

PAR EXCELLENCE SYSTEMS

PAR Client

USER GUIDE



PAR Excellence Systems
11500 Northlake Drive
Cincinnati, OH 45249
800-888-7379

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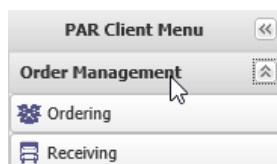
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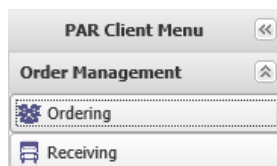
General Information

Navigation

Moving from function to function and making selections is the same as any other web page with which you are familiar. Basically, you point and click with the mouse. For example, to expand the Order Management menu, put the mouse pointer on **Order Management** and click.



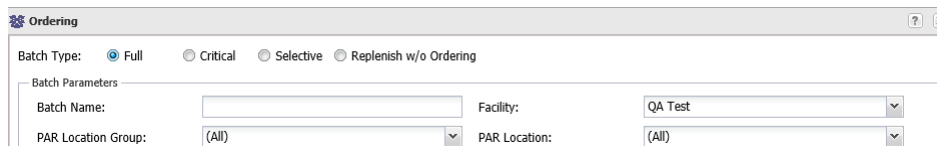
In addition to the standard point and click navigation, PAR Client has been built to allow for a high degree of navigation using the keyboard. In the picture above, notice the outline around the arrows icon  on the Order Management line. This outline means that this control on the screen has focus. If you press the **Tab** key on the keyboard, the focus will move to the next logical control on the screen.



If you try that, you will see the focus outline switch to the Ordering line.

If you press the **Enter** key the system will perform the same action as if you clicked on the control with focus (in this case, it will open the Ordering screen).

Once one of the application screens is displayed, the same navigation techniques are available. Point and click or keyboard navigation. When using keyboard navigation on the application screens, some of the controls may be part of a grouping. For example, the Full, Critical, Selective and Replenish w/o Ordering controls in the screen below are a group (because only one can be selected).



If one of the controls in the group has focus and you press the **Tab** key, the focus will move to the next control outside of the group. Move between the selections in the grouping using the **arrow** keys on the keyboard.

You can move through the other controls on this screen (Batch Name, Facility, PAR Location Group, etc.) using the **Tab** key and the focus will move from left to right, top to bottom through the controls on the screen.

Data Entry Fields

The PAR Client system uses a variety of standard data entry controls. Each control is a combination of a label and a data entry control. For example, the control below is a text box where you enter the vendor item number for an item.

Vendor Item No:

When you are entering data on a blank form, PAR Client will prompt you for the required fields but framing the data entry control with a red box. These fields must be completed with valid data before you can save the information. For example, a required text box will appear like the control below.

Item Number:

Data Entry controls

Text box used to enter free form data for the field.

Dropdown box to select from a list of values. Click the arrow on the right to see the list of available values.

Numeric edit box that requires a numeric value. Click in the box and type a number or use the up/down arrows on the right to increment or decrement the value in the box.

Date box used to capture a valid date. You can click in the box and type a date in the format MM/DD/YYYY or you can click the calendar icon in the right side of the box to open a calendar and you can select the date from the calendar.

Full Critical Selective

Radio buttons allow only one of the buttons to be selected. Click on the desired selection to select the value (and deselect the previously selected value).

Location Name

Check box to select or deselect a single option.

Buttons to perform an action. Click the button to perform the desired action. Most buttons also have one of the letters underlined. If you hold the **Ctrl** key and press the key for the underlined letter, it is the same as clicking the button.



Help button (top right of the screen). Click this button to get help on how to use the screen you are currently working on.



Exit button (top right of the screen). Click this button to exit the current screen. If you have made any changes on the screen they will be lost (although the system will warn you before simply discarding the updates).



The application screens are moveable. If you hover the mouse in the title bar of the screen the four directional arrows will appear . Click and hold the mouse button down and then you can drag the application screen to another area of the window.

Be careful that you do not drag the title bar off the viewable page area of the window or you will be unable to move it back into the viewable area.

Grid Control

Whenever PAR Client displays a formatted list of data it is displayed in a grid control. A sample grid control is shown below.

Item Number ^	Description	Item Type	PAR Level	Critical	On Hand	UM	Modified
0465504	LABEL PINK PATIENT RECORD	PAR Bin	10	3	10	RL	07/18/2017
0701055	LABEL LAB RED STRIPE FOR ER	White Label	10	2	10	RL	05/31/2017 ^
1002	NEEDLE ZIT GUIDE	White Label	10	0	10	BX	03/29/2013
1002A	Needle Kit Guide A	White Label	10	0	10	EA	05/23/2017
1003	QUIK-COMBO RTS	White Label	10	0	10	EA	07/11/2017
1004	ENERGEN ICD	White Label	8	0	8	EA	01/30/2015
1005	ADULT SPO2 ADHESIVE SENSOR	White Label	10	0	10	EA	07/11/2017
1007	EDOTAK RELIANCE	White Label	20	0	20	EA	03/07/2016
1008	Micro-Introducer Kit	White Label	10	0	5	EA	06/26/2017
1009	DuraFlow 28cm	White Label	10	0	10	EA	12/06/2016
1010	GLIDEWIRE .035"	White Label	10	0	10	EA	08/18/2014 v
1011	Micro-Introducer Kit 5F	White Label	10	0	10	EA	02/10/2017 v

Features of the Grid control

Right Click

1003	QUIK-COMBO RTS	Add
1004	ENERGEN ICD	Edit
1005	ADULT SPO2 ADHESIVE	Adjust
1007	EDOTAK RELIANCE	Move
1008	Micro-Introducer Kit	Delete
1009	DuraFlow 28cm	

When making a selection from one of the grids you can click on the desired row to highlight the row and then click one of the buttons below the grid.

Alternately, you can **right-click** on the row (point at the row and press the right mouse button) and it will highlight the row and display the available options in a small pop-up menu. Move down to the desired action and click to perform that action.

Scroll Bar

The scroll bar is on the right side of the grid.

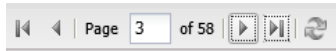
Click the down arrow at the bottom v to scroll down one item in the list or the up arrow at the top ^ to move scroll up one item.

You can also click the light area below the dark area of the scroll bar to page down or the light area above the dark area to page up.

Click on the dark area of the bar and hold the mouse button down and then move the mouse up or down to scroll to any desired spot in the list.

Paging

Many grids are populated in "pages" to improve performance and system stability. At the bottom of the grid there is information about the paging of the grid.



Displaying 101 - 150 of 2896



Column Headings

On the bottom left you see which page is displayed and the total number of pages. The arrows on the left and right are used to move to the next (or previous) page. The arrows to the far left and right will take you to the last page or to the first page. The double-arrows on the far right will refresh the screen.

The information on the right side of the screen displays the record numbers currently displayed and the total number of records in the search results.

The headings in the grid identify the data in this column of the list.

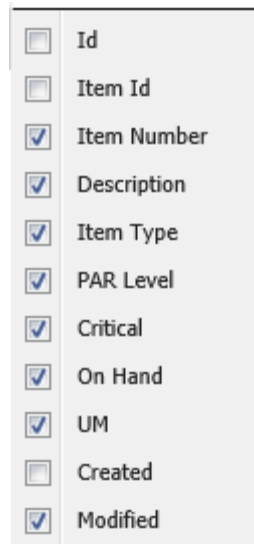
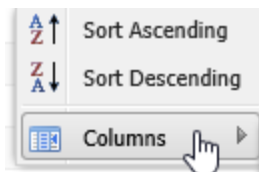
Click on any column heading to sort the list by the data in the column. The current sort order and direction is indicated by the heading with the sort indicator.

The sort indicator also indicates the current direction of the list. If the arrow is pointing up , the list is ascending. If the arrow is pointing down , the list is descending.

Select Columns



Hover the mouse pointer on any column heading to expose a dropdown arrow on the right side of the column heading. Click on the arrow to see additional options. Then click on Columns.



This will display a list of all the columns that are available to be displayed in this grid. The fields that are checked are already displayed and the unchecked fields are available to be added to the grid.

You can also uncheck any of the items that are already displayed if you aren't interested in seeing those items in the list.

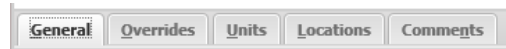
Any changes you make will be saved in your user profile so the grid will reflect your changes the next time you use PAR Client.

Other users will continue to see the grid with the default setting or with any modifications they have made for themselves.

Tab Control

When the information managed by an application function is too much to fit neatly on one screen, PAR Client will display the data using a tab control. Each "tab" contains a subset of the data. The information displayed on each page of the tab control is related to the other data on the page.

Below is the tab control that is used to capture/display the Item master information. Click on a “tab” to display or maintain the fields on that page.



If one of the “tabs” has focus, which is indicated by a faint rectangle around the caption, you can move to the next or previous “tab” using the arrow keys on the keyboard (pressing the tab key on the keyboard will take you to the first data entry field on the currently displayed page).

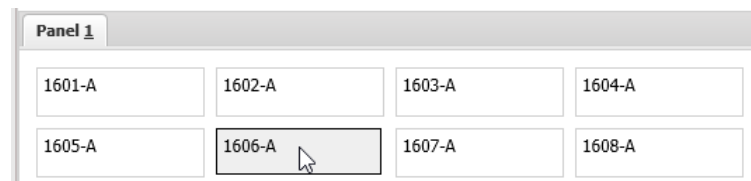
You can also hold down the Ctrl key on the keyboard and press the letter that is underlined in the caption to display the information on that page. For example, in the example above, hold the Ctrl key and press the letter “o” to see the Overrides page.

When entering new information into the system, there may be required fields on multiple pages of the tab control. If you have completed all the fields on the page that is displayed but the Save button is still disabled, click through the other pages on the tab control to find other required fields that need to be entered before you can save the data.

Drag and Drop Control

This is a specialty control that is only used on functions that are used to maintain the beds on a display board (PDB Locations and Virtual Display Locations). After you have entered the bed names on the display board you can move the beds around the display board using “drag and drop”.

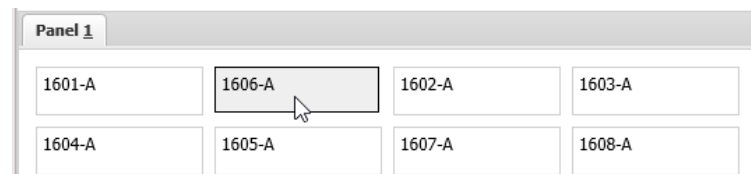
“Drag” a bed by clicking a bed name and hold down the mouse button.



Then start moving the mouse to where you want to “drop” the bed. As you move around the screen the drag icon will change from a green check to a red circle as you pass over places where you can or cannot drop the bed.



When you have reach the spot where this bed name should be placed, let go of the mouse button and the bed will be put in that spot and all beds after it will be moved down a spot.



Order Management

Order Management Overview

The functions in this section are used to build and manage the replenishment orders for the point-of-use supply locations.

Ordering – Use this to build an order for supplies needed to restock the supply location. The function will give you options to bring all items in the location back up to a specified stock level or just those items that are below a specified critical stock level or you can pick and choose the items and quantities to be put on the order.

Receiving – Once the items on an order have been delivered to the supply location use this function to tell the system the exact number of each item that was delivered and close out the order so the system knows all items have been delivered.

