the underlined characters are displayed, simply press the underlined letter of the desired option and the screen for that option will open.

Required fields

A red asterisk (*) displays next to each field that is required in the system.

Figure 2: Add Corporation screen



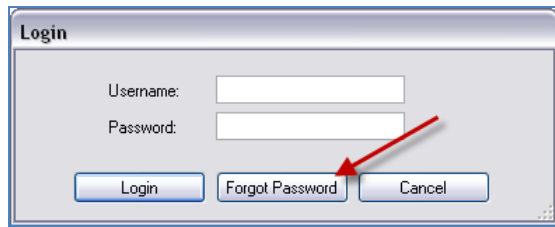
Resetting a forgotten password

You can reset your password from the OPS **Login** screen by clicking **Forgot Password**. See **Figure 3** below.

To re-set your password:

1. From the **File** menu, select **Login**.
The **Login** screen appears.
2. Click the **Forgot Password** button.
3. Enter your username and click **Submit**.
4. Answer your security question and click **Submit**.
5. Enter and confirm your new password and click **Submit**.
6. Log into OPS using your new password.

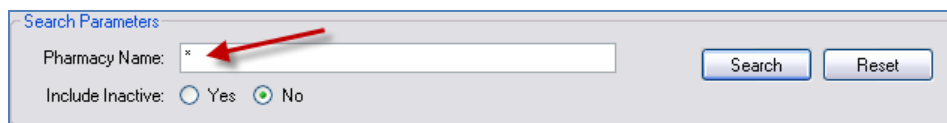
Figure 3: Login screen

A screenshot of a 'Login' dialog box. It contains two text input fields labeled 'Username:' and 'Password:'. Below these fields are three buttons: 'Login', 'Forgot Password', and 'Cancel'. A red arrow points to the 'Forgot Password' button.

Wildcard functionality

The asterisk symbol functions as a wildcard when searching records. For example, when searching pharmacies, you can enter * in the **Pharmacy Name** field and all pharmacies you have access to will display.

Figure 4: Pharmacies search

A screenshot of a 'Search Parameters' dialog box. It features a text input field labeled 'Pharmacy Name:' containing an asterisk (*). A red arrow points to this asterisk. Below the input field are two radio buttons labeled 'Include Inactive:' with options 'Yes' and 'No'. The 'No' option is selected. To the right of the input field are two buttons: 'Search' and 'Reset'.

Note: If you enter a character in addition to the asterisk, the system will search for an exact match to what was entered. For example, if you enter Gra*, the system searches for a pharmacy name of "Gra*" which likely does not exist. The asterisk must be used by itself in order for it to function as a wildcard.

File Menu

The **File** menu serves as a location where general tasks are executed like changing a password, accessing the ORC, and logging out.

Accessing the OnSiteRx® Resource Center

You can access the the OnSiteRx® Resource Center login page, by selecting **Access ORC** from the **File** menu. Or you can access the ORC manually by typing <https://orc.onsiterx.net> as the URL in your browser.

Changing your password

You can change your password at any time by selecting **Change Password** from the **File** menu. You will be prompted to enter your current password and enter and confirm your new password. Your new password must meet the following password requirements:

- Passwords must be at least six characters long but no more than twelve characters.
- Passwords must contain at least one number and one letter.
- Passwords cannot contain the OPS/ORC username or ODS/MAR username.

Note: The new password is applied to the OnSiteRx® Dispensing System, OnSiteRx® Pharmacy System, and OnSiteRx® Resource Center immediately.

To change your password:

1. From the **File** menu, select **Change Password**.
The **Change Password** screen appears.
2. Enter your current password.
3. Enter your new password.
4. Confirm your new password.
5. Click **Save** to complete the change password process.

Figure 5: Change Password screen

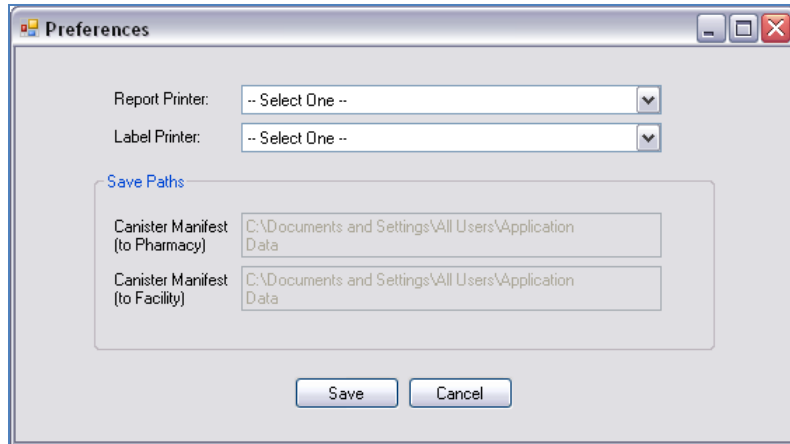


The screenshot shows a 'Change Password' dialog box with a title bar. Inside, there are three text input fields labeled 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

Preferences

You can change the default report and label printers at any time by selecting **Preferences** from the **File** menu. The following fields display on the **Preferences** screen.

Figure 6: Preference screen



Note: Required fields appear in **bold, black** text.

- **Report Printer:** Select an option from the drop-down list. The system will use the default printer for the workstation if a report printer is not selected.
- **Label Printer:** Select an option from the drop-down list.
- **Canister Manifest (to Pharmacy):** This is a read-only field based on the entry made in Records > Pharmacies and is not editable through Preferences.
- **Canister Manifest (to Facility):** This is a read-only value field on the entry made in Records > Pharmacies and is not editable through Preferences.

Login

You can log into the system by selecting **Login** from the **File** menu. The **Login** option will be disabled if a user is currently logged into the system on that workstation.

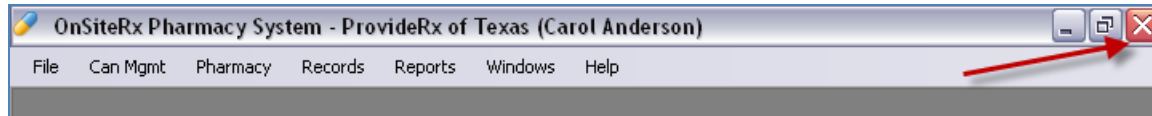
Logout

You can log out of the system by selecting **Log Out** from the **File** menu. Upon confirming you want to log out of system, the **Login** screen will display.

Exit

You can log out and close the system by selecting **Exit** from the **File** menu or by clicking the “X” in the upper right-hand corner. All screens must be closed prior to exiting the system.

Figure 7: Exit system functionality



Can Mgmt & Pharmacy Menu Overview

Options available under the **Can Mgmt** and **Pharmacy** menus are referred to in general terms as “activities.” Activities are repetitive, process-driven tasks that are performed throughout the day. For example, you assembled ten new canisters and need to initialize them or you need to fill eight canisters with medication for a facility.

The **Can Mgmt** and **Pharmacy** menu options are listed in order of the canister lifecycle by competency (e.g. shipped to a pharmacy, received at the pharmacy, and filled with medication).

The canister lifecycle contains many different canister states. A canister will only be assigned one canister state at a time; however, will be assigned hundreds of different states throughout its life. The tables on the following pages summarize the canister states that the canisters will be updated to after performing the activity.

OPS canister states

OPS Menu	Option/Activity	Outgoing Canister State
Can Mgmt	Create Build Labels	Label Printed
Can Mgmt	Initialize Canisters	Label Printed (after the label is printed) Prepared (after chip is written)
Can Mgmt	Ship to Pharmacy	Sent to Pharmacy
Pharmacy	Receive Canisters	Reclamation
Pharmacy	Reclaim Canisters	Empty at Pharmacy
Pharmacy	Fill Canisters	Chip Written at Pharmacy (after chip is written) Filled at Pharmacy (after the label is scanned)
Pharmacy	Ship to Facility	Sent to Facility
Pharmacy	Reclaim Medications	No change to canister state.
Pharmacy	Reinitialize Canisters	Empty at Pharmacy
Pharmacy	Destroy Canisters	Destroyed

ODS canister states

ODS Menu	Option/Activity	Outgoing Canister State
Manage Canisters	Receive Canisters	In Storage
Manage Canisters	Return Canisters	Sent to Pharmacy
N/A	Take a canister out of storage and put it into the packager	In Packager
N/A	Take a canister out of the packager and put it into storage	In Storage

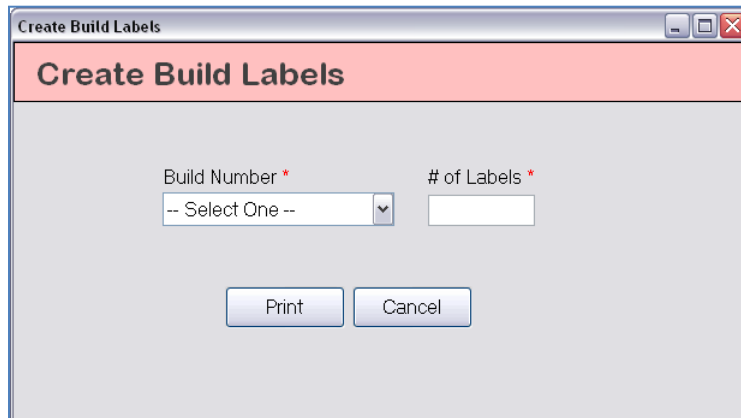
Can Mgmt Menu

The **Can Mgmt** menu includes all activities related to the maintenance of canisters.

Creating build labels

The **Create Build Labels** activity provides you with the ability to print multiple labels for a specified build number.

Figure 8: Create Build Labels screen



Note: Required fields appear in **bold, black** text.

- **Build Number:** Select an option from the drop-down list or enter the build number.
- **# of Labels:** Enter the quantity of labels to print (maximum of 50).

Click **Print** to print the build labels or **Cancel** to cancel the action.

Upon completion of printing, you will be prompted to confirm if the print run was successful. Select from one of the options below.

- **Yes:** All labels printed successfully.
- **No:** At least one of the build labels failed to print successfully and you want to re-print the batch.
- **Cancel:** At least one of the labels failed to print successfully and you do not want to re-print the batch.

Note: You cannot use any successfully printed build labels if you select **No** or **Cancel** on the print confirmation screen. Therefore, if you print a batch of 20 labels and only 10 print, it is required that you discard the 10 successfully printed labels immediately and click **No** to print all 20 labels again or **Cancel** to cancel the print altogether.

Initializing canisters

Initializing a canister chip is a multiple step process that differs based on whether the canister has a build label or not.

Step 1: Register the build number

If the canister you want to initialize has a build label affixed, place the canister on the chip writer. The system will auto-advance you to step 3 after the canister is placed on the chip writer.

If the canister does not have a build label, enter or select the build number from the **Build Number** drop-down and click **Print Label**. The system will auto-advance you to the next step upon completion of printing.

Figure 9: Initialize Canisters register build number screen

Initialize Canisters

1 Register the build number 2 Affix label/put on writer 3 Scan the build label 4 Remove the canister

Select a build number to print the build label and initialize the chip or place the canister on the chip writer if the canister already has a build label and only needs the chip to be initialized.

Build Number

Print Label Cancel

Step 2: Affix the label and put it on the chip writer

If a label was printed, affix it to the canister and place the canister on the chip writer.

Step 3: Scan the build label

Scan the build label of canister on the chip writer. The system will initialize the canister chip with the information on the build label.

Note: If you cancel the action, the canister cannot be used until it is successfully initialized.

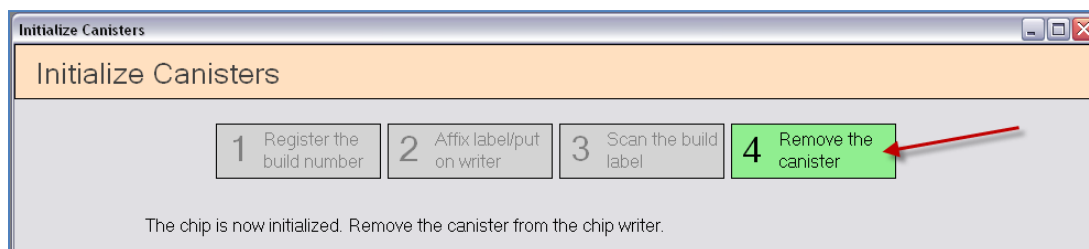
Figure 10: Build label example



Step 4: Remove the canister from the chip writer

Remove the canister from the chip writer when the workflow box for step 4 is illuminated in green. Place the canister in inventory or ship it to a pharmacy. The system will auto-advance you to step 1 to initialize another canister. Click **Cancel** on step 1 if you are finished initializing canisters.