Transfer Inventory – You can use this function if only a few items in the supply location are running low and you know there is excess of the same items in a nearby supply location. Using this function you can simply move items from one location to another.

Requisitions – The system includes functionality that lets you manually tell the system the quantity of the item you want to restock in the room (rather than having the system keep track of the inventory level for you). This functionality is generally used for low cost items with a high stock level. For example, if you stock paper cups in the supply room, you might want to simply tell the system to replenish another case of cups when you notice the number of cups is starting to get low. This function will show you those items that have been manually requisitioned.

Order Search – Use this function to view and maintain the replenishment orders that have been generated by the system.

Ordering

When the inventory level of an item has fallen below a predetermined optimum stock level you can request additional stock for the item to be delivered to the supply location by building an order.

When you build an order the system gives you a few options to indicate which items in the supply location should be considered as candidates to be ordered (if necessary). Select the type of order you want to generate from the options below.

- **Full** – A full order will look at every item in the supply location and compare the current inventory level to the optimum stock level (also known as the PAR Level), as well as, the re-order point for the item and determine if the item should be placed on the order. For example, if the PAR Level for an item is 20 and the re-order point is 10 and the current stock level is 5, the item will be put on the order for a quantity of 15.
- **Critical** – This option lets you build an order for only those items in the location that are at, or below, the critical level. When you use this option if an item is below the re-order point but not yet at the critical level, it will not be included on the order. This option is typically used to generate a very small

order at the end of the day to replenish the items that are critically low to avoid a potential stock-out situation before the next full order run in the morning.

- **Selective** – You can use this option to manually build an order for any, or all, items in the supply location, as well as, specify your own quantities to be ordered.
- **Replenish w/o Ordering** – This option allows you to replenish the supply location without generating an order. You might use this if, for example, your normal orders are sent to a JIT vendor but you have some surplus stock that you want to use before sending an order to the vendor. Ordering in this manner does NOT actually create an order (as the name implies) but it will let you generate a pick ticket if you want and it creates transactions in the system the same as if an order was received. These transactions in the system can be important because several of the PAR Vision reports calculate usage based on the stock received on the orders.

Order Batch Parameters

Batch Name – When building orders, a separate order will be built for the combination of PAR Location and Replenishment Source. You can use this field to (optionally) assign a name to all orders generated in the same order build run. This may help you organize and track your orders. You can display this information on the Order Search and Receiving screens.

Facility – If you have access to more than one Facility, you must identify the Facility for which you are placing this order.

PAR Location Group – A PAR Location Group is a convenient way to group together several supply locations that will all place orders at the same time (for example, all the supply locations on the 3rd floor). Refer to the [Location Groups](#) function for more information on setting up groups.

PAR Location – If you want to place an order for the items in a single supply location, you must specify the location. It is generally a good practice to select either a PAR Location Group or a single PAR Location when building an order otherwise you risk building a very large order to replenish every location in your facility.

Replenishment Type – There are two replenishment types; internal and external. Internal replenishment sources are generally located within the hospital (such as, a storeroom). External replenishment sources are usually vendors from whom you order specialty items that you don't want to stock in the storeroom.

Replenishment Source – You can limit the order to only the items replenished from a specified source. For example, you may want to build an order for only your JIT vendor at this time.

Fill From Alternate Source – If the items being ordered (based on other criteria above) are normally replenished from a specific source but you want this order to go to a different source, you can specify that here. There are a number of ways this can be used, for example, if you want to replenish based on a different replenishment source percentage. Contact PAR Excellence Technical Support for additional information.

Additional Estimated Usage (Days) – You can use this to over order based on the average daily usage of the items being ordered. You can use this going into a long holiday weekend if you know your vendor is going to be closed one or more days. It can also be used if a natural disaster (such as a hurricane) is predicted that will surely disrupt the supply chain.

Full Orders

After making your selections for the [Order Batch Parameters](#), click the **Next** button on the bottom of the screen. The system will let you further specify the following options.

Include Item Type – Select the type of items to be included on the order.

- **White** – These are items that have the inventory level automatically managed by a caregiver touching an iButton or scanning a barcode each time an item is used.

- Blue – These are items that have the inventory level managed automatically by a PAR Bin scale or the user manually tells the system how much inventory to order (through one of the system's requisitioning capabilities).
- Both – All items should be considered when building the order (recommended).

Build Options – Select the degree to which you want the order built.

- Build and Extract – The orders are built and sent directly into the extract process. The extract process is what actually “sends” the order. The way an order is extracted is determined by the replenishment source. In general, the extract process will either print a pick ticket or it will send an order file to the hospital MMIS system.
- Build Only – This option can be used to build the orders without sending them directly to the extract process. Using this option you have the ability to review each order and even make changes prior to “sending” them. Although this may appear to be a safer option, it can be time consuming since you now have to manually extract the orders using the Order Search function.

After making your selections on the options screen, click the **Next** button at the bottom of the screen to proceed to the [Order Batch Summary](#) screen.

Critical Orders

After making your selections for the [Order Batch Parameters](#), click the **Next** button on the bottom of the screen. The process flow and options for a Critical Orders run is the same as a [Full Orders](#) run. Refer to that section of this documentation for a full explanation of the options.

The difference between a Full Orders run and a Critical Orders run is the set of items that are considered as candidates to be ordered. The full order run will order anything (matching the Order Batch Parameters) where the current inventory level is below the re-order point. A critical order run will only order items where the current inventory level is below the specified critical Level for the item.

Include Item Type – Select the type of items to be included on the order. White – Blue – Both.

Build Options – Select the degree to which you want the order built. Build and Extract – Build Only.

After making your selections on the options screen, click the **Next** button at the bottom of the screen to proceed to the [Order Batch Summary](#) screen.

Selective Orders

The process flow for a Selective Orders run is quite different from that of the Full Orders and Critical Orders. The Selective Orders process will let you manually select any item (matching the specified Order Batch Parameters) to be included on the orders. You also have full control of the quantity to be ordered.

Building a Selective Order is a two-step process. The system first lets you select items that most likely need to be ordered based on some criteria. Secondly, you can manually add any additional items that you would like to include on the order.

Step One

After making your selections for the [Order Batch Parameters](#), click the **Next** button on the bottom of the screen. The system will display a screen showing all items matching the Order Batch Parameters that are “at or below reorder point”. These are the items that would naturally get ordered if you did a full order.

This screen also gives you a few other options for selecting items based on the current inventory level. The options available are:

- At or Below Critical Level – Select this option to see all items that would naturally get ordered on a Critical Order run.
- At or Below Reorder Point – This option shows the items that would be ordered on a Full Order run.

- Below PAR Level – Use this option to select items with a current inventory level that is below the PAR level specified for the item.
- Above PAR Level – This option is useful if you want to do a negative Selective Order to send overstocked inventory back to the storeroom.

The items matching the selection criteria are displayed on the screen. You can click the **Include** box on the left for any item to be included on the order. The screen also includes a **Select All** on the bottom so you can easily select all items that are displayed. There is also a **Deselect All** button if you want to clear the Include boxes and start over.

After you have checked the Include box for all the desired items, click the **Next** button at the bottom of the screen.

Step Two

The system now displays a screen where you can manually add any other item to the order. Click the **Add Item** button on the bottom of the screen to open an item search screen. Enter an **Item Number** or **Item Description** and click the **Search** button to see the items matching the search criteria.

When you see the item you want to add to the order, click on the item (to highlight the row) and then click the **OK** button.

The item will be placed on the order. The default quantity used for the order is the difference between the current on hand and the PAR Level (without considering anything already on order). If on hand is already at or greater the PAR level it will add it with a quantity of 1.

You can now change the quantity to be ordered for this item if you want. To change the quantity double click on the **Quantity** (or click once and press the Enter key). This will open up a numeric edit box and you can enter a number or use the arrows to increment the number up or down.

Item Description	Quantity	UM
BD Insyte AutoGuard	6 X	EA

Update Cancel

To save the new Quantity, click the **Update** button.

To add another item to the order click the **Add Item** button and repeat the process outlined above.

After you have added all the additional items to the order, click the **Next** button at the bottom of the screen to proceed to the [Order Batch Summary](#) screen.

Replenish w/o Ordering

After making your selections for the [Order Batch Parameters](#), click the **Next** button on the bottom of the screen. The process flow Replenish w/o Ordering is the same as [Selective Orders](#). Refer to that section of this documentation for a full explanation of the process.

The difference between Selective Orders and Replenish w/o Ordering is that an order is not actually created when you do Replenish w/o Ordering. The system simply creates the necessary receipt transactions to account for the inventory usage.

The two steps in the process are the same as a Selective Order.

- First, add items to the order based on the current inventory level compared to PAR Level, Re-Order Point or Critical Level.
- Second, manually add additional items to the order as desired (and modify the quantity if desired).

After you have completed both steps, click the **Next** button at the bottom of the screen to proceed to the [Order Batch Summary](#) screen.

Order Batch Summary

The last screen of the ordering process is the same no matter what type of order you are building. The Order Batch Summary screen is a very important step in the process because this is where you can review all your selections and, if you agree that this is the batch of orders that you want to build, you click the **Submit** button to start the order build and extract process.

If you notice something on the summary screen that doesn't appear to be correct, this is your last chance to click the **Previous** button to make changes or the **Cancel** button to simply end the program without doing anything.

The information displayed on the summary screen includes:

- Batch Type – The type of batch (Full, Critical, Selective or Replenish w/o Ordering).
- Batch Name – The name you assigned to the batch or (None) if you did not assign a name.
- Facility – The facility for which this batch is being built.
- Location Group – The name of the group of locations selected or (All) if no group was selected.
- Location – The name of the location selected or (All) if no location was selected.

*If both Location Group and Location are (All) you will be building orders for **ALL** locations at the facility. If you are not sure this is what you want to do, you should **NOT** proceed with creating this order batch.*

- Replenishment Type – Internal or External or (All) if no Replenishment Type was selected.
- Replenishment Source – The replenishment source selected or (All) if no source was selected.
- Fill From Alternate Source: The alternate source selected or (None) if you are using the standard source for the items being ordered.
- Include Item Type – (Full and Critical only) White or Blue or both White and Blue Label items.
- Build Option – (Full and Critical only) Build and Extract or Build Only.
- Items Selected – (Selective and Replenish w/o Ordering only) The number of items selected on the order based on current inventory level ([step one](#) described above).
- Additional Items Included – (Selective and Replenish w/o Ordering only) The number of items on the order that were manually added as additional items ([step two](#) described above).

Selective Orders and Replenish w/o Ordering orders always go through both the Build and Extract phases of the process since you have already had the chance to review the order as it was being built.

Receiving

The Receiving function is used to complete the ordering process once the order has been filled. This is an important step so the system does not consider this as an outstanding order at the next order build.

When you select the Receiving function from the menu you will see the receiving search screen. If you know you only have a few open (unreceived) orders, you can simply select the **Facility** for the order to be received and click the **Search** button to see all the open orders and look for the order to be received.

You can also enter additional criteria on the search screen to limit the number of orders from which to choose.

Facility – If you have access to more than one Facility, you must identify the Facility for the order being received.

Replenishment Source – If you know the replenishment source where the order was sent, you can select the source to show only the orders sent to that source.

PAR Location – Select the supply location for the order being received.

Order Number – If you know the exact order number being received you can enter the number to see just that order.