Figure 11: Initialize Canisters remove the canister screen



To ship canisters to a pharmacy: Select **Ship to Pharmacy** from the **Can Mgmt** menu.

Shipping canisters to a pharmacy

Shipping canisters to a pharmacy is a two-step process where you select the pharmacy and scan the canisters.

Step 1: Select the pharmacy

Note: Required fields appear in **bold, black text**.

- **Pharmacy Name:** Select an option from the drop-down list. See **Figure 12** below.

The system will populate the address, phone, and fax fields; verify this information is accurate. Click **Next** to advance to the next step.

Figure 12: Ship Canisters to Pharmacy select pharmacy screen

The screenshot shows a window titled 'Ship Canisters to Pharmacy'. It has a yellow header bar with the title. Below the header, there are two numbered steps in boxes: 1. Select the pharmacy and 2. Scan the canisters. Step 1 is the active step. Below the steps, a message says: 'Select the pharmacy to ship canisters to and click Next.' The form contains several fields: 'Pharmacy Name' with a dropdown menu showing 'ProvideRx of Texas', 'Address 1' with '1200 Texas Trail', 'Address 2' (empty), 'City' with 'Grapevine', 'State' with 'TX', 'Postal Code' with '76534', 'Phone' with '814-785-8566', and 'Fax' with '814-785-8590'. At the bottom, there are two buttons: 'Next >>' and 'Cancel'.

Step 2: Scan the canisters

Scan the build label of the canisters you need to ship to the pharmacy. The screen will refresh and display canister information each time a canister is scanned.

To remove a canister scanned in error: Highlight the canister and click **Delete**.

Figure 13: Ship Canisters to Pharmacy scan canisters screen

Ship Canisters to Pharmacy

1 Select the pharmacy 2 Scan the canisters

Scan the build labels of the canisters you want to ship to the pharmacy and click Print & New or Print & Finish.

Pharmacy: **ProvideRx of Texas**

Build Number	Canister ID
1001	102017820779
1002	102017823472

Delete

Print & New Print & Finish Cancel

Finalize the ship to pharmacy process using one of the print options listed below.

- Click **Print & New** to print the canister shipping manifest and auto-advance to step 1 to create a new shipment.
- Click **Print & Finish** to print the canister shipping manifest and auto-close the **Ship Canisters to Pharmacy** screen.

Note: Upon clicking **Print & New** or **Print & Finish**, you will be prompted to view the canister shipping manifest report on-screen. Viewing the canister shipping manifest is optional as the system automatically prints the report upon clicking **Print & New** or **Print & Finish**.

Note: A copy of the report will be saved in the save path directory defined in *Records > Pharmacies*.

Destroying canisters

Destroying canisters is a two-step process where you register the canister and then verify and destroy the canister.

Step 1: Register the canister

There are three ways to register the canister: (1) scan the build label, (2) enter the canister ID manually, or (3) place the canister on the chip writer. See **Figure 14** below.

- If you scan the build label of the canister or place the canister on the chip writer, the system will auto-advance you to the next step.
- If you enter the canister ID manually, you are required to click **Next** to advance to the next step.

Figure 14: Destroy Canisters register canister screen

The screenshot shows a window titled "Destroy Canisters" with a green header bar. Below the header, there are two buttons: "1 Register the canister" and "2 Verify the canister". The "1 Register the canister" button is highlighted. Below these buttons, the text reads: "Scan the build label, enter the 12-digit canister ID, or place the canister on the chip writer." Below this text is a label "Canister ID: *" followed by a text input field. At the bottom, there are two buttons: "Next >>" and "Cancel".

Step 2: Verify and destroy the canister

Review the canister ID and build number and click **Destroy** to remove the canister from circulation. Click **Back** to change the canister to be destroyed. After the canister is destroyed, disassemble the canister and place salvageable parts in inventory.

Figure 15: Destroy Canisters verify canister screen

The screenshot shows the same "Destroy Canisters" window, but now the "2 Verify the canister" button is highlighted. Below the buttons, the text reads: "Verify the canister to be destroyed and click Destroy." Below this text are two labels: "Canister ID:" and "Build Number:", each followed by a text input field. The "Canister ID" field contains the value "102017574374" and the "Build Number" field contains the value "1002". At the bottom, there are three buttons: "<< Back", "Destroy", and "Cancel".

Pharmacy Menu

The **Pharmacy** menu includes all activities related to handling medications and canisters at a pharmacy.

Receiving canisters at a pharmacy

Scan the build label of the canisters received at the pharmacy. The screen will refresh and display canister information each time a canister is scanned. Click **Save** to confirm receipt of the canisters.

To remove a canister scanned in error: Highlight the canister and click **Delete**.

Figure 16: Receive Canisters screen

Build Number	Canister ID
1001	102017571223
1002	102017574374

Handling empty canisters

If the canister is empty, the next steps are to:

- Clean the canister.
- Remove the medication fill label.
- Inspect the canister for broken and/or missing parts.

Upon completion of the cleaning and inspection process, select **Reclaim Canisters** from the **Pharmacy** menu and complete the process to certify the canister is ready to be filled with medication. Refer to the [Reclaiming canisters](#) guidelines for more information.

Handling canisters with remaining medication

If the canister has remaining medication, the next steps are to:

- Package the remaining medication in a zipper storage bag or container.
- Print a reclaim medication label for the zipper storage bag or container.
- Clean the canister.
- Remove the medication fill label from the canister lid.
- Inspect the canister for broken and/or missing parts.

To reclaim medications: Select **Reclaim Medications** from the **Pharmacy** menu. Refer to the [Reclaiming medications](#) guidelines for more information. Upon completion of the reclaim medications process, the next step is to reclaim the canisters.

Reclaiming canisters

Reclaiming canisters is a multiple step process where you clean and inspect the canisters, scan the canisters, and certify the canisters are ready to be filled. The canister must be empty prior to performing this process. Refer to the [Reclaiming medications](#) guidelines for more information on handling canisters with remaining medication.

Step 1: Clean and inspect the canisters

Clean the canister, remove the medication fill label located on the canister lid, and inspect the canister for broken and/or missing parts.

Step 2: Scan the canisters

Scan the build label of the canisters that have been emptied, cleaned, and inspected. The screen will refresh and display canister information each time a canister is scanned.

A warning pop-up will display if you have scanned a canister containing a controlled substance is scanned where the quantity remaining in the database is greater than zero. Upon receiving the warning, verify that physical quantity remaining in the canister equals the quantity cited in the warning message. If the physical quantity remaining does not equal the quantity cited in the warning message, notify a pharmacist immediately as this may be a sign of possible diversion.

To remove a canister scanned in error: Highlight the canister and click **Delete**.

Figure 17: Reclaim Canisters screen

Build Number	Canister ID
1001	102017571223
1002	102017574374

Step 3: Certify the canisters

Click **Certify** to confirm the canisters have been emptied, cleaned (washed and medication fill label removed), inspected, and are ready to be filled with medication. Place the canisters in inventory or fill them with medication.

Filling canisters

Prior to filling canisters, create the canister picklist to assist you in gathering canisters for medications you need to fill. Refer to the [Creating canister picklists](#) guidelines for more information on creating a canister picklist.

Filling canisters is a multiple step process where you place the canister on the chip writer, enter the fill details, print the medication fill label, encode the canister chip, and verify the medication fill label and canister chip are in sync.

Step 1: Place the canister on the chip writer

Place the canister on the chip writer. The system will verify the canister chip is valid and auto-advance you to the next step.

Step 2: Register the NDC

There are two ways to register the NDC: (1) scan the NDC barcode on the medication bottle or (2) enter the NDC number manually.

Scanning the NDC barcode

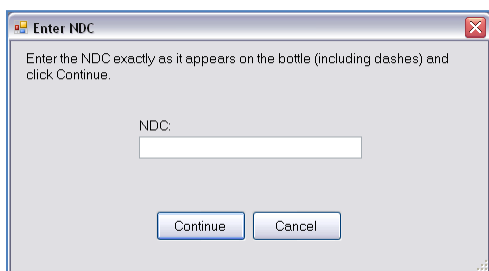
Scan the NDC barcode located on the medication bottle. The system will verify the medication does or does not exist in the system and auto-advance you to the next step if the medication exists. If the medication does not exist, the system will prompt you with instructions on how to add the medication to the system.

Note: When an NDC barcode is scanned for the first time, the system will prompt you to enter the NDC exactly as it appears on the medication bottle, including dashes. When this occurs, enter the NDC number and click **Continue**.

Entering the NDC number manually

In the event you do not have the medication bottle or the NDC barcode is damaged, click the **Enter NDC** button and enter the NDC number manually.

Figure 18: Enter NDC screen



Note: Required fields appear in **bold, black** text.

- **NDC:** Enter the NDC number exactly as it appears on the medication bottle including all three segments and dashes. Do not manually insert additional numbers such as leading zeros.

Click **Continue** to advance to the next step.

Handling medications that do not exist in the system

Select **Medications > By Name** from the **Records** menu and click **Add** on the **Medications** screen that appears. Refer to the [Adding, viewing, and editing medications](#) guidelines for more information.

Step 3: Enter the fill details

The screen contains left and right sections; the left section contains the medication attribute details (e.g. shape, color, photo) and the right section contains general medication information (e.g. NDC number, pill quantity, pharmacist).

First, select the medication attribute set or click the **Add Attribute** button to enter a new attribute set. Next, enter the fill details including: pill quantity, lot number(s), expiration date(s), and pharmacist. Finally, click **Print & Encode** to print the medication fill label and encode the canister chip.

Selecting the medication attribute set

A “medication attribute set” is a collection of the physical characteristics of the medication including but not limited to: form, shape, color, length, width, and thickness. A medication can have multiple attribute sets. For example, Medication LMN recently changed from a round/brown pill to an oblong/orange pill with no change to the NDC number. While this scenario is rare, it is imperative that you select the correct attribute set when filling canisters as canister builds are approved for individual medication attribute sets.

All attribute sets for the medication will display in the list box in the left-hand section. Select the appropriate attribute set by highlighting it in the list box. The selected attribute set is used to:

- Determine if the canister build is approved to be filled with the medication attribute set.
- Print the medication attribute characteristics on the medication fill label.
- Print the medication attribute characteristics on the packet when dispensed.

Adding a new attribute set

If the attribute set of the medication you are filling in the canister does not exist (does not display in the list box), click the **Add Attribute** button to add a new attribute set.

Figure 19: Add Medication Attribute screen

Medication Name: MAPAP TAB 500MG

NDC: 00904-1983-51

Medication Attribute Details

Form: * - Select One -

Shape: * - Select One -

Color: * - Select One -

Thickness:

Length:

Width 1:

Width 2:

Marking:

Inverse Marking:

Photo:

Link Photo

☐ Remove Photo

Build Details

Build Number: 1009

Max Quantity: *

Problem Type: * - Select One -

Note:

☐ Approved

Save Cancel

Note: Required fields appear in **bold, black** text.

- **Medication Name:** The medication name will display and is not editable.
- **NDC:** The NDC number will display and is not editable.
- **Form:** Select an option from the drop-down list.
- **Shape:** Select an option from the drop-down list.
- **Color:** Select an option from the drop-down list.
- **Thickness:** Enter a value between 0 and 50.
- **Length:** Enter a value between 0 and 50.
- **Width 1:** Enter a value between 0 and 50.
- **Width 2:** Enter a value between 0 and 50.
- **Marking:** Enter up to 25 characters.
- **Inverse Marking:** Enter up to 25 characters.
- **Photo:** Click **Link Photo** to link an existing medication photo to the attribute. In the event you had linked an existing photo to the attribute and wish to remove it, select the **Remove Photo** checkbox. The photo will be removed upon saving the attribute.
- **Build Number:** The build number will display and is not editable.
- **Max Quantity:** Enter a value between 1 and 9,999.
- **Problem Type:** Select an option from the drop-down list.
- **Note:** Enter up to 255 characters. This field is required when the option selected for **Problem Type** is anything other than **None**.

- **Approved:** Select the checkbox if the build has been approved for use with the medication attribute set or leave the checkbox de-selected if the medication is still pending approval.

Click **Save** to add the attribute set.