After you have entered your search criteria, click the **Search** button and the open orders matching your search criteria will be displayed. Locate the order that you want to receive and click on the order to highlight the line.

Adjust Order

Use this function if you want to receive any of the order line items for a quantity different from what was originally ordered. It is not uncommon for the quantity received for an order line item to be different from what was ordered. This can happen for a number of reasons but most commonly the source from which the item was ordered simply doesn't have enough stock on hand to fill the entire order.

With the order highlighted on the receiving search screen, click the **Adjust** button (or you can press the Enter key). This will display the Receive Order adjustment screen. The system pre-fills the Received column with the quantity that was ordered (making the assumption that most, if not all, line items will be received in full).

Check each quantity value versus the actual quantity received for the item. If there are any discrepancies (i.e., you received less than what was ordered or more than what was ordered) double-click on the Received box to be change (or you can click once in the box to highlight the box and press the Enter key). The system will open up a numeric edit box and you can type the quantity received or use the up or down arrows until you reach the number that was received.

Once you have entered the number you want, you can press the Enter key or click in another box to close the numeric edit box. If the value in the Received box now doesn't match the number in the Pending box (which is what was ordered) the number will turn red (so you know it has been changed).

If many of the quantities on the order must be adjusted, you can open the numeric edit box (as described above) on one of the lines and then press the Tab key to move from line to line. On each new line the system will automatically open the numeric edit box for you. This can save a lot of keystrokes and time.

Once all the numbers in the **Received** column match what you actually received for each item, you can click the **Save** button to receive the order.

Backorders

If your system is setup to allow backorders for the replenishment source, the Receive Order adjustments screen will contain a Backordered column, as well as, the Received column.

If you reduce the number in the Received column, the difference between Received and Pending is put in the Backordered column. You can now leave that quantity in the Backordered column or you can change the value if you do not want to backorder that many (or change it to zero if you don't want to backorder any).

When you Save the order, if any non-zero values are in the Backordered column the items that have been indicated as received will be closed off the order and the order will be saved in **Receiving** status pending the receipt of the backordered items. This order will continue to appear in the open orders list.

When the backordered items are finally delivered, you can perform the Receiving function again on this order to receive the backordered items and close the order.

Receive Tracking Items

The PAR Excellence system allows you to track **expiration date** and **lot number** for items which require that information to be tracked. If you define items like this the system can tell you the items in your supply locations that will expire soon (or are already expired) and the items that carry a specified lot number. This

can be very useful for keeping track of your perishable inventory or when looking for items in a lot that has been recalled. In order to track this information, however, the system needs to know the expiration date and lot number of every item received into inventory. We refer to this as **additional tracking information**.

If an item on the order requires additional tracking information, the Receive Orders adjustments screen will include a **Tracking** column and there will be a red box around the Received and Tracking columns for those item(s).

Item Number ^	Item Description	Vendor Item No	Location Name	UM	Pending	Received	Tracking	Backordered
10097	BLOOD PUMP PU VALVES	P25P-001	1 WEST	EA	2			

Click in the **Received** column and press the **Enter** key to display a pop-up screen where you can enter the additional tracking information. The Item Tracking Information screen shows you the Order Quantity and Total Received (so far) and a spot to enter the additional information required with a quantity.

Enter the **Expiration Date** and **Lot Number** and how many items you received that match that information (one shipment may have items with different dates and /or different lots) then click the **Update** button.

If your workstation is configured with a scanner you can scan the Expiration Date and Lot Number off the manufacturer's package. Contact PAR Excellence Technical Support for more information about supported scanners and configuring the scanner.

A new empty line will appear to let you enter the tracking information for the remaining items. Once you have entered the tracking information for all the items in the shipment, click the **OK** button on the bottom of the pop-up screen.

*You will get a warning if the Total Received is less than Order Quantity. You can either click **Yes** (this is what I want to do) or **No** and the system will go back to the pop-up screen to let you enter more information.*

Once you have completed entering the Item Tracking Information, the Receive Orders adjustment screen will be redisplayed with the Tracking column checked ✓.

You can now proceed to the next item or, if you are done, click the **Save** button to receive the order.

Receive Order

The previous section of this document describes in detail the process of receiving an order with or without making any adjustments after displaying the Receive Orders adjustments screen. There is also a **Receive** button on the Receiving search screen.

If you are certain that all items on an order are to be received in full, you can simply highlight the order on the Receiving search screen and click the **Receive** button. You will be prompted if you want to receive the order in full. If you acknowledge the prompt by clicking **Yes**, all the items on the order will be received for the quantity ordered (or still pending if this is a backorder) and the order will be closed.

If the order contains items that require additional tracking information you cannot receive the order using this method. You must use the [Adjust Order](#) screen so you can enter the Tracking information (see [Receive Tracking Items](#)).

Transfer Inventory

This function can be used to move inventory from one location to another. This can be useful if you start running low on stock for an item in one room but have excess in another.

If you are using the PAR Excellence weight based system, it is not absolutely necessary to do an inventory transfer when you move inventory from one room to another. Since the quantity-on-hand is calculated automatically based on weight, both locations will report the correct inventory level when you move stock even if you do not use Transfer Inventory. It is important, however, if you are using the PAR Vision reporting tool to track usage and compliance. The Transfer Inventory function creates important transactions that are used to calculate these metrics.

To start the Inventory Transfer you must select the location and item from which the inventory is being removed.

Facility – If you have access to multiple facilities, you must identify the facility where the supply location is located.

From PAR Location – Use the dropdown list to find and select the supply location from which you are removing the stock.

Item Number – This field can be used to search for the item being transferred. You will identify the exact item to be transferred by selecting it from the grid (below). Generally, it is easiest to just click the **Search** button after selecting the From PAR Location and then scroll down to find and select the item. If you want to use this field to search for the item, you can enter all, or part, of the item number then click the **Search** button.

Item Description – This field is used the same as Item Number (above) but it lets you search by some, or all, of the item description. Enter the description for which you want to search and click the **Search** button.

After clicking the Search button the list of items matching your search criteria will be displayed in the grid. Find the item being transferred and click on it to highlight the line, then click the **Transfer** button.

The main Transfer Inventory Item screen gives you information about the Item selected to be transferred and the location from which it is being transferred. It also shows you the current quantity-on-hand for the item at that location.

On this screen you will further specify the following information.

Transfer To – PAR Location – This is the supply location to which you are moving the inventory. Make your selection from the dropdown list which will contain only locations where this item is stocked (not including the From PAR Location from which are moving the inventory).

After you select the location to which you are moving the inventory, the system will tell you the current quantity-on-hand for the item at that location. You now know the QOH at the From Location and the To Location and you can decide how much stock you want to move.

Quantity to Transfer – Enter the quantity and unit of measure you are going to move. After you make your entry, the system will show you the **Updated Qty** in each location.

If all the information looks correct, click the **Save** button to complete the transaction.

Transfer Tracking Items

If you are transferring an item that requires additional tracking information (expiration date and lot number) the system will require you to identify the specific expiration date and lot number on the stock being moved. This information is needed to keep track of where that inventory is located in the hospital.

When you transfer one of these items, the system will show you a list of the dates and lot number currently stocked at the From Location. Click in the **Transfer Qty** box corresponding to the Expiration Date and Lot for the items being moved and enter the quantity that has that date/lot then click **Update**.

Expiration Date ^	Lot Number	Current Qty	UM	Transfer Qty	Remaining Qty
04/01/2020	20534508	2	EA	<input type="text" value="2"/>	2
06/01/2020	20534508	8	EA	<input type="text" value="0"/>	8

Update Cancel

If there is additional stock being moved that has a different expiration date and lot, move to that line on the screen and enter the quantity with that tracking information.

After you have entered the total quantity of the stock being moved, click the **Save** button to complete the transaction.

Requisitions

The system includes functionality that lets you manually tell the system the quantity of the item you want to restock in the room (rather than having the system keep track of the inventory level for you). These requisitions are typically created using a touch probe or scanner. For example, you will scan the item number and enter the number you want replenished to the room. When the information in the scanner is transferred into the PAR Excellence system, the system will create a Requisition for the item(s) scanned.

Talk to your PAR Excellence Account Manager about the various touch probe and scanner options available from PAR Excellence.

After selection this function from the menu you must select the **Facility** for the requisitions you want to edit or add (if you only have access to one Facility the system will automatically select that facility for you).

All the outstanding requisitions for the selected facility will be displayed. If you want to work with a subset of the requisitions you can make selections from the dropdown lists in the Filter Criteria and the list will automatically be updated to match the criteria.

Facility – The facility for the requisitions.

PAR Location – Select a supply location if you only want to work with the requisitions for a specific location.

Replenishment Type – Select Internal or External to work with requisitions for only that type of source.

Replenishment Source – Select a replenishment source if you only want to work with the requisitions for a specific source.

The entries displayed on the screen are those requisitions which have been entered into the system either using this utility or through a touch probe or scanner and have not yet been included on an order.

The functions you can perform on this screen include:

Add – Manually create a new requisition for an item (that currently does not have an outstanding requisition).

Edit – Change the quantity requisitioned for one of the items on the screen.

Delete – Remove the requisition for an item.

Once the requisition has been added to an order it will be removed from this screen. If you delete the order before it is received and closed, you will have to option to reinstate any requisitions that were on the order and if you choose Yes, the requisitions will be put back on the screen (until the next order run which would remove them again).

Add Requisition

To add an item to the Requisition screen, click the **Add** button.

The system will display a screen where you can search for items that are eligible to be requisitioned. Items that can be requisitioned are **Item Type = Blue** and **PAR Bin Item = unchecked**. Refer to the documentation for [Item Locations](#) for more information about how to set the item indicators.

On the Select Requisition Items screen you can specify the following search criteria.

Facility – If you have access to multiple facilities, you must identify the facility for the items to be requisitioned.

PAR Location – You can use the dropdown list to search only for items in a specific location.

Item Number – This field can be used to search for the item being requisitioned. You will identify the exact item to be requisitioned by selecting it from the grid (below). If you have selected a specific PAR Location it is generally easiest to just click the **Search** then scroll down to find and select the item. If you want to use this field to search for the item, you can enter all, or part, of the item number then click the **Search** button.

Item Description – This field is used the same as Item Number (above) but it lets you search by some, or all, of the item description. Enter the description for which you want to search and click the **Search** button.

The eligible items will be displayed on the screen. Locate the item to be requisitioned and click on the item to highlight the line then click the **OK** button. The **Add Requisition** pop-up screen will be displayed where you can enter the **Quantity** of the item to be requisitioned.

There are system options that determine how quantities are entered when building a Requisition using a touch probe or scanner but those options do not apply to this utility.

When manually adding requisitions using this function the requisition quantity is always the number of items you want replenished (not what is currently on-hand) using replenishment unit of measure.

Edit Requisition

To change one of the requisitions displayed on the screen, click on the requisition to highlight the line then click the **Edit** button.

The **Edit Requisition** pop-up screen will be displayed where you can change the **Quantity** of the item to be requisitioned. See [Add Requisition](#) for notes on how to enter the requisition quantity correctly.

Delete Requisition

To remove one of the requisitions, click on the requisition to highlight the line then click the **Delete** button.

A **Confirm Delete** pop-up box will be displayed and you can click **Yes** to complete the process and delete the requisition.