Entering fill details

Figure 20: Fill Canisters enter fill details screen

Fill Canisters

1 Put canister on writer 2 Register the NDC **3 Enter the fill details** 4 Scan the fill label 5 Remove the canister

Medication: NITROFURANTN CAP 100MG

Attributes

Form	Shape	Color	Marking
Capsule	oblong	black/ivory	E 122

Thickness: 7.6
Length: 21.5
Width 1: 7.6
Width 2:
Inverse Marking: E 122

NDC: 00185-0122 - 01
Build Number: 1006
Pill Quantity: *
Lot Number 1: * - Enter or Select - Exp. Date: * / /
Lot Number 2: * - Enter or Select - Exp. Date: * / /
Lot Number 3: * - Enter or Select - Exp. Date: * / /
Technician: Denise Williamson
Pharmacist: * - Select One -
Manufacturer: SANDOZ
Schedule:
☐ I certify that all lot numbers listed above contain the same pill attributes.

Print & Encode
Cancel

Note: Required fields appear in **bold, black** text.

- **Medication:** The medication name will display and is not editable.
- **NDC:** All three segments of the NDC number will display and is not editable.
- **Build Number:** The build number of the canister will display and is not editable.
- **Pill Quantity:** Enter the quantity of pills filled in the canister; the value must be between 1 and 9,999 and not exceed the maximum quantity for the canister build.
- **Lot Number and Exp. Date:** Select an existing lot number or enter a new lot number (15 characters maximum). The lot number entered will display in upper case letters for consistency. At least one lot number and expiration date is required; however, you can enter up to three lot numbers and expiration dates. The expiration date must be entered as MM/DD/YYYY.

Note: If you select an existing lot number, the expiration date will default to the expiration date that was entered at the time the existing lot number was first entered.

Note: If you enter multiple lot numbers, the medication attribute set for each lot must be identical. In other words, you cannot fill a canister with a mixture of blue and red pills.

Note: If you are filling the canister with medication that had previously been reclaimed, enter the fill expiration date located on the reclaim medication label and do not use the expiration date that defaults after you have selected or entered the lot number.

- **Technician:** The name of the user currently logged in will display and is not editable.
- **Pharmacist:** Select an option from the drop-down list.
- **Manufacturer:** The name of the manufacturer derived from the NDC number will display and is not editable.
- **Schedule:** The schedule defined for the medication will display and is not editable.
- **Certification:** Select the certification checkbox when more than one lot number has been selected/entered.

Click **Print & Encode** after you have selected a medication attribute set and entered the fill details. The system will print the medication fill label and encode the canister chip.

Handling medications that are not approved for the build

If a medication attribute set is not approved for the canister build, the system will display a message and you or someone with security rights to override medication fills can approve the canister build to be filled with the medication.

If you have security rights to override the medication fill, you will be prompted to enter details of the medication override.

Figure 21: Override Medication screen

The screenshot shows a software window titled "Override Medication". Inside, there are several labeled input fields. "Medication Name" contains "NITROFURANTIN CAP 100MG". "NDC" contains "00185-0122-01". "Attributes" contains "Capsule, oblong, black/ivory, E 122, E 122". "Build Number" contains "1001". "Max Quantity" is an empty text box. "Problem Type" is a dropdown menu currently showing "- Select One -". "Note" is an empty text box. Below "Note" is an unchecked checkbox labeled "Approved". "Override Reason" is a large empty text area. At the bottom of the window are two buttons: "Save" and "Cancel".

To override the medication for use with the build:

Note: Required fields appear in **bold, black** text.

- **Medication Name:** The medication name will display and is not editable.
- **NDC:** The NDC number will display and is not editable.
- **Attributes:** The form, shape, color, and marking attributes will display and are not editable.
- **Build Number:** The build number will display and is not editable.
- **Max Quantity:** Enter a value between 1 and 9,999.
- **Problem Type:** Select an option from the drop-down list.

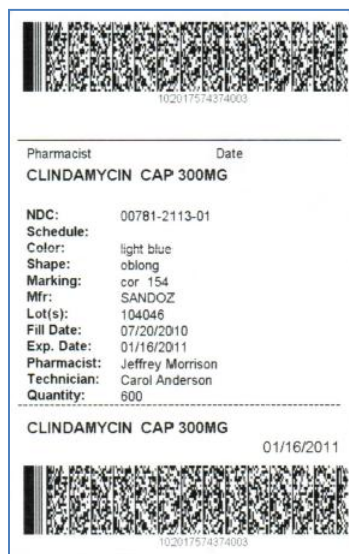
- **Note:** Enter up to 255 characters. This field is required when the option selected for **Problem Type** is anything other than **None**.
- **Approved:** Select the checkbox if the build has been approved for use with the medication or leave the checkbox de-selected if the medication is still pending approval.
- **Override Reason:** Enter up to 255 characters.

Click **Save** to approve the canister build to be filled with the medication.

Step 4: Scan the medication fill label

Scan the newly printed medication fill label. The system will verify that the medication fill label and canister chip match one another.

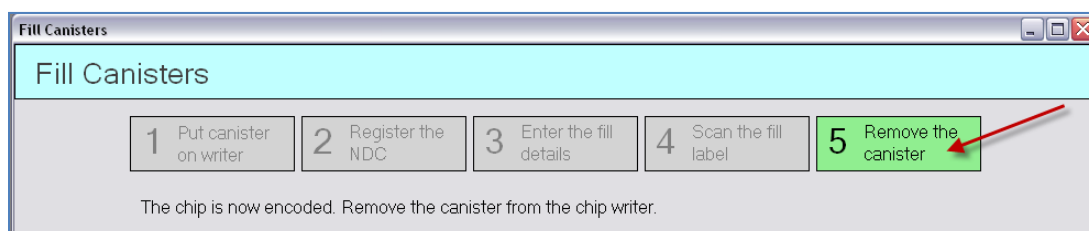
Figure 22: Medication fill label example



Step 5: Remove the canister

Remove the canister from the chip writer when the workflow box for step 5 is illuminated in green. The system will auto-advance you to step 1 to fill another canister. Click **Cancel** on step 1 if you are finished filling canisters.

Figure 23: Fill Canisters remove the canister screen



Shipping canisters to a facility

Shipping canisters to a facility is a two-step process where you select the facility and packager and scan the canisters to ship.

If you are shipping canisters to a central fill packager, the **Facility Name** selection is required; however, you can select any of the facilities that are assigned to the central fill packager. For example, if Dallas Continuing Care and Waco Elderly Care Center are both assigned to the central fill, either facility can be selected in the **Facility Name** drop-down.

Step 1: Select the facility

Figure 24: Ship Canisters to Facility select facility/packager screen

Ship Canisters to Facility

1 Select the facility/packager 2 Scan the canisters

Select the facility to ship canisters to and click Next.

Ship From

Pharmacy Name: ProvideRx of Texas

Address 1: 1200 Texas Trail

Address 2:

City: Grapevine

State: TX

Postal Code: 76534

Phone: 814-785-8566

Fax: 814-785-8590

Ship To

Facility Name: * Dallas Continuing Care Center

Packager: * Install 2 (FF)

Address 1: 5600 Park Lane

Address 2:

City: Dallas

State: TX

Postal Code: 75204

Phone: 541-458-5695

Fax:

Cancel Next >>

Note: Required fields appear in **bold, black** text.

- **Facility Name:** Select an option from the drop-down list.
- **Packager:** Select an option from the drop-down list.

The system will populate the address, phone, and fax fields; verify this information is accurate. Click **Next** to advance to the next step.

Step 2: Scan the canisters

Scan the build label of each canister you need to ship to the facility/packager. The screen will refresh and display canister information each time a canister is scanned.

If you scan a medication to ship to a facility/packager and that medication's medication group is not assigned to the install formulary, the system will display an error and prevent the canister from being shipped. The medication must be added to the install formulary in order to ship that medication to the facility/packager.

To remove a canister scanned in error: Highlight the canister and click **Delete**.

Figure 25: Ship Canisters to Facility scan canisters screen

Medication Name	Quantity	Canister ID	Fill Date
CLINDAMYCIN CAP 300MG	600	102017574374	07/20/2010
NITROFURANTN CAP 100MG	1000	102017571223	07/20/2010

Finalize the ship to facility process using one of the print options listed below.

- Click **Print & New** to print the canister shipping manifest and auto-advance to step 1 to create a new shipment.
- Click **Print & Finish** to print the canister shipping manifest and auto-close the **Ship Canisters to Facility** screen.

Note: Upon clicking **Print & New** or **Print & Finish**, you will be prompted if you want to view the canister shipping manifest on-screen. Viewing the canister shipping manifest is optional as the system automatically prints two copies of the report (when shipping to a facility fill) upon clicking **Print & New** or **Print & Finish**. The report will not print when shipping to a central fill.

Note: A third copy of the report will be saved in the save path directory defined in **Records > Pharmacies**.

Reclaiming medications

Reclaiming medications is a multiple step process where you scan the canister, enter the quantity remaining, print the medication label, empty the canister, package the remaining medication, and affix the label to the zipper storage bag or container.

Step 1: Scan the canister

Scan the build label of the canister containing the remaining medication. The screen will refresh and display canister information.

Step 2: Enter the quantity remaining

Note: Required fields appear in **bold, black** text.

- **Medication:** The medication name will display and is not editable.
- **NDC:** The first two segments of the NDC number will display and are not editable.

- **Current Quantity:** The current quantity per the database will display and is not editable.
- **Quantity Remaining:** Enter the quantity of medication remaining. Compare this quantity to the value in the Current Quantity field. If the two quantities are not equal or relatively close to one another, notify a pharmacist immediately as this is a sign of possible diversion.

Finalize the reclaim medications process using one of the print options listed below. See **Figure 26** below.

- Click **Print & New** to finalize the process, print the medication label, and auto-advance to step 1 to reclaim additional medications.
- Click **Print & Finish** to finalize the process, print the medication label, and auto-close the **Reclaim Medications** screen.

Figure 26: Reclaim Medications enter quantity screen

The screenshot shows a software window titled "Reclaim Medications". Inside, there are two numbered steps: "1 Select the canister" and "2 Enter the quantity". Step 2 is currently active. Below the steps, it says "Enter the quantity remaining and click Print." There are three input fields: "Medication Name:" with the value "NITROFURANTN CAP 100MG", "NDC:" with the value "00185-0122-01", and "Quantity Remaining:" which is empty. At the bottom, there are three buttons: "Print & New", "Print & Finish", and "Cancel".

Step 3: Empty the canister and affix the label

Empty the remaining medication into a zipper storage bag or container and affix the reclaim medication label to the bag or container.

Figure 27: Reclaim medication label example (without NDC barcode)

The screenshot shows a medication label for "CLINDAMYCIN CAP 300MG". The label contains the following information: NDC: 00781-2113-01, Schedule: (blank), Color: light blue, Shape: oblong, Marking: cor 154, Mfr: SANDOZ, Lot(s): 104046, Fill Date: 07/22/2010, Exp. Date: 01/18/2011, and Quantity: 12. The label is framed by a dashed line, and the medication name and expiration date are repeated at the bottom.

Upon completion of the medication reclamation process, select **Reclaim Canisters** from the **Pharmacy** menu and complete the process to certify the canister is ready to be filled with medication. Refer to the [Reclaiming canisters](#) guidelines for more information.

Creating canister picklists

The canister picklist is a report that assists you in gathering canisters for medications you need to fill. First, gather all the medications that need to be filled. Next, scan the NDC barcode located on each medication bottle or enter the NDC exactly as it appears on the bottle (and click **Search**). Upon each scan, the system will verify the medication exists, refresh the screen, and display medication and canister build information.

The highest ranked build for the medication that is in a canister state of **Reclamation** (has been received) or **Empty at Pharmacy** (has been reclaimed) will display in the **Build #** column. In the example below, DIGOXIN TAB 0.25MG does not have any canisters in a Reclamation or Empty at Pharmacy state, however, LORAZEPAM TAB 0.5MG and CLINDAMYCIN CAP 300MG both have at least one canister that can be used to fill with medication.

Tip: If you have canisters in the pharmacy but do not see the build number displayed, verify the canister status by going to **Records > Canisters** and entering in the canister ID. Then proceed to receive and/or reclaim the canister (if applicable) which will update the canister state to **Reclamation** and **Empty at Pharmacy** respectively.

Figure 28: Canister Picklist screen

Medication	NDC	Build #	Max Qty	Form	Shape	Color	Marking
DIGOXIN TAB 0.25MG	00527-1325-01	N/A	0	Tablet	round	white	JSP 545
LORAZEPAM TAB 0.5MG	00781-1403-05	1004	777	Tablet	round	white	GG
CLINDAMYCIN CAP 300MG	00781-2113-01	N/A	0	Capsule	oblong	light blue	cor 154

Reinitializing canisters

Re-initializing a canister chip is a multiple step process where you place the canister on the chip writer, scan the build label of the canister, and reinitialize the canister chip. This step is used when the data written on the chip is no longer in sync with the information written on the build label. For example, the canister chip was replaced or the chip was re-written on the Talyst system.

Step 1: Place the canister on the chip writer

Place the canister on the chip writer. The system will verify the canister chip is valid and auto-advance you to the next step.

Step 2: Scan the build label

Scan the build label of canister on the chip writer. The system will reinitialize the canister chip with the information on the label and set the canister state to **Empty at Pharmacy**.

Note: *If you cancel the action, the canister cannot be used (e.g. filled, shipped) until it is successfully re-initialized.*

Step 3: Remove the canister from the chip writer

Remove the canister from the chip writer. After the canister is removed from the chip writer, you can fill the canister with medication.

Note: *If the canister was filled with medication and then re-initialized, you will need to repeat the **Fill Canisters** process. Doing so will update the canister state to **Filled at Pharmacy** and allow the canister to be shipped to a facility. A common scenario where this would occur would be if you filled a canister and then scanned the canisters to be shipped to an incorrect facility.*

Records Menu

Records are comprised sets of data that represent an entity (e.g. facility, pharmacy). For example, the “facility” record is comprised of the facility name, address, and phone number. There are many types of records in the system and depending on the record type and your security access, you may be able to add new records and view/edit existing records.

All record screens are designed and function identically to one another. When selecting any of the options from the **Records** menu, you will be brought to a screen commonly referred to as the “search” screen. The nickname accurately depicts the function of the screen; however, the screen offers much more than search capabilities. From the search screen, you can add, view, and edit records.

The search screen contains upper and lower sections. The upper section contains the search parameters and the lower section displays the search results.

Figure 29: Pharmacies search screen

Pharmacy Name	Address Line 1	Address Line 2	City	State	Postal Code	Phone	Fax	Status
ProvideRx of Florida	4568 14th Avenue	Suite 100	Sunnyvale	FL	15874	874-451-8544	874-451-8590	Active
ProvideRx of Grap...	200 Plano Drive		Plano	TX	75070	214-098-8374		Active
ProvideRx of Minn...	7700 East 7th Street		Burnsville	MN	55337	952-857-8566	952-857-8590	Active
ProvideRx of Texas	1200 Texas Trail		Grapevine	TX	76534	814-785-8566	814-785-8590	Active

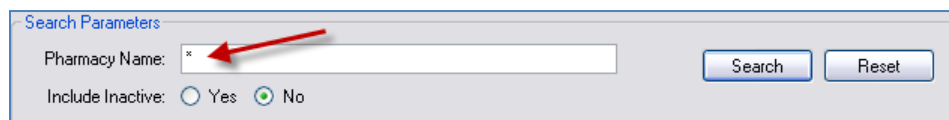
To search a record:

1. From the **Records** menu, select an option (e.g. Pharmacies).
2. Enter one or more search parameters, click **Search**.

Note: You must click **Search** to refresh the search results if you change your search parameters. Click **Reset** to reset the search parameters to the default values.

Tip: Enter an asterisk (*) in most text field search parameters (do not enter any other character in the text field) to search all records.

Figure 30: Pharmacies search parameters



Search Parameters

Pharmacy Name: *

Include Inactive: ☐ Yes ☒ No

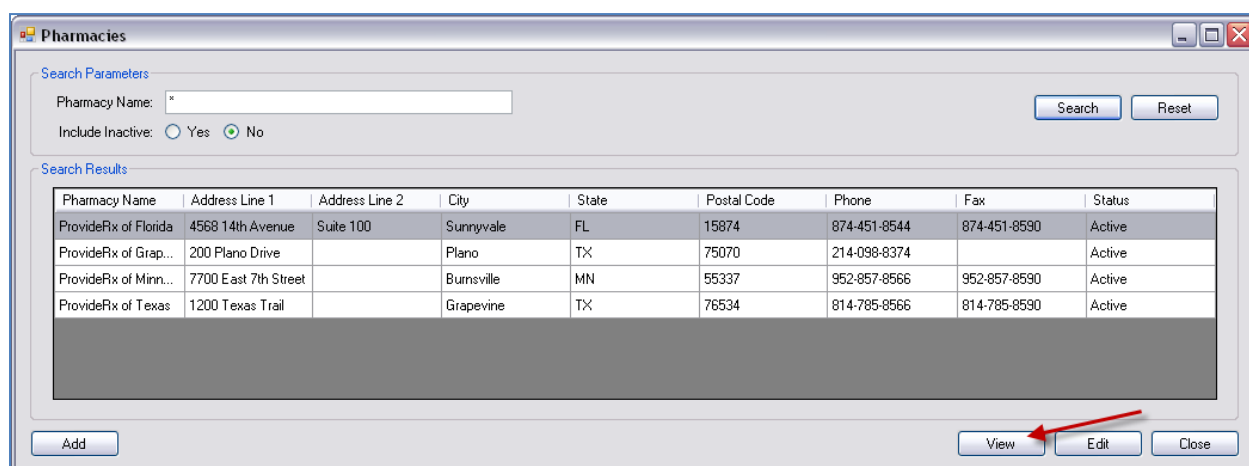
Search Reset

To view a record:

1. From the **Records** menu, select an option (e.g. Pharmacies).
2. Enter one or more search parameters, click **Search**.
3. In the search results section, highlight the record to view.
4. Double click, click the **View** button, or right-click and select **View**.
The **View** screen for the selected record appears.
5. Click **Close** to close the view screen and return to the search.

Tip: To minimize clicks, double click the record in the search results section.

Figure 31: Pharmacies search screen - View



Pharmacies

Search Parameters

Pharmacy Name: *

Include Inactive: ☐ Yes ☒ No

Search Reset

Search Results

Pharmacy Name	Address Line 1	Address Line 2	City	State	Postal Code	Phone	Fax	Status
ProvideRx of Florida	4568 14th Avenue	Suite 100	Sunnyvale	FL	15874	874-451-8544	874-451-8590	Active
ProvideRx of Grap...	200 Plano Drive		Plano	TX	75070	214-098-8374		Active
ProvideRx of Minn...	7700 East 7th Street		Burnsville	MN	55337	952-857-8566	952-857-8590	Active
ProvideRx of Texas	1200 Texas Trail		Grapevine	TX	76534	814-785-8566	814-785-8590	Active

Add View Edit Close

To edit a record:

1. From the **Records** menu, select an option (e.g. Pharmacies).
2. Enter one or more search parameters, click **Search**.
3. In the search results section, highlight the record to edit.
4. Click the **Edit** button or right-click and select **Edit**.
The **Edit** screen for the selected record appears.
5. Click **Save** to save your edits or **Cancel** to close the edit screen and return to the search.

Figure 32: Pharmacies search screen - Edit

Search Parameters

Pharmacy Name:

Include Inactive: ☐ Yes ☒ No

Search Results

Pharmacy Name	Address Line 1	Address Line 2	City	State	Postal Code	Phone	Fax	Status
ProvideRx of Florida	4568 14th Avenue	Suite 100	Sunnyvale	FL	15874	874-451-8544	874-451-8590	Active
ProvideRx of Grap...	200 Plano Drive		Plano	TX	75070	214-098-8374		Active
ProvideRx of Minn...	7700 East 7th Street		Burnsville	MN	55337	952-857-8566	952-857-8590	Active
ProvideRx of Texas	1200 Texas Trail		Grapevine	TX	76534	814-785-8566	814-785-8590	Active

Buttons: Add, View, Edit, Close

To add a record:

1. From the **Records** menu, select an option (e.g. Pharmacies) and click **Add**.
The **Add** screen for the record type appears.
2. Enter data in the applicable fields.
3. Save the record using one of the save options listed below or click **Cancel** to close the add screen and return to the search.
 - a. **Save:** Saves the record, closes the **Add** screen, and returns you to the search screen.
 - b. **Save & New:** Saves the record and refreshes the screen with a new, blank **Add** screen.
 - c. **Save & Copy:** Saves the record and refreshes the screen with a new, pre-filled **Add** screen. "Pre-filled" means that the some of the values entered on the previous record will default on the new **Add** screen; these default values are editable.

Figure 33: Pharmacies search screen – Add

Search Parameters

Pharmacy Name:

Include Inactive: ☐ Yes ☒ No

Search Results

Pharmacy Name	Address Line 1	Address Line 2	City	State	Postal Code	Phone	Fax	Status
ProvideRx of Florida	4568 14th Avenue	Suite 100	Sunnyvale	FL	15874	874-451-8544	874-451-8590	Active
ProvideRx of Grap...	200 Plano Drive		Plano	TX	75070	214-098-8374		Active
ProvideRx of Minn...	7700 East 7th Street		Burnsville	MN	55337	952-857-8566	952-857-8590	Active
ProvideRx of Texas	1200 Texas Trail		Grapevine	TX	76534	814-785-8566	814-785-8590	Active

Buttons: Add, View, Edit, Close

Builds

A “build” is a set of individual canister parts that when assembled, create a canister. A “build number” is an identifier assigned to the canister based on its canister parts. Many canisters can be assigned the same build number but a single canister can only have one build number at any given time. The build number is used throughout the system when initializing, filling, and ordering canisters.

Searching builds

Before viewing or editing a build, you must select the build you want to view or edit. The following search parameters are available when searching builds.

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **Build Number:** Enter one or more characters of the build number. The search results will include all canister builds with a build number containing the characters entered.
- **Vendor Part Number:** Enter one or more characters of the vendor part number. The search results will include all canister builds with a vendor part number containing the characters entered.
- **Include Inactive:** Select **No** to search active canisters builds only or select **Yes** to search active and inactive canister builds.

The search results will sort by the Build Number column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing builds

The following fields display when adding, viewing, and editing a build unless otherwise noted.

Note: Required fields appear in **bold, black** text.

- **Build Number:** This is a system generated value when a build is added and is not editable.
- **Main Body:** Select an option from the drop-down list.
- **Partition Position:** Select an option from the drop-down list.
- **Division Block:** Select an option from the drop-down list.
- **Guide Block:** Select an option from the drop-down list.
- **Partition:** Select an option from the drop-down list.
- **Fix Block:** Select an option from the drop-down list.
- **Handle:** Select an option from the drop-down list.
- **Extension:** Select an option from the drop-down list.
- **Vendor Name:** Select an option from the drop-down list.
- **Vendor Part Name:** Enter up to 50 characters.
- **Vendor Part Number:** Enter up to 10 characters.
- **Note:** Enter up to 255 characters.
- **Status:** Select **Active** or **Inactive**.

Canisters

Canisters are all the canisters that exist in the system (currently in circulation and out of circulation).

Searching canisters

Before viewing a canister, you must select the canister you want to view. The following search parameters are available when searching canisters.

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **Canister ID:** Enter one or more characters of the canister ID. The search results will include all canisters with a canister ID containing the characters entered.
- **Canister State:** Select an option from the drop-down list. The search results will include all canisters with the selected canister state.
- **Pharmacy Name:** Enter one or more characters of the pharmacy name. The search results will include all canisters currently assigned to pharmacies with a pharmacy name containing the characters entered.
- **Build Number:** Enter one or more characters of the build number. The search results will include all canister builds with a build number containing the characters entered.
- **Install Description:** Enter one or more characters of the install description. The search results will include all canisters assigned to an install with an install description containing the characters entered.

The search results will sort by the Canister ID column by default. Click any of the column headers to re-sort the results.

Viewing canisters

The following fields display when viewing a canister: Canister ID, Canister State, Pharmacy Name (if applicable), Build Number, Install Description (if applicable), and Applicable Activities. Applicable Activities are tasks you can perform against the canister given its current canister state, depending on your security rights.

Corporations

A “corporation” is the owning entity of one or more facilities. A facility’s corporation must exist in the system before the facility can be added. Many facilities can be assigned the same corporation but a single facility can only have one corporation. Corporations are used for reporting and screen display purposes only.

Searching corporations

Before viewing or editing a corporation, you must select the corporation you want to view or edit. The following search parameters are available when searching corporations.

Note: Required fields appear in **bold, black** text.

- **Corporation Name:** Enter one or more characters of the corporation name. The search results will include all corporations with a corporation name containing the characters entered. At least one character is required to perform the search.
- **Include Inactive:** Select **No** to search active corporations only or select **Yes** to search active and inactive corporations.