Order Search

The Order Search function lets you view and work with the previously built orders. What you can do with the order depends on the status of the order. The Order Status is displayed in the last column of the grid. Order Status' and their meanings are:

- **Built** – This is an open order that was built but has not yet gone through the extraction phase of the process. Orders with this status can be freely changed.
- **Extracted** – This is an open order that has already been processed by the extraction phase of the process. For example, a pick ticket might be printed so the items can be picked in the storeroom, or an interface file is built and sent to the hospital MMIS system to be sent to the vendor. Although you

can still make changes to the order when it is in this status, you may have to coordinate those changes with other people (or systems) who are already working to fulfill the order.

- **Receiving** – This is an open order that has gone through the extraction phase and some of the items contained on the order have already been received and replenished in the supply location. These will typically be orders with backorders. You can only make changes to line items that have not yet been received.
- **Backordered** – This is an open order that has gone through the extraction phase and *all* the lines on the order have been backordered.
- **Closed** – This is a closed order. All the line items have been received (or killed) and there is nothing left to do with the order. No changes can be made to a closed order.
- **Deleted** – This is an order that was deleted from the system. No changes can be made to a deleted order and if you View the line items it will be empty because all the line items are deleted when the order is deleted. The Modified time on the View screen will tell you when the order was deleted.

The actions that are available to you through this function are:

- **View** – Look at the items that were included on an order. If the order is still open (Build, Extracted, Receiving or Backordered) you can change the quantity ordered for any items on the order that have not yet been received.
- **Print** – Generate a printout of the order.
- **Extract** – Send the order through the extraction process. You will use this function for an order that is in Built status when you are ready to release the order to be fulfilled. You can also use the function for an order in Extract status to re-send the order through the extraction process. This is useful if a pick ticket got lost or destroyed or if an interface did not make it to its destination due to a system failure.
- **Delete** – Delete the order. The order header is not deleted so you have an audit trail that the order was created and also the date/time it was deleted. All the line items from the order will be removed from the system.

An order in Receiving status has already had some line items received into the supply location and, therefore, cannot be deleted. An order in Backordered status has not had any effect on the inventory so the entire order can be deleted.

*If you want to ignore the rest of an order that is in receiving status (i.e., because you know the backordered items will never be fulfilled) use the [Receiving](#) function and **Kill** the order.*

Edit Order

The quantity ordered for line items that have not yet been received can be edited using the **View** function from the Order Search screen.

To change a quantity, double click on the **Pending** box for that line item (or click once and press the Enter key). This will open up a numeric edit box and you can enter a number or use the arrows to increment the number up or down.

Change the Pending quantity to zero to remove the line item from the order.

After you have made all your changes click the **Save** button to save to order and return to the Order Search screen.

Item Management

Item Management Overview

The functions in this section are used to manage the inventory items in the system and the supply locations.

Items – This function is used to setup the inventory items. Before you can tell the system the supply locations where you want to stock an item, the item itself must be defined.

Replenishment Sources – A replenishment source is where orders are sent to be fulfilled. A replenishment source can be internal to the hospital, like a storeroom, or it can be external, like a vendor.

Item Locations – This is where you define the supply locations that will be managed by the system and the items that are stocked at each location.

Location Groups – A location group is used to group multiple item locations together. This can be useful when building orders and in the PAR Vision reporting tool.

Codes – These are the miscellaneous lists that are used when setting up your items.

Print Item Labels – You can print labels that can be affixed to the bin or shelf where the inventory will be located. These labels make it significantly easier for the caregiver to find an item rather than looking at the manufacturer's packaging.

Items Without iButton – If you are using the PAR Excellence iButton system you can use this function to find all the items in the system that do not have a button assigned to the item. You can then assign a button for each item that needs one.

Batch Reconciliation – You can use this function to work with the reconciliation batches that have been created using the PAR Mobile Batch Reconciliation function. You can see the items in the batch and the quantities reconciled.

Items

This is where you setup the items that are managed by the system. Each item is only defined once and then that item can be stocked at multiple supply locations. In many inventory systems, including PAR Excellence, this is referred as the Item Master maintenance utility.

When you select the function from the menu you will see the Item Search screen. This screen has two tabs:

- **Maintenance** – Where you can add new items, change existing items and delete items from the system.
- **Browse** – This tab lets you view and modify the values for several pieces of information for multiple items on a single screen. For example, if you are updating your item cost information you can “browse” the item cost for all items and then change any or all the values on the screen.

The **Maintenance** tab is where you will do most of your work. You begin by searching for the item that you want to view or change. If you cannot find the item in the system then you use the Add button to create a new item record (if you are certain the item does not already exist in the system you can immediately click on the **Add** button without doing a Search).

You will notice that this is one of the few screens in the system that does not have a Facility selection. This is because you only define an item once in the system even if that item is used at multiple facilities, as well as, multiple supply locations in each facility.

Search fields:

Item Number – You can enter the item number or a partial item number. If you enter a partial number the system will show all items in which the partial string appears anywhere in the item number. For example, if you enter 1, the system will display all items where the number 1 appears anywhere in the item number. It is best, therefore, to enter as much of the item number as you know.

Vendor Number – You can enter the vendor item number or a partial vendor item number. Refer to the discussion on entering a partial item number (above).

Item Description – You can enter the item description or a partial item description. Refer to the discussion on entering a partial item number (above).

Include Deleted – In PAR Excellence, if you delete an item the record is “flagged” as deleted and not removed from the database. This lets you maintain the history for an item even if it is no longer used in the system. If you want to include any items flagged as deleted in your search, click to check this box.

After entering your desired search criteria, click the **Search** button. The system will use all the criteria when searching for an item. If you know the item number contains 123 and the description contains CATH, enter both pieces of information to get a smaller list of items from which to choose.

The actions that are available on this screen are:

- **Add** – This is to add a new item to the system. When you click this button the system will display a blank Item Maintenance screen so you can enter the item information for the new item.
- **Edit** – Use this action to view the information for an item and (optionally) make changes. Find the item you want to view/change on the search screen and click the item to highlight the line then click the Edit button.
- **Replace** – This function lets you replace an item in one or more locations with a different item. An additional feature in the function lets you quickly add a new item to all locations where another item is stocked (without replacing the existing item). For a full description of everything this function can do, refer to the [Replace Item](#) section later in this document.
- **Delete** – This function will flag the item record as deleted. The item information is not displayed before it is deleted so you may want to view the item first (using the Edit button) to verify you are deleting the correct item. Although the item record is not actually deleted (so it can easily be recovered), the item is removed from all supply locations so you do not want to delete an item by mistake. The system will make you confirm the delete by clicking **Yes** on a pop-up warning.
- **Quit** – Closes the Item maintenance function.

Item Maintenance

There is a lot of data stored in the system for each item, however, only a few fields are actually required if you are adding a new item. Pay attention to the fields framed with the red box since these are the only fields required to create a new item (all the required fields are on the General tab of the Add Item screen).

The item maintenance screen has six (6) tabs containing information as described below:

General – These are the main fields used by the system and all required fields are contained on this screen. Most of the information on this screen is used as the “default values” when you are adding an item to a supply location (using the [Item Locations](#) function).

Overrides – Although an item is only defined once for all facilities in the system, the system gives you the flexibility to have override values for most fields in different facilities. For example, if the cost

for the item fluctuates in different regions of the country, you can override the cost for certain facilities using the Overrides tab.

Units – This tab shows you all the units of measure defined for the item.

Locations – This tab shows all the supply locations where the item is stocked. You can also quickly add the item to a new supply location using the Add button on this screen. Refer to the description of this tab for hints on adding a new item to the system and then quickly adding the item to multiple supply locations.

Comments – This tab contains a miscellaneous comments box and some “user fields” that can be used however you want. These fields aren’t used by the PAR Excellence system but you can use them to enter information to be passed via the interface to the hospital MMIS system, etc. Contact the PAR Excellence Interface department for more information.

Use the **Save** button at the bottom of the screen after you have entered all your data to save the changes. If you want to abandon any changes you have made on the screen, click the **Cancel** button (this is most useful when you are in Edit mode if you are not sure of the changes you have made).

Item General Information

Item Number – *(required)* This is the number you use to identify the item. This is normally the number assigned to the item by your hospital MMIS system.

Item Description – *(required)* The descriptive name for the item. This is how the caregivers will recognize the item.

Manufacturer – *(optional)* Use this field you want to keep track of the manufacturer for the items. Use the dropdown list to find the Manufacturer and select it. If you don’t see the manufacturer in the list, you can type the name in the box and the new Manufacturer will be added to the system for use on this and future items.

NDC Number – *(optional)* You can use this for items that have an NDC number. It is not used by PAR Excellence but you can use it for reference purposes.

UNSPSC Number – *(optional)* You can use this for items that have an UNSPSC number. It is not used by PAR Excellence but you can use it for reference purposes.

Vendor Item No – *(optional)* – This is the item number assigned by the vendor or manufacturer of the item. This field is optional but it can be very useful when searching for items and it is included as a search field on most PAR Excellence search screens.

Item Class – *(optional)* – This can be used to group items together in the system. For example, you might enter LATEX in this field for any item that contains latex. It is up to you to define your classification values. There are a few reports that let you search for and sort by Item Class.

Minimum Order Qty – *(required)* – The minimum order quantity allowed from the replenishment source. Although this is required, it defaults to a quantity of 1.

Order in Multiples of – *(required)* – If the replenishment source only allows orders for a certain quantity, you can specify that here. Although this is required, it defaults to a quantity of 1.

Purchase Cost – *(optional)* This is what it costs the hospital to purchase the item from the vendor. Although this is an optional field, there are many reports on which it is displayed and some of those reports even use it for analysis purposes so you are encouraged to provide this information.

Patient Cost – *(optional)* This is what the hospital charges the patient for the item.

On Consignment – *(optional)* Check this box if this is a consignment item.

Item type – *(required)* The selections for this field are White, Blue and Both. Item types of White and Blue are specific to PAR Excellence (i.e., this is not standard inventory control terminology). These different types tell the system how to manage the quantity-on-hand for the item.

- Both – This will let you specify the item type at the supply location level. For additional flexibility when adding items to the locations, some hospitals add all Item Master records with an Item Type of Both.
- White – These are items that use an iButton or barcode to manage the quantity-on-hand. Every time an item is dispensed to a patient, the user will touch the button or scan the barcode to tell the system to subtract one from the quantity-on-hand.
- Blue – For these items the user is not responsible for doing anything to manage the quantity-on-hand.
 - In most cases, the quantity-on-hand is calculated by a PAR Bin scale. When an item is removed, the weight changes and the system will automatically subtract one from the quantity-on-hand.
 - If there is no scale assigned to the item, the system does not manage the quantity-on hand. A supply technician will simply tell the system the quantity to be replenished (when stock gets low).

If the item will be managed by a PAR Bin scale, make the item type Blue (or Both). When you add the item to a supply location, there will be an additional box to tell the system that the QOH will be automatically managed based on weight versus someone counting the item.

Requisition Quantity – (optional) For a Blue type item that does not have a scale you can enter a default quantity to be replenished when the supply tech requisitions the item.

PAR Level – (required) This is the quantity of the item to be maintained at a supply location. This value will be used as the default value whenever you add an item to a supply location but you can override this value at that level.

Critical Alert Level – (optional) This is the quantity at which you will consider the stock level critically low (i.e., it needs to be replenished soon). This value will be used as the default value whenever you add an item to a supply location but you can override this value at that level.