The search results will sort by the Corporation Name column by default. Click any of the column headers to re-sort the results with the exception of the Phone and Fax columns.

Adding, viewing, and editing corporations

The following fields display when adding, viewing, and editing a corporation unless otherwise noted.

Note: Required fields appear in **bold, black text**.

- **Corporation Name:** Enter up to 50 characters; must be a unique value.
- **Address Lines 1 and 2:** Enter up to 255 characters for each line.
- **City:** Enter up to 255 characters.
- **State:** Select an option from the drop-down list.
- **Postal Code:** Enter up to 15 characters.
- **Country:** Select an option from the drop-down list.
- **Time Zone:** Select an option from the drop-down list.
- **Phone and Extension:** Enter up to 20 characters for the phone number and 10 characters for the extension.
- **Fax:** Enter up to 20 characters.
- **Status:** Select **Active** or **Inactive**.

Facilities

Facilities are LTC facilities dispensing medications from the OnSiteRx® Dispensing System.

Searching facilities

Before viewing or editing a facility, you must select the facility you want to view or edit. The following search parameters are available when searching facilities.

Note: Required fields appear in **bold, black text**.

- **Facility Name:** Enter one or more characters of the facility name. The search results will include all facilities with a facility name containing the characters entered. At least one character is required to perform the search.
- **Include Inactive:** Select **No** to search active facilities only or select **Yes** to search active and inactive facilities.

The search results will sort by the Facility Name column by default. Click any of the column headers to re-sort the results with the exception of the Phone and Fax columns.

Adding, viewing, and editing facilities

The following fields display when adding, viewing, and editing a facility unless otherwise noted.

Note: Required fields appear in **bold, black text**.

General information tab

- **Corporation Name:** Select an option from the drop-down list.
- **Facility Name:** Enter up to 50 characters; must be a unique value within the selected corporation.

- **Pharmacy Name:** Select an option from the drop-down list.
- **Pharmacy System:** This is a system defaulted value derived from the **Pharmacy System** selection for the pharmacy that the facility is assigned to. A couple things to note:
 - The **Pharmacy System** selection on the facility record is editable only by users who have the System Admin security right.
 - Editing the **Pharmacy System** selection on the pharmacy record will not trigger an update to the **Pharmacy System** selection of the facilities that are assigned to that pharmacy.
 - Editing the pharmacy assigned to a facility will trigger an update to the **Pharmacy System** selection for that facility to match the pharmacy system of the newly assigned pharmacy.
- **NPI:** Enter up to 10 characters; must be a unique value.
- **Facility Code:** Enter up to 6 characters; must be a unique value.
- **Address Lines 1 and 2:** Enter up to 255 characters for each line.
- **City:** Enter up to 255 characters.
- **State:** Select an option from the drop-down list.
- **Postal Code:** Enter up to 15 characters.
- **Country:** Select an option from the drop-down list.
- **Time Zone:** Select an option from the drop-down list.
- **Phone and Ext.:** Enter up to 20 characters for the phone number and 10 characters for the extension.
- **Fax:** Enter up to 20 characters.
- **Activation Key:** An activation key will generate upon Save.
- **Last Known IP Address:** This is a system generated value and is not editable.
- **Status:** Select **Active** or **Inactive**.

Display settings tab

- **Name Display:** Select **Corporation-Facility** to display the corporation name followed by the facility name (e.g. Long Term Nursing Chain – Nursing Home ABC). Select **Facility** to display the facility name only (e.g. Nursing Home XYZ).
- **Time Display:** Select **12 Hour (11:56 PM)** or **24 Hour (23:56)**.
- **ODS/MAR User Session Timeout:** Select an option from the drop-down list. This is the grace period that the user can be inactive for before being automatically locked out of the OnSiteRx® Dispensing System.
- **Administration Window:** Select an option from the drop-down list. This is the grace period beyond the hour of administration when the dose will remain available to dispense. For example, if the hour of administration is 13:00 and the administration window is 2 hours, then the dose will be available to dispense until 15:00.

Note: The administration window is hard-coded to be four hours for facilities that are assigned to a central fill packager. For example, if you have two facilities assigned, Dallas Continuing Care and Waco Elderly Center and administration window for Dallas is set to three hours and the administration window for Waco is set to two hours, the system overrides the administration window settings and applied a four hour administration window for both facilities.

- **Next Day Doses Available At:** Select an option from the hour, minute, and AM/PM drop-down lists. This option dictates the time of day at which doses for the following day will become available to dispense for facilities receiving a daily batch file. For example, if today is 07/01/2011 and 6:00 PM is selected, then doses for 07/02/2011 will become available to dispense at 6:00PM on 07/01/2011.

- **MRN is Required:** Select the checkbox to require the resident medical record number be included in the resident message received from the pharmacy system. When selected, the system will reject resident messages that do not contain a MRN.

Packet settings tab

- **HOA Display:** Select **HOA Time** to display the actual HOA or **Patient Directed** to display the phrase “PATIENT DIRECTED” in place of the actual HOA. This setting designates the value that will print on the packet. It does not affect reports.
- **Primary, Secondary, and Tertiary Routine Dispense Packet Sort Order:** Select an option from the drop-down lists. The sort order defined is applied to the packet sort order within the packet strip.
- **Primary, Secondary, and Tertiary Controlled Substance Packet Sort Order:** Select an option from the drop-down lists. The sort order defined is applied to the packet sort order within the packet strip.
- **Print Ctrlld Sub Count Sheet:** Select **Always** to print the Controlled Substance Count Sheet every time a controlled medication is dispensed. Select **Never** to prevent the system from printing the Controlled Substance Count Sheet or select **Routine Only** to print the Controlled Substance Count Sheet only when a controlled medication is dispensed as part of a routine daily dispense.

Units tab

The **Units** tab contains upper and lower sections. The upper section displays units in the facility and the installs assigned to those units. The lower section is used to add new units, edit the unit name, edit the install currently assigned to a unit, and/or delete a unit altogether.

Figure 34: Units tab of facility record

Unit	Ext. Code	Primary	C F	Primary Status	PRN	C F	PRN Status
South	WE5616	Install 2 (FF)	<input type="checkbox"/>	None		<input type="checkbox"/>	
East	UU5051	Install 2 (FF)	<input type="checkbox"/>	None		<input type="checkbox"/>	
West	UYJY00	Install 2 (FF)	<input type="checkbox"/>	None		<input type="checkbox"/>	
North	SD852	Install 2 (FF)	<input type="checkbox"/>	None		<input type="checkbox"/>	

Buttons: Add, Edit, Delete

Add/Edit Unit

Unit * Unit Code *

Primary PRN

Buttons: Update, Clear

Buttons: Save, Cancel

To edit a unit or install assigned to a facility:

1. On the facility record, select the **Units** tab.
2. Highlight the unit to edit.
3. Click **Edit** and make the necessary changes.

4. Click **Update**.
5. Click **Save** when all changes have been completed.

To delete a unit assigned to a facility:

1. On the facility record, select the **Units** tab.
2. Highlight the unit to delete.
3. Click **Delete**.
4. Click **Save** when all changes have been completed.

To add a unit to a facility:

Note: A pharmacy must be selected on the **General Information** tab prior to adding a unit.

1. On the facility record, select the **Units** tab.
2. Click **Add**.
3. Enter data in the applicable fields.
 - a. **Unit:** Enter up to 50 characters; must be a unique value within the facility.
 - b. **Unit Code:** Enter up to 6 characters; must be a unique value within the facility.
 - c. **Primary:** Select an option from the drop-down list.
 - d. **PRN:** PRN installs are currently not supported.
4. Click **Update**.
5. Click **Save** when all changes have been completed.

Click **Clear** to cancel editing or adding a unit.

Install Formularies

Install formularies are master lists of medications that should be in the specific packager inventory at all times. Each time an install is added to the system (Records > Installs), a corresponding install formulary record is added. The install formulary is utilized when (1) shipping canisters to a facility, (2) displaying canister statuses on reports and in ODS, and (3) gathering data for the Canister Replacement report.

The system will prevent a canister from being shipped to a facility/packager when the medication group of the medication attempting to be shipped is not assigned to the install formulary. If you scan a medication to ship to a facility/packager and that medication's medication group is not assigned to the install formulary, the system will display an error and prevent the shipping of that canister. The medication must be added to the install formulary in order to ship that medication to the facility/packager.

Canisters will display with a **Monitor** status when the medication is assigned to the facility/packager (in the packager, in the storage unit, sent to the facility, and sent to the pharmacy) but the medication's medication group is not assigned to the install formulary.

The system utilizes the install formulary in two ways when gathering data to display on the **Canister Replacement** report.

- Medications that are assigned to the facility/packager (in the packager, in the storage unit, and sent to the facility) but are not assigned to the install formulary will NEVER display on the Canister Replacement report. For example, there is a canister of METOPROLOL TAB 25MG ER in the packager with a quantity remaining of 3. METOPROLOL TAB 25MG ER's medication group is not assigned to the install formulary. Since this medication group is not assigned to the install formulary, it will not display on the Canister Replacement report even though the quantity is less than or equal to 10. If the medication group was assigned to the install formulary, the medication would display on the Canister Replacement report.
- Medication groups that are assigned to the install formulary but no canisters are currently assigned to the facility/packager (in the packager, in the storage unit, or sent to the facility) will display on the Canister Replacement report with a **QoH** of 0 and a **Replace Date** of the current date.

Searching install formularies

Before viewing or editing an install formulary, you must select the install formulary you want to view or edit. The following search parameters are available when searching install formularies.

Note: Required fields appear in **bold, black text**.

- **Install Description:** Enter one or more characters of the install description. The search results will include all installs with an install description containing the characters entered.

The search results will sort by the Description column by default. Click any of the column headers to re-sort the results.

Viewing and editing install formularies

The view and edit install formulary screens contain upper and lower sections. The upper section displays medications currently assigned to the install formulary and the lower section is used to add and remove existing medications to and from the install formulary.

Figure 35: Edit Install Formulary screen

	Medication Name	NDC	GPI
1	ALPRAZOLAM TAB 0.25MG	00781-1061-01	57100010000305
2	BONIVA TAB 150MG	00004-0186-82	30042048100360
3	CYMBALTA CAP 20MG	00002-3235-60	58180025106720
4	HYDROCHLOROT TAB 25MG	00143-1256-10	37600040000305
5	LISINAPRIL TAB 2.5MG	00172-3757-60	36100030000303
6	MAPAP TAB 500MG	00904-1988-80	64200010000315
7	OXYBUTYNIN TAB 5MG ER	00378-6605-01	54000030107520
8	PHENYTOIN EX CAP 100MG	00378-1560-10	72200030200110
9	SERTRALINE TAB 25MG	00378-4186-01	58160070100305
10	WARFARIN TAB 1MG	51672-4027-01	83200030200303

Delete

Add Medication

NDC/Medication Name:

Medication Name	NDC	GPI
-----------------	-----	-----

To delete a medication assigned to an install formulary:

1. Highlight the desired medication in the upper section.
2. Click **Delete**.
3. Repeat steps 1-2 until all desired medications have been deleted.
4. Click **Save**.

To add a medication to an install formulary:

Note: Multiple medications for a single medication group can be added, however, only one medication per medication group is required for the system to perform install formulary validations when shipping canisters to a facility and displaying data on the Canister Replacement report.

1. In the lower section of the install formulary record, enter a minimum of 3 characters in the **NDC/Medication Name** field. The search results will include all active medications with an NDC or medication name containing the characters entered.

Note: Values can be copied and pasted into this field or NDC can be entered with or without dashes. Wildcard (*) functionality is not supported.

2. Click **Search**.

Note: Hit the **Enter** key on the keyboard to trigger the search.

3. Highlight the medication to add.
4. Click **Update**.
5. Repeat steps 1-4 until all desired medications have been added.
6. Click **Save**.

Click **Clear** to reset the search parameters to the default values.

Installs

Installs are all the kiosk installations for all OnSiteRx® pharmacies and corresponding facilities.

Searching installs

Before viewing or editing an install, you must select the install you want to view or edit. The following search parameters are available when searching installs.

Note: Required fields appear in **bold, black text**. Although all parameters are optional, you must enter or select at least one search parameter.

- **Description:** Enter one or more characters of the install description. The search results will include all installs with an install description containing the characters entered.
- **Install Type:** Select an option from the drop-down list. The search results will include all installs with the selected install type.
- **Current Status:** Select an option from the drop-down list. The search results will include all installs with the selected status.
- **Include Inactive:** Select **No** to search active corporations only or select **Yes** to search active and inactive corporations.

The search results will sort by the Description column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing installs

The following fields display when adding, viewing, and editing an install unless otherwise noted.

Note: Required fields appear in **bold, black text**.

- **Description:** Enter up to 255 characters.
- **Install Type:** Select an option from the drop-down list. PRN and MAR install types are currently not supported.
- **Central Fill Install:** Select **Yes** if the install is a central fill. Select **No** if the install is not a central fill. The selection for this option enabling or disables the Routine Cycle Max Range option.
- **Routine Cycle Max Range:** Select an option from the drop-down list. This option dictates the maximum dispense through date that can be selected when conducting a routine cycle dispense in a central fill install for facilities where the full prescription is available in the database (do not receive a daily batch file). For example, if today is 07/01/2011 and **5 Days** is selected for the **Routine Cycle Max Range** option, then the maximum through date that can be selected when conducting a routine cycle dispense is 07/06/2011. If 07/06/2011 is selected when dispensing, doses will dispense through 07/06/2011 and the

system will prevent dates prior to 07/06/2011 from being selected for all subsequent routine cycle dispenses for that facility.

- **Note:** Enter up to 255 characters.
- **Status:** Select **Active** or **Inactive**.

Packager information section

The following fields are enabled when Primary is selected for the Install Type.

- **Serial Number:** Enter up to 255 characters.
- **Model Number:** Enter up to 50 characters.
- **IP Address:** Enter a value.
- **Port Number:** Enter a value between 1 and 65,535.
- **Packet Shipping Manifest:** Enter a properly formatted local or network path. A copy of each Packet Shipping Manifest will save to the directory entered here.
- **Ctrl'd Sub Count Sheet:** Enter a properly formatted local or network path. A copy of each Controlled Substance Count Sheet will save to the directory entered here.
- **Install Name:** This is a system generated value and is not editable.
- **Activation Key:** An activation key will generate upon Save.
- **Software Version:** This is a system generated value and is not editable.
- **Current Status:** This is a system generated value and is not editable.

Packet formats section

The following fields are enabled when **Primary** is selected for the **Install Type**.

- **Dispense Start:** Select an option from the drop-down list.
- **New Unit:** Select an option from the drop-down list.
- **Routine Dispense:** Select an option from the drop-down list.
- **Controlled Substance Start:** Select an option from the drop-down list.
- **Controlled Substance Dispense:** Select an option from the drop-down list.
- **Blank:** Select an option from the drop-down list.
- **Destroy:** Select an option from the drop-down list.
- **Dispense Complete:** Select an option from the drop-down list.

Medication Groups

A “medication group” (aka pharmacy formulary) is a group of one or more medications with the same GPI that can be administered interchangeably for resident care and billing. Medication groups are copied from a designated pharmacy at the time a new pharmacy is added. Medication groups can be edited thereafter.

There are four medication group types:

- **Main:** Can include medications that have a trade type of brand (B), branded generic (BG), and generic (G).
- **Brand:** Includes medications that have trade type of brand (B) only.
- **Branded Generic:** Includes medications that have a trade type of branded generic (BG) only.
- **Generic:** Includes medications that have a trade type of generic (G) only.

The “medication group number” is a system generated value beginning with the GPI of the medication and is not editable. Every GPI will have a “main” medication group. The main medication group can be sub-grouped based on trade type. Each time a medication group is sub-grouped, a unique medication group number is generated, appending B, BG, or G to the GPI. These primary sub-groups can be further sub-grouped as needed.

Note: The GPI is a 14-digit number, however, is referenced as a 5-digit number in the example below for simplicity.

For example, the GPI for a medication is 12345 and is sub-grouped based on trade type creating three additional medication groups: 12345-B, 12345-BG, and 12345-G. The generic medication group of this medication is sub-grouped creating two additional medication groups: 12345-G2 and 12345-G3. In this example, the pharmacy will have the following medication groups for the medication: 12345, 12345-B, 12345-BG, 12345-G, 12345-G2, and 12345-G3.

Searching medication groups

Before viewing or editing a medication group, you must select the medication group you want to view or edit. The following search parameters are available when searching installs.

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **NDC:** Enter one or more characters of the three segment NDC number including leading zeros but not dashes. The search results will include all medications with a NDC number containing the characters entered.
- **Medication Name:** Enter one or more characters of the medication name. The search results will include all medications with a medication name containing the characters entered.
- **GPI:** Enter one or more characters of the GPI. The search results will include all medications with a GPI containing the characters entered.

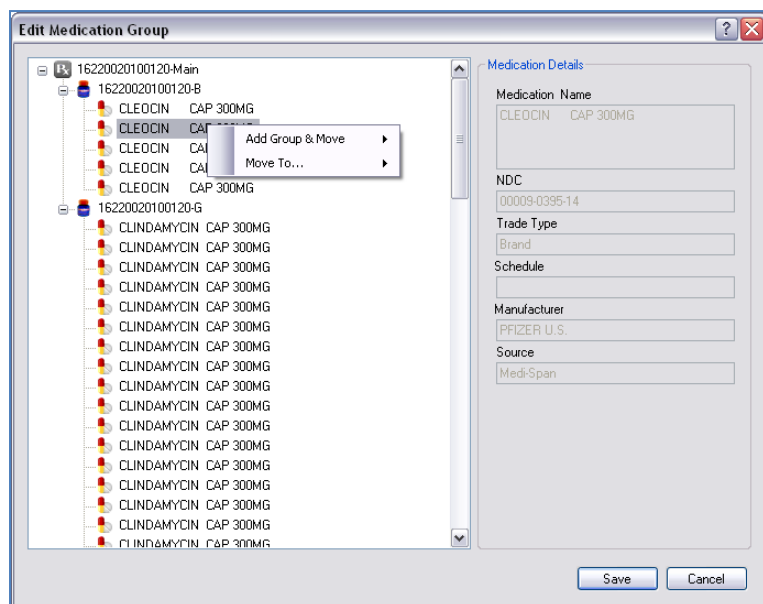
The search results will sort by the GPI column by default. Click any of the column headers to re-sort the results.

Viewing and editing medication groups

Medication groups will display in a hierarchical tree view. Additional medication details display to the right of the tree view when the medication name is highlighted. Right-click functionality provides the capability to move medications between groups, remove medication groups, and create new medication groups.

Medications can be moved between groups or to a new group at any time; however they are restricted to specific groups based on the trade type. The **Main** medication group is the only group that allows medications with different trade types to co-exist. For example, a medication with a trade type of “generic” cannot be moved to a medication group containing medications with a trade type of “brand.”

Figure 36: Edit Medication Group screen



To move a medication to an existing medication group:

1. Right-click on the medication name.
2. Select **Move To...**
3. Select an option from the drop-down list.
4. Click **Save** when all changes have been completed.

To move a medication to a new medication group:

1. Right-click on the medication name.
2. Select **Add Group & Move**.
3. Select an option from the drop-down list.
4. Click **Save** when all changes have been completed.

To remove a medication group:

Note: The medication group must be empty prior to removing it.

1. Right-click on the medication group name.
2. Select **Remove Group**.
3. Click **Save** when all changes have been completed.

To create a new medication group:

1. Right-click on the medication group name.
2. Select **Add Group**.
3. Select an option from the drop-down list.
4. Click **Save** when all changes have been completed.

Example: Creating new medication groups

Four medications are assigned the same GPI (for example, 12345) and have a mixture of trade types.

- Medication A (brand)
- Medication B (branded generic)
- Medication C (branded generic)
- Medication D (generic)

For example purposes, all four medications are currently assigned to the **Main** medication group (12345) but they need to be sub-grouped because all four medications are not covered by insurance even though they all treat the resident's condition equally. No subgroups exist currently.

Let's begin editing the medication groups in the following order:

1. Right-click on Medication A (brand) and one option appears in the drop-down list: **Add Group & Move**. Select **Add Group & Move** and then select **Brand**. The system:
 - a. Removes Medication A from medication group 12345-Main.
 - b. Creates and assigns Medication A to medication group 12345-B.
2. Right-click on Medication B (branded generic) and one option appears in the drop-down list: **Add Group & Move**. The sub-group created in step 1 does not display in the drop-down as an existing group to move Medication B into because Medication A has a trade type of brand whereas Medication B has a trade type of branded generic. Select **Add Group & Move** and then select **Branded Generic**. The system:
 - a. Removes Medication B from medication group 12345-Main.
 - b. Creates and assigns Medication B to medication group 12345-BG.
3. Right-click on Medication C (branded generic) and two options appear in the drop-down list: **Add Group & Move** and **Move To**. Select **Move To** and then select **12345-BG**. The system:
 - a. Removes Medication C from medication group 12345-Main.
 - b. Assigns Medication C to medication group 12345-BG. Medication group 12345-BG now contains two medications: Medication B and Medication C.
4. Right-click on Medication D (generic) and one option appears in the drop-down list: **Add Group & Move**. Select **Add Group & Move** and then select **Generic**. The system:
 - a. Removes Medication D from 12345-Main.
 - b. Creates and assigns Medication D to medication group 12345-G.

A few months pass and Medication B and C can no longer be administered interchangeably due to billing changes and need to be broken into their own sub-groups.

5. Right-click on Medication B and two options appear in the drop-down list: **Add Group & Move** and **Move To**. Select **Add Group & Move** and then select **Branded Generic**. The system:
 - a. Removes Medication B from 12345-BG. Medication group 12345-BG now contains Medication C only.
 - b. Creates and assigns Medication B to medication group 12345-BG2.

*Note: If you right-click on Medication C, two options appear in the drop-down list: **Add Group & Move** and **Move To**. If you select **Move To**, two options appear in the drop-down list: 12345-Main and 12345-BG2.*

The steps above result in the following medication groups:

- **12345-Main** does not contain any medications.
- **12345-B** includes Medication A only.
- **12345-BG** includes Medication C only.
- **12345-BG2** includes Medication B only.
- **12345-G** includes Medication D only.

Medications

Medications are all the medications that exist in all pharmacies setup in the OnSiteRx® Pharmacy System (one master list). Edits made to medications by one pharmacy will affect all other pharmacies.

Searching medications

Before viewing or editing a medication, you must select the medication you want to view or edit. There are three medication searches: **By Attribute(s)**, **By Name**, and **By NDC(s)**. The following search parameters are available when searching medications.

By Name

- **Medication Name:** Enter one or more characters of the medication name. The search results will include all medications with a medication name containing the characters entered. At least one character is required to perform the search.

The search results will sort by the Medication Name column by default. Click any of the column headers to re-sort the results.

By Attribute(s)

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **Thickness** and **Variance (+/-)**: Enter one or more characters of the thickness measurement in the **Thickness** field and enter a numeric value in the **+/-** field to search for a range of thicknesses. The search results will include all medications with the specified thickness or within the specified thickness range, depending on if you entered a variance. For example, if you enter 5 for the thickness and enter 2 for the variance (+/-), the search results will include all medications with a thickness between 3 and 7.
- **Length** and **Variance (+/-)**: Enter one or more characters of the length measurement in the **Length** field and enter a numeric value in the **+/-** field to search for a range of lengths.
- **Width 1** and **Variance (+/-)**: Enter one or more characters of the width measurement in the **Width 1** field and enter a numeric value in the **+/-** field to search for a range of widths.
- **Width 2** and **Variance (+/-)**: Refer to the **Width 1 & Variance (+/-)** parameter.
- **Form**: Select an option from the drop-down list.
- **Shape**: Select an option from the drop-down list.
- **Color**: Select an option from the drop-down list.
- **Marking**: Enter one or more characters of the medication marking. The search results will include all medications with markings containing the characters entered.

Note: A valid marking may be “Logo” or a variation of “Logo” to indicate that the logo is on the medication.

- **Include Meds w/o Builds:** Select **No** to search medications that are attached to at least one canister build or **Yes** to search all medications, regardless if the medication is attached to a canister build.
- **Only Include Meds w/Unapproved Builds:** Select **No** to search medications that are attached to at least one canister build (regardless of approval status) or **Yes** to search medications that are attached to at least one canister build and at least one canister build is not approved for the medication.

The search results will sort by the Medication Name column by default. Click any of the column headers to re-sort the results.

By NDC(s)

- **NDC(s):** Enter one or more characters of the three segment NDC number including leading zeros but not dashes; separate multiple NDC numbers by a comma. The search results will include all medications with a NDC number containing the characters entered. At least one character is required to perform the search.