Unit of Issue – (required) This is the unit of measure that is issued from the supply room to the patient. Typically, this is the low unit of measure. If this is a new item you will have to add the unit of measure (using the **Add** button). If you are making changes to an existing item, you can select one of the units of measure that have already been defined for the item from the dropdown list.

Unit of Replenishment – (required) This is the unit of measure used to restock this item in the supply location from the replenishment source. For some items it will be the same as the unit of issue but for others it will be different. For example, you use sutures one at a time for a patient but you will probably replenish the supply location with a full box of 24 sutures when the box is getting close to being empty. If the desired unit of measure has not been defined for this item, you will have to add it (using the **Add** button).

More information on [Adding a Unit of Measure](#) can be found later in this chapter.

Bin Label – (optional) This is the text that will be printed on the item label to describe the item. If you leave it blank for a new item the system will default to the Item Description. This field is provided, as well as, the item description because the label text is usually an abbreviation of the full description (due to limited space on the label). Your PAR Excellence Account Manager can work with you on a process for generating meaningful Bin Label values.

Expense Code – (optional) The account to which the expense is applied (in the accounting system).

Charge Type – (required) Select one of the values from the dropdown list. When a Chargeable item is dispensed it will generate a patient charge transaction to be sent to the hospital billing system. When Non-Chargeable items are dispensed no transaction is created.

Charge Code – (required) This is only required when Charge Type=Chargeable is selected. This is the charge number sent to the billing system in the patient charge transaction.

Revenue Center – (optional) The department that receives the revenue for this item (in the accounting system).

Revenue Code – *(optional)* The account to which the revenue is applied (in the accounting system).

Replenishment Source – *(optional)* In this field you can specify the default replenishment source for the item. The actual replenishment source is defined when you add the item to the supply location. Select one of the entries from the dropdown list.

Replenishment Bin – *(optional)* In this field you can specify the bin within the replenishment source where this item is stocked. This is normally only used when the item is replenished from a storeroom internal to the hospital. The system can print this information on a pick ticket that will be used to pick an order from the storeroom. This can speed up the replenishment process by telling the supply technician exactly where the item is located in the storeroom.

ABC Classification – *(optional)* If you are using the PAR Excellence Cycle Counting feature, you can specify an override ABC classification for the item. If there is no override specified, the system will determine the ABC classification using a combination of usage and cost.

Expense Code, Revenue Center and Revenue Code must be selected from a predefined list of values that you set up in the system using the [Codes](#) function.

Adding a Unit of Measure

The unit of measure for an item is a combination of a unit of measure code (such as; BX for box) and a conversion factor (for example; if a box contains two dozen sutures, the conversion factor is 24).

When you click the Add button the **Add Conversion Factor** pop-up screen will be displayed. The screen contains several fields, however, only the unit of measure code and conversion factor are required.

- **Unit of Measure** – Select a unit of measure code from the dropdown list. PAR Excellence delivers the system with a default set of Unit of Measure codes and you can add new codes using the [Codes](#) function.
- **Conversion Factor** – This is the number of “units” in this unit of measure. For example, if a box of sutures contains two dozen sutures, the conversion factor for the box is 24. The conversion factor for the low unit of measure for an item is always 1.
- **Reference Weight** – If the quantity-on-hand for the item is being maintained using a PAR Bin scale, this is the weight of one of these units of measure. Normally, you will not enter this item manually. When you register the item to a scale the system will calculate this value for you.
- **Cost** – This is what it costs the hospital to purchase this unit of measure from the vendor. This is optional in PAR Excellence but there are many reports on which it is displayed and some of those reports even use it for analysis purposes so you are encouraged to provide this information. You only need to enter the cost for the low unit of measure for the item and the system will calculate the cost for other units of measure using the conversion factor.
- **Global Trade Item Number (GTIN)** – This is the unique number assigned for this item by the GS1 standards organization. This information is optional and not used in the PAR Excellence system, however, if you need PAR Excellence to pass this number to other systems (via an interface), you can enter the value here.

After entering the information for the unit of measure, click the **OK** button.

Item Overrides

If you are using the PAR Excellence system to manage the information for multiple facilities in the same database, this tab lets you set different values for any of the fields on the [Item General Information](#) or [Item Comments](#) tabs for each facility. For example, if the cost for the item fluctuates in different regions of the country, you can override the cost for certain facilities using this tab.

You have full control over which fields are displayed in the grid on this tab. Use the **Select Columns** feature (described in the [Grid Control](#) section of this document) to change the columns that appear on the screen.

You can override any field on the General tab even if the field is not displayed in the Overrides grid. The grid on this screen is intended to give you an easy way to see all the override values for all facilities in one organized list.

To override the value of a field for a specific facility, if you see the facility name in the grid, click on the name to highlight the line and click the **Edit** button. If the facility name is not in the list, click the **Add** button.

The screen that is displayed is a duplicate of the [Item General Information](#) and [Item Comments](#) tabs described in this chapter. If you used the **Add** button to create the override values for a new facility (that was not already displayed in the list) you must start by selecting the facility for which these override values will pertain.

Find the field for which you want to enter an override value and click in the field and type the new value (to be used just at the selected facility). You can enter override values for any and all fields on the screen. If the default value you entered on the General tab is correct for this facility, just leave the override field blank. All fields on this screen are optional since any field without an override value will just use the default value from the General tab.

You can enter override values for some, or all, facilities and you can enter different override values for different facilities.

Item Units

This tab shows you all the units of measure that have been defined for this item. You can also add additional units of measure, modify those that already exist or delete units of measure that are no long needed.

To add a new unit of measure for the item, click the **Add** button.

To change the information for an existing unit of measure, click on the line for that unit of measure to highlight the line and click the **Edit** button.

To delete a unit of measure for this item, click on the line for that unit of measure to highlight the line and click the **Delete** button. If the In Use column in the grid says **Yes**, you will not be able to delete the unit of measure because it is currently being used as the Unit of Issue or Unit of Replenishment on either the [Item General Information](#) tab or in the definition for one of the supply locations.

For more information about adding or editing a unit of measure, refer to the [Adding a Unit of Measure](#) section of this chapter.

Locations

On this tab you can see all the supply locations where this item is stocked. You can also easily add the item to additional locations from this screen. The information displayed on this screen includes:

- **Facility** – The name of a facility where this item is stocked in a supply location.
- **Location** – The name of the supply location where the item is stocked.
- **Item Type** – This is the PAR Excellence type.
 - White – These items have the quantity on hand managed by touching an iButton or scanning a barcode.
 - Blue – The system does not manage the quantity-on-hand for these items. When inventory is running low, a supply technician will tell the system how much inventory should be replenished (via a Requisition).
 - PAR Bin – The quantity-on-hand for these items is automatically managed by the system based on weight. When an item is removed the weight goes down and the system automatically subtracts from the quantity-on-hand.

Black is a fully operational weight based item.

Orange is an item that is set up to be a weight based item but a scale has not yet been registered for the item.

Red is an item that has a scale registered but the system cannot calculate the quantity-on-hand because it doesn't have enough information about the item.

- **PAR Level** – The quantity of the item to be maintained at this supply location.
- **Critical** – The quantity which is considered critically low at this supply location.
- **On Hand** – The current quantity-on-hand for this item at the supply location.
- **UOM** – The unit of measure relative to the quantity-on-hand.
- **Modified** – The date this item was last changed in this supply location.

Add a Location

If you are adding a new item to the system and you want to immediately add the item to one or more supply locations, you can do all your work without leaving the Items function. Follow the process outlined below:

1. Select **Add** on the Item Search screen and complete all the information to create the new item.
2. Click **Save** to create the new item record.
3. Enter the newly added item number on the search screen and click the **Search** button.
4. The item will be displayed and the row will be highlighted. Click the **Edit** button.
5. Click on the **Locations** tab.
6. Click the **Add** button.
7. Select a facility and supply location where the item will be stocked and click **OK**.
8. The Add Location Item screen is displayed with all the default values from the Item master record.
9. Change the information as needed for this location. The fields that will most likely need to be changed are:
 - a. General → PAR Bin.
 - b. Ordering → PAR Level, Critical Alert Level, Reorder Point.
 - c. Ordering → Replenishment Source.
10. After changing the desired fields for this location, click **Save**.
11. To add the item to another location, go back to step 6 and repeat the process for another supply location.

Item Comments

On this screen you can add comments and “user field” values for the item. This information is not used by the PAR Excellence system but you might need this information to be passed via the interface to the hospital MMIS system, etc. Contact the PAR Excellence Interface department for more information.

The values you enter on this tab can also be overridden on the [Item Overrides](#) tab for one or more facilities.

Item Browse

The Item Browse function can be found in the [Items](#) function on the Browse tab.

The purpose of the function is to show you the data for all items on a single screen so you can quickly make changes to the data for all or some of the items. For example, if a manufacturer has price increase you may need to change the purchase cost of many items all at one time. The alternative is to search for each item to be changed and use the edit item function on each item to change the cost and save the changes.

The fields on the Browse search screen are:

Facility – If you have access to multiple facilities you can select a facility to see only the items used at a specific facility.

Include Override Values – If you are editing items for only one facility and you are using the Overrides feature to override values at that facility, you can check this box so you can edit both the default value and the override value at the same time.

Location Name – Select a supply location to edit only the items stocked at that location.

Item Number – Enter all, or part, of an item number to edit only the items that have an item number that matches the string.

Item Description – Enter all, or part, of an item description to edit only the items that have an item description that matches the string.

Page Size – Enter the number of rows to be included on a single page before you have to increment the page number to continue you edits.

Include:

Bin Label – Check this box to view/edit the bin label for all items.

Item Class – Check this box to view/edit the item classification for all items.

Order Minimum – Check this box to view/edit the order minimum for all items.

Order Multiple – Check this box to view/edit the order multiple for all items.

Purchase Cost – Check this box to view/edit the purchase cost for all items.

Modified – This is not an editable field but it can be useful to have it displayed on the screen when editing any of the other fields.

Although the screen lets you display and edit multiple fields at one time, it is normally easier to just edit one field at a time.

After making all your search selections, click the **Search** button to display the selected items/fields.

To quickly scroll down the screen and make changes to the data in the selected field, follow the process outlined below.

1. Use the **down arrow** key on the keyboard to move down to an item to be changed.
2. Press the **Enter** key to open the line for editing.
3. Type your new value.
4. Press the **Enter** key for accept the change and close the edit window.
5. Use the **down arrow** key on the keyboard to move down to the next item to be changed.

Continue using the down arrow key on the keyboard and the Enter key to rapidly move through the items and make the changes.

Replace Item

A common maintenance activity in a Materials Management department is replacing an item stocked in several locations with a new item that serves the same purpose. This is sometimes referred to as an Item

Conversion. It is not unusual for a manufacturer to discontinue an item and offer a new, improved item in its place. The new item has a different item number and manufacturer's number and probably a slightly different description. Most importantly, when you order the item you must specify the new item number on the order to the vendor.

This function lets you easily swap the old item for the new item in all locations where the old item is stocked.

As an extra feature, you can also use this function to quickly add a new item to all locations that currently stock another item. For example, you want to start stocking a new type of glove at all locations where a similar glove is stocked. This feature is available by selecting the "copy only" box on the replace item screen.

Start the process by selecting the item to be replaced (or copied) on the Item Search screen and click the **Replace** button.