Note: The comma delimited list may have spaces before and/or after the comma or no spaces at all; all are acceptable formats.

The search results will sort by the Medication Name column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing medications

The following fields display when adding, viewing, and editing a medication unless otherwise noted.

Note: Required fields appear in **bold, black text**.

General information tab

- **Medication Name:** Enter up to 60 characters. The value entered will display in upper case letters for consistency.
- **Medication Display Name:** Enter up to 25 characters. The value entered will display in upper case letters for consistency. This value displays throughout ODS, OPS, and ORC.
- **NDC:** Enter the NDC number exactly as it appears on the medication bottle, including dashes. Do not manually insert additional numbers such as leading zeros. Acceptable formats include but are not limited to: #####-####-#, #####-###-##, and #####-####-##.
- **GPI:** Enter 14 characters.
- **Manufacturer:** Select an option from the drop-down list.
- **Trade Type:** Select an option from the drop-down list.
- **Source:** This is a system generated value when a medication is added and is used to differentiate medications from Medi-Span and medications that are manually entered. This field is not editable.
- **Schedule:** Select an option from the drop-down list. Select the “blank” option from the drop-down if the medication is a legend medication.
- **Pack Alone:** Select **Yes** if the medication must be packaged in a separate packet (cannot be combined with other medications) or **No** if the medication can be packaged in a packet with other medications.

- **OTC Medication:** Select **Yes** if the medication is an over-the counter (OTC) medication or **No** if it is not an OTC medication.
- **Problem Type:** Select an option from the drop-down list.
- **Note:** Enter up to 255 characters. This is a required field when the **Problem Type** selected is anything other than **None**.

Attributes tab

Note: Instructions for measuring the thickness, length, width 1, and width 2 can be found in Appendix A (separate document).

- **Bounce Factor:** Enter a value between -10,000 and 10,000.
- **Form:** Select an option from the drop-down list.
- **Shape:** Select an option from the drop-down list.
- **Color:** Select an option from the drop-down list.
- **Thickness:** Enter a value between 0 and 50.
- **Length:** Enter a value between 0 and 50.
- **Width 1:** Enter a value between 0 and 50.
- **Width 2:** Enter a value between 0 and 50.
- **Marking:** Enter up to 25 characters.
- **Inverse Marking:** Enter up to 25 characters.
- **Weight (single pill):** Enter a value between 0 and 50.
- **Weight (10 pills):** Enter a value between 0 and 50.
- **Medication Photo:** Upload a new medication photo or link the medication attribute to an existing photo.

Figure 37: Medication Photo section of medication record

The screenshot shows a software interface for a medication record. The 'Medication Photo' section is highlighted with a red border. It contains a large rectangular area for a photo, three buttons ('New Photo', 'Link Photo', and 'Remove Photo' with a checkbox), and a 'Save' button at the bottom right. Above this section are input fields for 'Inverse Marking:', 'Weight (single pill):', and 'Weight (10 pills):'.

To upload and attach a photo to a medication attribute:

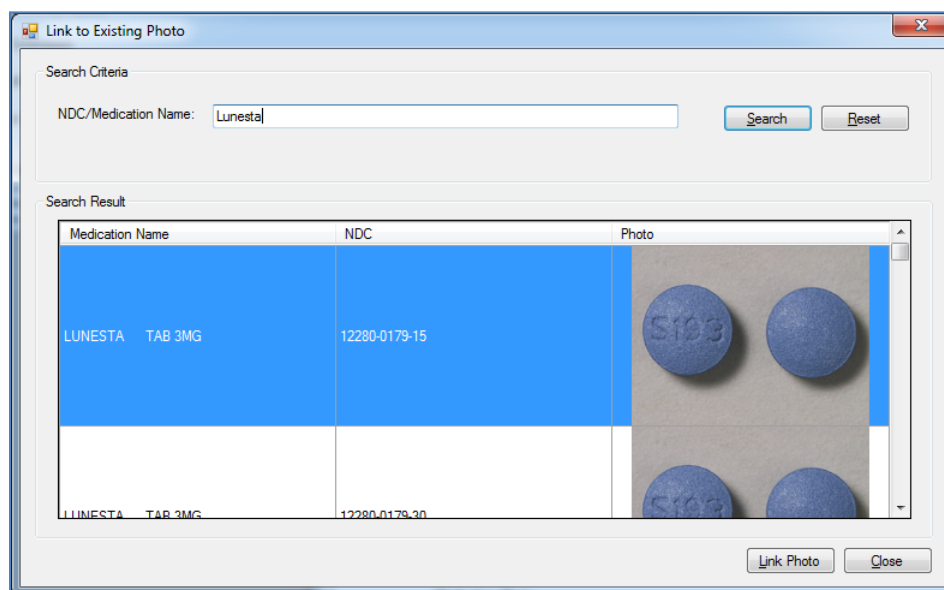
1. Click **New Photo**.
2. Browse to the desired image.
Note: Acceptable formats are .jpg and .jpeg.
3. Complete the necessary steps to select the image.
4. Verify the desired image displays as the medication photo.

5. Click **Save**.

To attach an existing photo to a medication attribute:

1. Navigate to the **Attributes** tab of the desired medication attribute.
2. Click **Link Photo**.

Figure 38: Link to existing photo



3. Enter a minimum of 3 characters in the **NDC/Medication Name** field. The search results will include all active and inactive medication attributes with an NDC or medication name containing the characters entered.

Note: The NDC can be entered with or without dashes. Wildcard (*) functionality is not supported.

4. Select the desired medication attribute photo.
5. Click **Link Photo**.
6. Verify the desired image displays as the medication photo.
7. Click **Save**.

Click **Close** to cancel the action.

To remove a photo attached to a medication attribute:

1. Navigate to the **Attributes** tab of the desired medication attribute.
2. Select the **Remove Photo** checkbox.
3. Click **Save**.

Build sequence tab

The Build Sequence tab contains upper and lower sections. The upper section displays builds currently assigned to the medication in rank/sequence order with the lowest ranked build (#1) being the most compatible to the medication. The lower section is used to add new builds and edit builds currently assigned to the medication (e.g. change max quantity or problem type).

Figure 39: Build Sequence tab of medication record

Rank	Build Number	Max Qty	Problem Type	Note	Approved
1	1189	600	None		Yes
2	1194	1010	None		Yes
3	1002	1000	None		Yes

Buttons: Add, Edit, Delete, Move Up, Move Down

Add Build Sequence

Rank: 4, Build Number: -- Select One --, Max Qty: , Problem Type: -- Select One --, Note: , Approved: ☐

Buttons: Update, Clear

Buttons: Save, Cancel

To modify the rank of assigned builds:

1. On the medication record, select the **Build Sequence** tab.
2. Highlight the build to re-sequence.
3. Click **Move Up** or **Move Down** until the build is ranked as desired.
4. Click **Save** when all changes have been completed.

To edit a build assigned to a medication:

1. On the medication record, select the **Build Sequence** tab.
2. Highlight the build to edit.
3. Click **Edit** and make the necessary changes.
4. Click **Update**.
5. Click **Save** when all changes have been completed.

To delete a build assigned to a medication:

1. On the medication record, select the **Build Sequence** tab.
2. Highlight the build to delete.
3. Click **Delete**.
4. Click **Save** when all changes have been completed.

To add a build to a medication:

1. On the medication record, select the **Build Sequence** tab.
2. Click **Add**.
3. Enter data in the applicable fields outlined below.
 - a. **Rank**: Select an option from the drop-down list. If there are four builds already assigned and you select a rank of 3, the new build will be ranked as #3 and the build previously sequenced as #3 will now be ranked as #4.
 - b. **Build Number**: Enter or select an option from the drop-down.
 - c. **Max Qty**: Enter a value between 1 and 9,999.
 - d. **Problem Type**: Select an option from the drop-down list.
 - e. **Note**: Enter up to 255 characters. This field is required when the option selected for **Problem Type** is anything other than **None**.
 - f. **Approved**: Select the checkbox if the build has been approved for use with the medication or leave the checkbox de-selected if the medication is still pending approval.
4. Click **Update**.
5. Click **Save** when all changes have been completed.

Click **Clear** to cancel editing or adding a build.

Parts

Parts are selected when adding and editing canister builds. Parts include canister parts as well as consumables (e.g. paper, ribbon).

Searching parts

Before viewing a part, you must select the part you want to view. The following search parameters are available when searching parts.

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **Part Name**: Enter one or more characters of the part name. The search results will include all parts with a part name containing the characters entered.
- **Part Number**: Enter one or more characters of the part number. The search results will include all parts with a part number containing the characters entered.
- **Part Type**: Select an option from the drop-down list. The search results will include all parts with the selected part type.
- **Vendor Part Name**: Enter one or more characters of the vendor part name. The search results will include all parts with a vendor part name containing the characters entered.
- **Vendor Part Number**: Enter one or more characters of vendor part number. The search results will include all parts with a vendor part number containing the characters entered.

The search results will sort by the Part Number column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing parts

The following fields display when adding, viewing, and editing a part unless otherwise noted.

Note: Required fields appear in **bold, black text**.

- **Part Number:** This is a system generated value when a part is added and is not editable.
- **Part Name:** Enter up to 50 characters.
- **Part Type:** Select an option from the drop-down list.
- **Vendor Part Number:** Enter up to 20 characters; must be a unique value by part type.
- **Vendor Part Name:** Enter up to 50 characters.
- **Part Description:** Enter up to 255 characters.
- **Vendor Name:** Select an option from the drop-down list.
- **Note:** Enter up to 255 characters.
- **Status:** Select **Active** or **Inactive**.

Pharmacies

Pharmacies are all OnSiteRx® pharmacies that are setup in the OnSiteRx® Pharmacy System.

Searching pharmacies

Before viewing or editing a pharmacy, you must select the pharmacy you want to view or edit. The following search parameters are available when searching pharmacies.

Note: Required fields appear in **bold, black text**.

- **Pharmacy Name:** Enter one or more characters of the pharmacy name. The search results will include all pharmacies with a pharmacy name containing the characters entered. At least one character is required to perform the search.
- **Include Inactive:** Select **No** to search active pharmacies only or select **Yes** to search active and inactive pharmacies.

The search results will sort by the Pharmacy Name column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing pharmacies

The following fields display when adding, viewing, and editing a pharmacy unless otherwise noted.

Note: Required fields appear in **bold, black text**.

General information tab

- **Pharmacy Name:** Enter up to 50 characters; must be a unique value.
- **NPI:** Enter 10 characters; must be a unique value.
- **DEA Number:** Enter 9 characters (must be 2 letters followed by 7 numbers).
- **Pharmacy Code:** Enter up to 6 characters; must be a unique value. This field is enabled and required when the selection for **Pharmacy System** is **FrameworkLTC**.

- **Pharmacy System:** Select an option from the drop-down list. This option is used to default the **Pharmacy System** selection on facilities that are assigned to this pharmacy and to enable/disable the **Pharmacy Code** field. A couple things to note:
 - The **Pharmacy System** selection on the facility record is editable only by users who have the System Admin security right.
 - Editing the **Pharmacy System** selection on the pharmacy record will not trigger an update to the **Pharmacy System** selection of the facilities that are assigned to that pharmacy.
 - Editing the pharmacy assigned to a facility will trigger an update to the **Pharmacy System** selection for that facility to match the pharmacy system of the newly assigned pharmacy.
- **Address Lines 1 and 2:** Enter up to 255 characters for each line.
- **City:** Enter up to 255 characters.
- **State:** Select an option from the drop-down list.
- **Postal Code:** Enter up to 15 characters.
- **Country:** Select an option from the drop-down list.
- **Time Zone:** Select an option from the drop-down list.
- **Phone:** Enter up to 20 characters.
- **Fax:** Enter up to 20 characters.
- **Medication Group Template:** Select an option from the drop-down list.

***Note:** Medication groups can be customized for the pharmacy after they are copied.*

- **Fill Exp. Date Calculation:** Select an option from the drop-down list. Calculations for each option are defined below.

Lot Exp: Gather the earliest lot expiration date entered (up to 3 can be entered per canister fill) and designate it as the canister fill expiration date.

Lot Exp or 60 Days: Gather the earliest lot expiration date entered (up to 3 can be entered per canister fill) and compare it with the current date+60 days. Take the earlier of the lot expiration date or current date+60 days and designate it as the canister fill expiration date.

Lot Exp or 90 Days: Gather the earliest lot expiration date entered (up to 3 can be entered per canister fill) and compare it with the current date+90 days. Take the earlier of the lot expiration date or current date+90 days and designate it as the canister fill expiration date.