On the first Replace Item screen you will see the following fields.

Item to be Replaced

- **Item Number** – This field is pre-filled with the item number selected on the Item Maintenance search screen.
- **Item Description** – This field is pre-filled with the description of the item on the Item Maintenance search screen.
- **Facility** – Select the facility where the old item will be replaced (or copied).
- **Location Group** – Optionally you can replace the item only in the locations that belong to a particular group. You will have the opportunity to select specific locations where the item will be replaced in the next step.

Replace with Item

- **Search** – Click the Search button and find the new item that will replace the old item (or copied into the same locations as the old item). Once the new item is selected from the item search screen the item number and item description will be displayed in this area of the screen.

To use this feature you must first create the new item in the Item Master table.

Click the **Next>>** button.

Replace Item Details

This screen gives you complete flexibility to select the locations where you want the old item to be replaced and even change some of the key fields for the item related to ordering the new item. This screen also contains the check box that you can use to simply create the new item in each of the selected locations **without** replacing the old item.

- **Do not remove old item from location (copy only)** – Check this box if you are only using the feature to add a new item in a selected list of locations without removing the old item.

The bottom part of the screen contains a list of all the locations where the old item is stocked. The first column in the list is a **Replace** box that you can use to indicate at which locations the new item is supposed to replace the old item – or – at which locations the new item will be created (if you are doing a copy only).

You can also use the **Select All** and **Deselect All** buttons on the screen to quickly check/uncheck all locations.

After you have selected a location you can change the values of certain columns on the screen as required for the new item being put into the location. Click on the value currently displayed to open an edit box to change the value. The fields that can be changed are:

- **Issue Unit** – The system displays the unit of issue for the old item. If this is not the correct unit of measure for the new item, you can change it. The list of allowable units is based on what units of measure are defined for the new item.
- **Repl Unit** – The system displays the unit of replenishment for the old item. If this is not the correct unit of measure for the new item, you can change it. The list of allowable units is based on what units of measure are defined for the new item.

If the Issue Unit or Repl Unit is displayed in red it indicates that the unit of measure specified for the old item is not currently defined for the new item. You can leave the value as-is and the system will create that unit of measure for the new item. In this case you are encouraged to review the units of measure for the new item to be certain all the factors are correct.

- **PAR Level** – The system displays the PAR level for the old item. If this is not the correct PAR level for the new item, you can change it.
- **Critical** – The system displays the Critical level for the old item. If this is not the correct Critical level for the new item, you can change it.
- **Reorder** – The system displays the Reorder Point for the old item. If this is not the correct Reorder Point for the new item, you can change it.

If you cannot change the Critical level or Reorder Point it is because the old item is defined as a "Blue Label" item at this location which does not have a Critical level or Reorder Point.

- **Replenishment Source** – The system displays the Replenishment Source for the old item. If this is not the correct replenishment Source for the new item, you can change it.
- **Ref Wgt.** – The value in this column and whether you can change it depends on what reference weight values already exist in the system.
 - If the new item already has a reference weight the value will be displayed and you cannot change it.
 - If the old item has a reference weight but the new item does not, the weight for the old item is displayed in red and you can change it if you want. The manually entered weight will display in yellow.
 - If neither the old or new item has a reference weight for the selected Issue Unit, the column will be blank but you can click into the field and manually enter a weight. The manually entered weight will be displayed in yellow.

Any time you manually enter a weight you should use the PAR Bins Setup program to verify the weight and correct it if necessary at your earliest convenience.

When you have completed all the fields on the Replace Items detail screen, click the **Save** button to complete the process.

Replenishment Sources

Use this function to maintain the sources you use to replenish the inventory in the supply locations. A replenishment source might be a storeroom inside the hospital or it may be an external supplier or manufacturer.

The data stored for a replenishment source is crucial to how orders are built and extracted by the system.

When this function is selected from the menu a list of all existing replenishment sources is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the source with which you want to work.

Facility – If you have access to multiple facilities, you can select a facility to see only sources that can be used at that facility.

Include Global – Replenishment Sources can be setup to be used by any facility or customized to the needs of just one facility. Those that can be used by any facility are the global sources. Check the box if you want to see all replenishment sources or uncheck the box to see just the facility specific sources.

Source Name – You can start typing a replenishment source name and the utility will start filtering the list to show only the sources that match what you have typed so far. When you see the desired source on the screen, stop typing and click on the source.

Show Deleted – Check this box see the replenishment sources that have been flagged as deleted.

The buttons that are available on this screen and the action they perform are:

Add – Create a new replenishment source.

Edit – View or change the information for an existing replenishment source.

Copy – Create a new replenishment source by copying all the information from the source that is highlighted on the screen. This is very useful because the definition of a replenishment source can be very tedious so if you know your new source should be setup the same as an existing source, you can use the Copy function to reduce your workload.

Delete – Delete a replenishment source. The data is not actually deleted from the system. The source is just flagged as deleted so it cannot be selected to be used on an item. You can easily undelete a source if it has been deleted in error or was deleted and now needs to be used again.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which sources have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the source.

Quit – Close the Replenishment Sources function.

Add or Edit a Replenishment Source

When you click the **Add** or **Edit** buttons the system will display the Replenishment Sources maintenance screen. This screen contains three (3) tabs of data that is used to define a replenishment source and tell the system how to process orders for this source.

General – This tab has a few fields of general information used by some replenishment sources.

Reorder Points – This tab lets you setup how the system calculates the reorder point for the items replenished by this source.

Interfaces – On this tab you define how the interfaces for this replenishment source will work. This is extremely important information in the system. If you are not familiar with how the PAR Excellence interfaces work, do not make any changes on this screen without consulting with the PAR Excellence interface department.

General Replenishment Source Information

Source Name – (*required*) This is the name of the replenishment source. This can be the name or room number of a storeroom internal to the hospital or the name of a vendor or supplier.

Global Location No – (*optional*) This is the unique location number assigned to this organization/entity by the GS1 standards organization. This information is optional and not used in the PAR Excellence system, however, if you need PAR Excellence to pass this number to other systems (via an interface), you can enter the value here.

For Use at Facility – (required) If this replenishment source will be used by only one facility, you can select the facility here. If you only have one facility or the same replenishment source specifications will be used by all facilities, use the default value (All).

Source Type – (required) Select Internal or External from the dropdown list. An internal source is usually a central storeroom somewhere in the hospital and an external source is a vendor or supplier. This information is primarily used for backorder processing. If you are using a receipt confirmation interface, a backorder is never created for an Internal replenishment source. The system will receive the quantity entered on the in the receipt confirmation file and close the line item (these are sometimes referred to as Fill/Kill sources). If you use a low unit of measure supplier, you may want to set that up as an Internal source (even though it is external to the hospital) because many LUM suppliers process orders like an internal source (i.e., items are never backordered).

Source is PAR Location – (optional) If this is an Internal source and that source is an inventory location being managed by the PAR Excellence system, select the PAR Location name here. When a PAR Location is used as a replenishment source, the system will create offsetting transactions when an order is filled to increment one inventory and decrement the other.

Sort Order Report By – (required) This can be used to override the sorting option for a pick list generated for this replenishment source. Your system administrator has defined a default sort order for the pick list but you can override the sort order by making a selection from this list.

Order Report Options – (optional) This field is only used for special circumstances. Contact the PAR Excellence interface department for more information about values that can be entered in this field.

Build Separate Order for Each PAR Location – (optional) The default value is for this box to be checked and the system will build individual orders for each PAR Location that uses this replenishment source. This is the recommended setting because it makes it easier to manage the put-away and closing of the orders. If you uncheck the box all items being ordered from this replenishment source will be put on the same order without regard to the PAR location where the stock will be put away.

No Order Minimums – (optional) Check this box to disregard Minimum Order Quantities when building orders for this replenishment source.

Automatically Close Order When Build – (optional) If this box is checked, any order built for this replenishment source will automatically be closed (received in full) immediately after it is extracted and sent to the source. We do not recommend using this option. If you use this option you lose the ability to adjust the orders if they are not received in full and the usage information tracked by the system will get skewed if more or less stock is delivered versus what was ordered.

No Backorders – (optional) Check this box to disallow backorders from this replenishment source. You will normally check this box for your internal replenishment sources.

Replenishment Source Reorder Point

This tab provides a flexible mechanism for setting up reorder points at the replenishment source level.

Historically, inventory managers have set a reorder point for each individual item. For example, if the PAR level for an item is 10, you might set the reorder point at 5 to insure the new stock arrives before you run out of stock. This works well but is tedious to manage and maintain.

PAR Excellence gives you the ability to set an overall percentage and percentages by PAR Level that will allow the system to generate reorder points for the items replenished from this source thus eliminating the need to set the individual reorder points at the item level. The system still lets you set a reorder point at the item level but we recommend that you use that for only the unique items that don't fit any of the schemes available at the replenishment source level.

By Default, Reorder Items when below XX% of PAR Level – (required) This is the default reorder point percentage for this source. Any item that does not have a specific reorder point at the item level or does not fall into one of the PAR level schemes described below will be reorder when the inventory level falls below this percentage.

You should set this percentage based on the lead time from this source and the number of days of inventory you used to set your PAR Levels, keeping in mind, how often you will generate orders.

For example, you would use a higher percentage for a source with a long lead time or a lower percentage if your PAR levels are set for a high number of days of usage. Consult with your PAR Excellence Account Manager to set these percentages levels at the optimum level to minimize value of the inventory sitting in the supply location but insuring that you do not run out of stock for an item.

PAR Level Percentages – In this grid you can set reorder point percentages based on PAR level to override the percentage specified above. For example, in if the replenishment source percentage is 50%, you might want to override that to 70% for item with PAR level of 5 or less to insure you don't run out of stock on those items while waiting for delivery of the order.

To add an override percentage for a PAR level, click the **Add** button and complete the fields on the pop-up screen.

For an Item With a PAR Level Between XX and XX – Enter the low end and high end of the range of PAR levels to be affected by this rule. For example, the rule will affect any item with a PAR level between 1 and 10.

Reorder when QOH is Below XX% PAR Level – Enter the percentage of PAR level that should determine reorder point for this PAR level range. For example, when the PAR level is between 1 and 10, reorder when the QOH is at or below 60% of PAR level.

Reorder when OOH is XX or Less – Alternately, you can set a fixed QOH value as the reorder point for items in this PAR Level range. For example; when the PAR level is between 1 and 10, reorder when the QOH is 5 or less. In that example, any item with a PAR level of 1, 2, 3, 4 or 5 the reorder point will be 1 less than PAR level. For items with PAR Level 6, 7, 8, 9 and 10 the reorder point will be 5.

Click **OK** to save the values for this rule and then you can add another rule. Any items with a PAR level that is not covered by a specific rule will order based on the Default Reorder Percentage (explained above).

Replenishment Source Interfaces

This tab is used by the system to extract the orders for this replenishment source and process receipt confirmation files received from this source.

The order extract process can be different for each replenishment source. At most hospitals, the extract process for most replenishment sources is to build an interface file that is sent to the hospital MMIS system. Some hospitals will print a pick ticket for internal sources and send interface files for external systems.

Receipt confirmations also vary by replenishment source. A receipt confirmation is typically an interface file sent from the hospital MMIS system to PAR Excellence that tells the system what was actually sent to the supply location (versus what was ordered). The PAR Excellence system can use this confirmation file to automatically make the order adjustments and close the order eliminating the need to manually close the order using the [Receiving](#) function.

Use the **Order Extract** tab at the bottom of the screen to select how the orders will be extracted.

Use the **Order Receipt** tab to select the interface used for receiving an order.

Every replenishment source will have an **Order Extract** interface. Select the order extract interface as directed by the PAR Excellence Interface department. The system also supports a "No Extract" option. If you select "No Extract", the system simply changes the order status from Built to Extracted order when the order is extracted (i.e., no interface files are built or pick tickets printed). Talk to PAR Excellence about the situations when this option might be useful.

Not all sources will have an Order Receipt interface. If there is no receipt interface specified, you will just use the Receiving function to receive the orders in PAR Excellence. Select the order receipt interface as directed by the PAR Excellence Interface department.

The PAR Excellence Interface department will also work closely with you to setup the other information on this screen. It is generally recommended that you do not make changes to this information without contacting PAR Excellence first.

Item Locations

This function is used to define the supply locations that will be managed by the PAR Excellence system and identify the items that are stocked at those locations.

There are two steps to setting up a new supply location in PAR Excellence.

- First you setup the Location record.
- Once the Location is defined, you can Edit the location and identify the items stocked at the location. This process is described in the [Location Items](#) section later in this chapter.

The buttons on this screen perform the following actions.

- **Add** – Complete the Location Information on the pop-up screen and click the **Save** button. The system will take you directly to the screens to add items to the newly created location.
- **Edit** – Use this button to make changes to an existing location. You can change any of the Location Information or to the items in the location. See [Edit Location](#) below.
- **Copy** – This button will let you copy all the information for an existing location to create a new location. All the Location Information and all the Items will be copied.
- **Delete** – Use this to delete a location. All the items will be removed from the location and the location is flagged as deleted.

Items are NOT removed from the Item Master but any changes you made when you added the item to the location will be lost.

Location Information

The information associated to a supply location, or as it is called in PAR Excellence, a PAR Location is described below.

Facility – (*required*) Select the facility where this supply location is located. If you have access to only one facility, this field will already be selected for you.

Location Name – (*required*) Enter a name for this supply location. This name must be unique among all the locations for a facility.

No items are stocked at this location – (*optional*) Check this box to tell the system that there are no items at the location. Locations such as this are used only for capturing who received an item when it is dispensed. Normally, an item is dispensed to a patient but sometimes an item will be taken from a supply location and not given to a patient but you still want to track the dispense activity. For example, if a box of tissues is taken to be used at the nursing station. Some hospitals will just dispense these items back to the supply location from which they were taken but other hospitals want to be more specific so they will set up Locations with no items. These location names do appear in certain lists (such as; when building an order).

Expense Center – (*optional*) The account to which the expense is applied (in the accounting system).

Global Location Number – (*optional*) This is the unique location number assigned to this organization/entity by the GS1 standards organization. This information is optional and not used in the PAR Excellence system, however, if you need PAR Excellence to pass this number to other systems (via an interface), you can enter the value here.

Include secondary location quantities when reconciling – (*optional*) If you are using iButtons or barcodes to manage the inventory at this location it is recommended that you reconcile the stock levels occasionally. If

this location also has secondary locations associated to it, this tells the system how to process the reconciliation of the secondary locations. Consult with your PAR Excellence Account Manager about how to use these features.

Inventory is stocked at primary inventory – (optional) If a location is made up of multiple secondary locations, sometimes the primary location is not really a supply location but simply a name used to organize the secondary locations. This information is used in the reconciliation process.

Blue label items may be chargeable – (optional) You should check this box if you are using PAR Bin scales to manage the inventory in this location *and* you are tracking patient changes for items dispensed from the location.

Do not build orders for this location – (optional) This options is usually used while you are initially setting up a new location. During the physical setup of a supply room the quantity-on-hand values may not be accurate so you do not want the system to generate a replenishment order based on those values. Once the location is fully set up, you can uncheck this box as part of the go-live procedure for the room.

Interfaces – These are fields that pertain to the **Interfaces** between PAR Excellence and the hospital MMIS system. Consult with the PAR Excellence Interface department for information about how to complete these fields.

Edit Location

After you have created a location and items have been added to the location you will use the Edit Location function to make your day-to-day adjustments to the location and its items. The screen has four tabs containing the following information.

Items – This screen shows all the items stocked at the location. To make changes to the setup of an item at the location, click on the item to highlight the row and click **Edit**. This takes you into the [Location Items](#).

General – This tab lets you make changes to the basic [Location Information](#).

Groups – On this tab you can see and change the [Location Groups](#) to which this location belongs.

Interfaces – This tab lets you make changes to the interface information of [Location Information](#).

The **Items** tab of this screen is one of the focal points of the PAR Excellence system. Much of the activity related to maintaining the inventory at the various supply locations will be done from this screen.

The buttons available on this screen and their actions are:

Add – Click this button to add a new item to the supply location. The item must already exist in the Item Master. The system will display the Item Search screen for you to find the item to be added. After selecting the item you are taken to the [Location Items](#) function.

Edit – Use this button to make changes to an existing item in the location. Click on the item to highlight the row and then click Edit. This will take you into the [Location Items](#) function.

Adjust – This button lets you adjust the quantity-on-hand for an item that uses the PAR Excellence iButton or barcode system to manage the quantity-on-hand. These are items with Item Type=White.

When using the iButtons or barcodes the user must touch the button (or scan the barcode) every time he/she removes and item from the bin. If they forget to do that, the quantity-on-hand for the item will be wrong and must be adjusted. If you do a physical count of the item and it does not match the quantity-on-hand in the system, you can use this function to make the adjustment.

Move – This function lets you easily move an item from one location to another. The item will be completely removed from this location and a new item will be created in the **New Location**. This function is useful for an item being managed by a PAR Bin scale because it will move the scale registration to the new location also. When you physically move the item from Room A to Room B, be sure to take the associated scale(s) with you.

This function is different from the Transfer Inventory function. When you transfer inventory you are only moving some of the inventory for the item from one room to another. This function moves the entire Location Item definition to the new supply location.

Delete – The button is used to remove an item from the supply location if you decide you no longer need to stock this item in this location.

Location Items

The second step to setting up a new supply location in the PAR Excellence system is to identify the items that will be stocked in the room. You can also use this function to make changes to the items stocked in a room (such as; adding new items, removing items or changing PAR levels).

On the **Item Locations** screen find the location with which you want to work. Click on the location to highlight the row and click the **Edit** button.

The **Edit Location** screen will be displayed showing all items currently stocked at the location. If this is a brand new location, the item list will be empty.

To add an item to the location, click the **Add** button and the **Item Search** screen will be displayed so you can search the Item Master list to find the item to be added to the location.

Search fields:

Item Number – You can enter the item number or a partial item number. If you enter a partial number the system will show all items in which the partial string appears anywhere in the item number. For example, if you enter 1, the system will display all items where the number 1 appears anywhere in the item number. It is best, therefore, to enter as much of the item number as you know.

Vendor Number – You can enter the vendor item number or a partial vendor item number. Refer to the discussion on entering a partial item number (above).

Item Description – You can enter the item description or a partial item description. Refer to the discussion on entering a partial item number (above).

Enter the desired search fields and then click the **Search** button. Locate the item to be added and click on the item to highlight the row and click **OK**.

Now the **Add Location Item** screen is displayed. There are four tabs on this screen with various fields that can be entered for the item that are specific to supply location. Several of the fields on these tabs are already completed using the default information from the Item master record but any of these values can be overridden for the item at this specific location.

Location Items General Information

Most of the fields on this tab have default values from the [Item General Information](#). Complete the fields on the General Information tab as described below.

PAR Bin Item – Check this box if this item will be managed using a PAR Bin scale. If the quantity-on-hand will be managed by an iButton or barcode, leave this box unchecked.

Item Type – This field is only displayed if you set up the Item Master record for Item Type=Both. If the Item Type in the Item Master (in the [Item General Information](#)) is either White or Blue, this field will not be displayed and you will not be able to change the Item Type for the location.

Charge Only – Check this box if this item is being added to the supply location only so the users can change it to a patient (i.e., the system will not manage the quantity-on-hand). This is not typical for items managed by PAR Excellence since the key feature of the system is the inventory management component.

Expense Code – This value will default to the value entered in the Item Master. If you want to override the value at this location, select the override a value from the dropdown list.

Charge Type – This value will default to the value entered in the Item Master. If you want to override the value at this location, select the override a value from the dropdown list.

Charge Code – This value will default to the value entered in the Item Master. If this is a chargeable item, the default value from the Item Master will be displayed in the box in gray font (versus black). If you want to override the value at this location, enter the override a value in the field. This field is not available for non-chargeable items.

Revenue Center – This value will default to the value entered in the Item Master. If you want to override the value at this location, select the override a value from the dropdown list.

Revenue Code – This value will default to the value entered in the Item Master. If you want to override the value at this location, select the override a value from the dropdown list.

ABC Classification – (*optional*) If you are using the PAR Excellence Cycle Counting feature, you can specify an override ABC classification for the Location item. If there is no override specified, the system will determine the ABC classification using a combination of usage and cost.

Location Items Ordering Information

Most of the fields on this tab have default values from the [Item General Information](#). Complete the fields on the Ordering tab as described below.

Do Not Reorder – Check this box if you want to stop ordering this item. The system will continue to maintain the quantity-on-hand but when the stock level reaches the reorder point it will not be reordered.

Unit of Issue – This is the unit of measure that is issued from the supply room to the patient. Typically, this is the low unit of measure. For a new item being added to the location, the default value from the Item Master is populated in the box but you can override that value if the item is issued differently in this location than it is in others. To change this value, select a unit of measure from the dropdown list.

Conversion Factor – The conversion factor for the Unit of Issue. If the system already knows the conversion factor (because this unit of measure was used previously for this item) it will be displayed. If this is a new unit of measure for this item, the box will be empty (and marked as required) and you can enter the conversion factor.

Global Trade Item Number – This is the unique number assigned for this item by the GS1 standards organization. This information is optional and not used in the PAR Excellence system, however, if you need PAR Excellence to pass this number to other systems (via an interface), you can enter the value here.

Unit of Replenishment – This is the unit of measure used to restock this item in the supply location from the replenishment source. See Unit of Issue for information about changing the value.

Conversion Factor – The conversion factor for the Unit of Replenishment. See Unit of Issue Conversion Factor for information about changing the value.

Global Trade Item Number – This is the unique number assigned for this item by the GS1 standards organization. This information is optional and not used in the PAR Excellence system, however, if you need PAR Excellence to pass this number to other systems (via an interface), you can enter the value here.

PAR Level – This is the quantity of the item to be maintained at this supply location. For a new item being added to the location, the default value from the Item Master is populated in the box but this is one of the values that will most likely fluctuate from location to location.

Critical Alert Level – This is the quantity at which you will considered the stock level critically low (i.e., it needs to be replenished soon). For a new item being added to the location, the default value from the Item Master is populated in the box but you can change the value by typing a new value in the box. This field is not available for items with Item Type=Blue that do not have the PAR Bin Item flag checked.

Calculated Reorder Point – This is reorder point that is calculated by the system for this item. This value is calculated based on the [Replenishment Source Reorder Point](#) percentages and rules. Ideally, you can define

the rules at the replenishment source level so you do not have to maintain reorder points for each individual item.