Lot Exp or 180 Days: Gather the earliest lot expiration date entered (up to 3 can be entered per canister fill) and compare it with the current date+180 days. Take the earlier of the lot expiration date or current date+180 days and designate it as the canister fill expiration date.

Lot Exp or 365 Days: Gather the earliest lot expiration date entered (up to 3 can be entered per canister fill) and compare it with the current date+365 days. Take the earlier of the lot expiration date or current date+365 days and designate it as the canister fill expiration date.

- **Canister Shipping Manifest (to Pharmacy):** Enter a properly formatted local or network path. A copy of each Canister Shipping Manifest to Pharmacy will save to the directory entered here.
- **Canister Shipping Manifest (to Facility):** Enter a properly formatted local or network path. A copy of each Canister Shipping Manifest to Facility will save to the directory entered here.
- **Activation Key:** An activation key will generate upon Save and is used when installing OPS at a pharmacy.
- **Status:** Select **Active** or **Inactive**.

Installs tab

The Installs tab contains upper and lower sections. The upper section displays installs currently assigned to the pharmacy. The lower section is used to add new installs, edit installs currently assigned, and/or delete an install altogether.

To edit an install assigned to a pharmacy:

1. On the pharmacy record, select the **Installs** tab.
2. Highlight the install to edit.
3. Click **Edit** and make the necessary changes.
4. Click **Update**.
5. Click **Save** when all changes have been completed.

To delete an install assigned to a pharmacy:

1. On the pharmacy record, select the **Installs** tab.
2. Highlight the install to delete.
3. Click **Delete**.
4. Click **Save** when all changes have been completed.

To add an install to a pharmacy:

1. On the pharmacy record, select the **Installs** tab.
2. Click **Add**.
3. Enter data in the applicable fields.
 - a. **Install**: Select an option from the drop-down list.
 - b. **Serial Number**: The serial number from the install record will display and is not editable.
 - c. **Activation Key**: The activation key from the install record will display and is not editable. The activation key is used when installing ODS.
4. Click **Update**.
5. Click **Save** when all changes have been completed.

Click **Clear** to cancel editing or adding an install.

Security Templates

Security templates are pre-defined groups of security rights for the ODS, OPS, and ORC. Security templates are based on the user's role (e.g. Pharmacy Technician, Med Aide).

Searching security templates

Before viewing a security template, you must select the template you want to view. The following search parameters are available when searching templates.

Note: Required fields appear in **bold, black** text.

- **Template Name:** Select an option from the drop-down list.

The search results will sort by the Template Name column by default. Click any of the column headers to re-sort the results.

Viewing security templates

All security rights will display when viewing templates. Selected (checked) security rights are rights the template will grant access to the user. De-selected (not checked) security rights are rights the template will not grant access to the user.

A list of security rights and descriptions can be found in Appendix B (separate document).

Note: You can only grant and deny security right access when adding and editing users for security rights that you have been granted access to. For example, if you do not have security rights to fill canisters, then you cannot grant or deny the Fill Canisters security right when adding or editing users.

Users

Users for all three systems (ODS, OPS, and ORC) are setup and maintained the OnSiteRx® Pharmacy System.

Searching users

Before viewing or editing a user, you must select the user you want to view or edit. The following search parameters are available when searching users.

Note: Required fields appear in **bold, black** text. Although all parameters are optional, you must enter or select at least one search parameter.

- **ODS/MAR Username:** Enter one or more characters of the ODS/MAR username. The search results will include all users with an ODS/MAR username containing the characters entered.
- **OPS/ORC Username:** Enter one or more characters of the OPS/ORC username. The search results will include all users with an OPS/ORC username containing the characters entered.
- **Include Inactive:** Select **No** to search active users only or select **Yes** to search active and inactive users.

The search results will sort by the First Name column by default. Click any of the column headers to re-sort the results.

Adding, viewing, and editing users

The following fields display when adding, viewing, and editing a user unless otherwise noted.

Note: Required fields appear in **bold, black** text.

General information tab

- **Prefix:** Enter up to 25 characters.
- **First, Middle, and Last Names:** Enter up to 50 characters for each name.
- **Suffix:** Enter up to 25 characters.
- **ODS/MAR Username:** This is a system generated value when a user is added and is not editable. It is derived from the values entered in the first, middle, and last name fields. For example, if Jane and Doe

were entered in the first and last name fields, the username would be Jane Doe. If Jane, Beth, and Doe were entered in the first, middle, and last name fields, the username would be Jane Beth Doe.

- **OPS/ORC Username:** Enter up to 20 characters; the system will default the username with the first character of the first name followed by the first 19 characters of the last name.
- **User Type:** Select **Facility** when the user will not have access to the OnSiteRx® Pharmacy System. Select **Pharmacy** when the user will have access to the OPS (e.g. billing department, pharmacy staff, support, etc). The selection for this option drives the display of the Facility or Pharmacy Associations tab, enabling/disabling pharmacist centric fields, and enabling/disabling security rights.
- **Pharmacist:** Select **Yes** if the user is a pharmacist. Select **No** if the user is not a pharmacist.
- **Pharmacist Initials:** Enter 3 characters. This field is required when the selection for **Pharmacist** is **Yes**. This value is used to match the pharmacist initials on orders received from RNA Pharmacy Solutions (RNA).
- **FW RPh NPI:** Enter up to 10 characters; must be a unique value. This value is used to link the OPS user to the pharmacist in the pharmacy system.
- **Source:** This is a system generated value when a user is added and is used to differentiate users from the pharmacy system and users that are manually entered. This field is not editable.
- **Change Password:** Select the checkbox to change the user's password only when editing a user. When adding a new user, this checkbox will be disabled. Simply enter the user's password into the **Password** and **Confirm Password** fields.
- **Password:** Enter up to 12 characters. The password is applied to the OnSiteRx® Pharmacy (OPS) and OnSiteRx® Dispensing (ODS) systems, and OnSiteRx® Resource Center (ORC). The password requirements are:
 - Passwords must be at least six characters long but no more than twelve characters.
 - Passwords must contain at least one number and one letter.
 - Passwords cannot contain the OPS/ORC username or ODS/MAR username.
- **Confirm Password:** Enter up to 12 characters; the value entered must match the value entered for the **Password** field.
- **Title:** Enter up to 50 characters.
- **Security Question:** Enter up to 50 characters. This value displays when **Forgot Password** is clicked on the login screen.
- **Security Question Answer:** Enter up to 20 characters. This value is used to verify the answer provided when you click **Forgot Password** on the login screen.
- **Business Phone and Extension:** Enter up to 20 characters for the phone field and 10 characters for the extension field.
- **Other Phone and Extension:** Enter up to 20 characters for the phone field and 10 characters for the extension field.
- **Cell Phone:** Enter up to 20 characters.
- **Email:** Enter up to 255 characters and must be in an acceptable email address format (e.g. include "@").
- **Status:** Select **Active** or **Inactive**.
- **Locked Out:** The system will set this field to **Yes** when a user has unsuccessfully attempted to log into the system 5 or more times in a 24 hour period.

To unlock a user:

1. On the user record, select the **General Information** tab.
2. Select **No** for the **Locked Out** field.
3. Select the **Change Password** checkbox, if applicable.
 - a. Enter up to 12 characters in the **Password** field.
 - b. Re-enter the password in the **Confirm Password** field.
4. Click **Save**.

Pharmacy associations tab

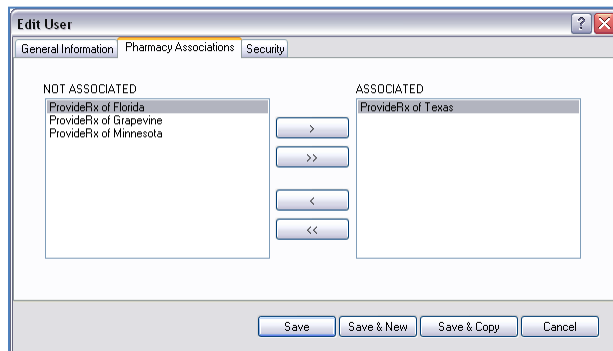
The Pharmacy Associations tab will enable when **Pharmacy** is selected for the **User Type**. At least one pharmacy must be associated to the user.

Note: Only pharmacies you are associated to will display in the boxes unless you have been granted the **Support User** security right, in which case, you will see all pharmacies. Pharmacies you are not associated to (given you do not have the **Support User** security right) will not display and you will not be able to associate them to the user you are adding or editing.

The sections below are written under the assumption that you do not have the **Support User** security right.

- **NOT ASSOCIATED:** The box on the left-hand side includes all pharmacies you are associated to but are not currently associated to the user you are adding, editing, or viewing.
- **ASSOCIATED:** The box on the right-hand side includes all pharmacies you are associated to and are currently associated to the user you are adding, editing, or viewing.

Figure 40: Pharmacy Associations tab of user record



To associate a pharmacy to a user:

1. On the user record, select the **Pharmacy Associations** tab.
2. Highlight one or more pharmacies in the box on the left-hand side.
3. Click the right-facing arrow button.
4. Click **Save**, **Save & New**, or **Save & Copy**.

To de-associate a pharmacy from a user:

1. On the user record, select the **Pharmacy Associations** tab.

2. Highlight one or more pharmacies in the box on the right-hand side.
3. Click the left-facing arrow button.
4. Click **Save**, **Save & New**, or **Save & Copy**.

***Tip:** Highlight multiple pharmacies by clicking with the mouse while holding down the **Ctrl** key on your keyboard. All highlighted pharmacies will move to the adjacent box when you click the appropriate button.*

Facility associations tab

The Facility Associations tab will enable when **Facility** is selected for the **User Type**. At least one facility must be associated to the user.

***Note:** Only facilities assigned to the pharmacies you are associated to will display in the boxes unless you have been granted the Support User security right, in which case, you will see all facilities. Facilities assigned to pharmacies you are not associated to (given you do not have the Support User security right) will not display and you will not be able to associate them to the user you are adding or editing.*

The sections below are written under the assumption that you do not have the Support User security right.

- **NOT ASSOCIATED:** The box on the left-hand side includes all facilities assigned to the pharmacies you are associated to but are not currently associated to the user you are adding, editing, or viewing.
- **ASSOCIATED:** The box on the right-hand side includes all facilities associated to the pharmacies you are associated to and are currently associated to the user you are adding, editing, or viewing.

To associate a facility to a user:

1. On the user record, select the **Facility Associations** tab
2. From the **Corporation Name** drop-down, select the corporation or select **All**.
3. Highlight one or more facilities in the box on the left-hand side.
4. Click the right-facing arrow button.
5. Click **Save**, **Save & New**, or **Save & Copy**.

To de-associate a facility from a user:

1. On the user record, select the **Facility Associations** tab
2. From the **Corporation Name** drop-down, select the corporation or select **All**.
3. Highlight one or more facilities in the box on the right-hand side.
4. Click the left-facing arrow button.
5. Click **Save**, **Save & New**, or **Save & Copy**.

***Tip:** Highlight multiple facilities by clicking with the mouse while holding down the **Ctrl** key on your keyboard. All highlighted facilities will move to the adjacent box when you click the appropriate button.*

Security tab

Security templates are pre-defined groups of security rights for the ODS, OPS, and ORC. Security templates are based on the user's role (e.g. Pharmacy Technician, Med Aide). You can assign security rights to a user by selecting a security template (and customizing as needed) or selecting each security right manually (without first selecting a security template to populate the security rights).

To apply a security template to a user:

1. On the user record, select the **Security** tab.
2. Select an option from the **Template Name** drop-down.
3. Click **Update**.
4. Click **Save**, **Save & New**, or **Save & Copy**.

To customize security rights for a user:

1. On the user record, select the **Security** tab.
2. Select (grant) and/or de-select (deny) the desired security rights.
3. Click **Save**, **Save & New**, or **Save & Copy**.

Note: *You can only grant and deny security right access when adding and editing users for security rights that you have been granted access to. For example, if you do not have security rights to fill canisters, then you cannot grant or deny the Fill Canisters security right when adding or editing users.*

Reports Menu

All data driven reports (dispense, system access, setup, etc) are accessed through the ORC. Reports that are generated and automatically saved in OPS will display under the **OPS > Reports** menu.

Manifest (Facility)

The system will open a Windows Explorer window to the save path directory of the Canister Shipping Manifest (to facility).

Manifest (Pharmacy)

The system will open a Windows Explorer window to the save path directory of the Canister Shipping Manifest (to pharmacy).