Override Reorder Point – If the calculated reorder point is not sufficient for this item at this location, you can always set the Override Reorder Point and set a specific reorder point value.

Replenishment Source – If the item in this supply location is replenished from a different source from that specified in the Item Master (or if a replenishment source was not specified for the Item Master), you can select the replenishment source from the dropdown list.

Replenish Bin – This value will default to the value entered in the Item Master. The default value from the Item Master will be displayed in the box in gray font (versus black). If you want to override the value at this location, enter the override a value in the field.

Requisition Quantity – This is the default requisition quantity for items with Item Type=Blue that do not have the PAR Bin Item flag checked. For a new item being added to the location, the default value from the Item Master is populated in the box but you can change the value for the item at this supply location.

Location Items Stock

Most of the fields on this tab are unique to the item at the supply location. Complete the fields on the Stock tab as described below.

Shelf Location – This is the physical location of the item in the supply location. This field usually contains information such as, Shelf 3 – Bin 5 (abbreviated as S3-B5). This information is displayed on various PAR Excellence Item Locator functions and can be useful when a user is looking for an item in a room with which he/she is unfamiliar. Talk to your PAR Excellence Account Manager about features in the system to help automate the assignment of Shelf Locations.

Bin Label – This is the text printed on the Item label (that gets attached to the bin). This value will default to the value entered in the Item Master. The default value from the Item Master will be displayed in the box in gray font (versus black). If you want to override the value at this location, enter the override a value in the field.

Scan Type – Select from one of the two options provided.

- iButton – If the quantity-on-hand for this item at this location will be maintained using the PAR Excellence iButton system select this option.
- Barcode – If the quantity-on-hand for this item at this location will be maintained using either a barcode or using the PAR Bin weight based system with a scale select this option.

Tracking Information – If you have selected Barcode as the Scan Type, you can specify additional information to be captured from the barcode. Typically you would only capture this information for items that have quantity-on-hand being managed with a barcode (not a PAR Bin scale). Talk to your PAR Excellence Account Manager about the PAR Excellence features that let you track UDI information for an item. The Tracking information you can capture includes:

- Lot Number – Captured only when the item is dispensed to a patient.
- Lot Number and Serial Number – Captured only when the item is dispensed to a patient.
- Expiration Date – Can be captured when the inventory is received into the hospital, as well as, when the item is dispensed to a patient.
- Expiration Date and Lot Number – Can be captured when the inventory is received into the hospital, as well as, when the item is dispensed to a patient.
- Expiration Date, Lot Number and Serial Number – Expiration Date and Lot Number can be captured when the inventory is received into the hospital and all three are captured when the item is dispensed to a patient.

Barcode Value – PAR Excellence will generate a unique barcode value for each item. This value is internal to PAR Excellence. Utilities are available in the system to link the PAR Excellence barcode to the manufactures barcode if you plan to track quantity-on-hand using the barcode. If the quantity-on-hand is being managed by the PAR Bin weight based system, the internal PAR Excellence barcode is used to set up the PAR Bin scale. For existing items the PAR Excellence barcode value is displayed in this box. For new items being added leave the box empty and the system will generate a value when you click the Save button.

iButton Value – For items that will have the quantity-on-hand managed by the PAR Excellence iButton system you must associate one of the iButtons to the item (so when it is touched with the probe, the system knows which item QOH to decrement). The button value is printed on the button and, if you can read the number, you can enter the value in the box. You can also use the Read Button Value button to capture the value directly from the iButton.

Read Button Value – This button will let you capture the button value off the iButton to be put into the iButton Value field (above). When you click this button the program will ask you to select a button reader. After you select the button reader the program will let you touch an iButton and it will insert the iButton number into the iButton Value field.

In order to use this feature, your computer must be configured with the PAR Excellence button reader hardware. Contact PAR Excellence Technical Support for assistance configuring the hardware.

Secondary Locations

This area of the screen is used when there is an item stocked in multiple bins or storage sections. It might be an item that requires so much inventory that everything won't fit in one bin or it might be a location that is split up into logical areas (each area stocking the same items).

In PAR Excellence one of the bins is referred to as the **Primary Location** and any others are **Secondary Locations**. This concept is important whether you are using the PAR Bins weight based solution or the iButton or barcode solution.

Each of these storage locations must have a unique identifier so the system knows that there are multiple scales for one item so the quantity-on-hand for those scales must be accumulated or when iButton or barcode locations are being counted, the system must accumulate the counts for multiple bins.

If you have an item that will require multiple bins or will be in multiple storage areas, click the **Add** button at the bottom of the **Stock** tab to display the Item Secondary Location maintenance screen.

The fields on this screen are basically the same as those on the **Stock** tab itself. The information on the Stock tab is used to define the *Primary Location* and this information will define the *Secondary Locations*.

Secondary Location – *(optional)* This field can be used to name the secondary stocking location. It is generally only used when the secondary location is physically separated from the primary location (it would not be used when two bins are side-by-side because there is too much inventory to fit in one bin).

You can make your selection from the dropdown list if the secondary location name has already been defined or you can type a new name into the box and that name will be added as a new secondary location.

Shelf Location – *(optional)* Complete this field as described above for the Shelf Location of the primary location. Generally this is only used when the bins for the item are physically separated so the user can find the secondary location if the primary location is out of stock.

Scan Type – *(required)* This value should be the same as the selection you made for the Scan Type of the primary location.

Tracking Information – *(optional)* This value should be the same as the selection you made for the Tracking Information for the primary location.

Barcode Value – Refer to the Barcode Value description above for information about this field.

iButton Value – Refer to the iButton Value description above for information about this field.

Read Button Value – Refer to the Read Button Value description above for information about how to use this button.

Location Items Comments

On this screen you can add comments and “user field” values for the item at this location. This information is not used by the PAR Excellence system but you might need this information to be passed via the interface to the hospital MMIS system, etc. Contact the PAR Excellence Interface department for more information.

Location Groups

A Location Group is a way to group together two or more related locations for a variety of purposes. Many of the PAR Excellence function let you select either a Location or a Location Group so this makes it easier, in some cases, to manage the date for multiple related locations.

Some of the places in the PAR Excellence System where Location Groups are useful include:

- **Orders** – If a related group of locations will always send replenishment orders at the same time each day you can put them in a Location Group and use that group when you build the orders or when you set up the automatic order batch.
- **PAR Vision User Administration** – When you set up a user for the PAR Vision reporting tool you can limit the users access based on location. If a group of users should have access to a related group of locations (such as, all locations on the 3rd floor) you can put those locations in a Location Group and then assign the access to the group.
- **PAR Vision Data Analysis** – Most of the PAR Vision Data Analysis functions let you analyze the data for a single location or a group of locations. This will let you measure things like compliance and stock outs for a group of related locations as one entity.

When you select the function from the menu you will see a list of all the Location Groups currently defined. The buttons on this screen and the action they perform are:

Add – Use this button to create a new Location Group.

Edit – To change an existing Location Group (such as, to add an additional location to the group). Find the group name in the list and click on the group to highlight the row and click **Edit**.

Delete – Use this button to remove a Location Group that is no longer needed.

Location Group Maintenance

Enter the information for a Location Group as described below.

Facility – If you have access to more than one facility, select the facility for the Location Group.

Group Name – assign a name to the Location Group. This is usually something that describes why the locations in the group are related. For example, 3rd Floor Locations.

Exclude Listed Locations – Check this box if you want to select the locations that will NOT be in the group. This can be useful if the Location Group will contain all locations in the facility except for a few.

Using this feature can make it a little more difficult to manage your Location Groups since some groups will show the locations included in the group and some will show you the locations not in the group (and the group is everything else). It you use this option, be aware of the flag when you are maintaining your groups.

Locations – These are the locations that are part of the Location Group (or if the Exclude box is checked these are the locations that are NOT in the group).

To add a location to the group, click the **Add** button. Select the desired location from the list and click **OK**.

To remove a location from the group, click on the location name to highlight the row and click **Remove**.

Codes

This function is used to maintain all the miscellaneous codes that may be used when you set up Items, Replenishment Sources and Location Items. Each tab in the screen is used to maintain the acceptable values for one of the miscellaneous codes.

All of these codes are very simple containing a Name and Description or, in a couple of cases, a Name only.

Each tab has two action buttons:

- Add – Used to create a new entry for the code table identified by the tab.
- Edit – Used to change an entry.

There is no Delete button to remove a code. This is by design to insure database integrity. If you want to remove a code, contact PAR Excellence Technical Support and, after we insure that the code is not used in any table throughout the system, we will remove it for you.

Expense Center – This list appears in the General Information for a Location.

Expense Code – This list appears in the General Information for and Item and a Location Item.

Revenue Center – This list appears in the General Information for and Item and a Location Item.

Revenue Code – This list appears in the General Information for and Item and a Location Item.

Source Type – These are the Replenishment Source Types. Refer to [Source Type](#) below for additional information.

Unit of Measure – These are the names used for the two units of measure stored for an Item or Location Item. The same set of values are used for both the *Issue Unit of Measure* and the *Replenishment Unit of Measure*. The full unit of measure definition is the combination of one of these codes and the *Conversion Factor* that relates the issue unit to the replenishment unit.

Source Type

This are used to maintain the Replenishment Source types. The list contains two values:

- External – These types of Replenishment Sources are usually external to the hospital (such as, a vendor or supplier). If you are using a receipt confirmation interface, the system can be configured to create backorders for these replenishment sources.
- Internal – These types of Replenishment Sources are usually internal to the hospital (such as, a central supply room). If you are using a receipt confirmation interface, the system will never create a backorder for these replenishment sources.

If you use a “low unit of measure service” to replenish you supply locations, you will probably set it up as an Internal source (even though it is external to the hospital) since those services usually do not backorder items.

You should not add new items to the list. You can, however, edit these values to adjust the setting for **“Disregard blue label items already on order”**. This setting determines whether the system looks at the on-order quantity when building orders for items that have quantity-on-hand are managed by a PAR Bin scale or if the quantity-on-hand is managed by manually counting the item.

Under normal circumstances, this box would be unchecked (so the system would not order an item if there is an outstanding order for the item). This keeps you from over-ordering an item if the stock looks low but there

is new stock coming soon. Depending on your ordering schedule, however, you may want to turn this flag on so the system always orders based on the quantity currently in the bin regardless of outstanding orders.

Setting this option at the Replenishment Source Type level gives you the flexibility to manage Internal and External sources differently regarding open orders.

Print Item Labels

Using this function you can print labels to affix to the bin or shelf to identify the item stocked in that spot. These labels differ from labels you might print from your MMIS system (or another data source) because the machine readable information on the label is specific to the PAR Excellence system.

The labels can be printed for three different types of machine readable information:

- **iButton** – This machine readable information is not actually printed on the label but, rather, affixed to the label after it is printed. The label is printed leaving the exact amount of space open into which the iButton can be placed. Once the iButton is placed on the label it is associated to the item so the system knows the correct item when the button is touched.
- **Barcode** – This is a standard linear (1-dimensional) barcode that contains the PAR Excellence unique identifier for the item.
- **QR Code** – This is a matrix (2-dimensional) barcode that contains the PAR Excellence unique identifier for the item.

If you are using the PAR Excellence iButton system to manage your inventory, you will print iButton labels. If you are using the PAR Bin weight based system or the barcode solution from PAR Excellence you will print either Barcode labels or QR Code labels depending on the type of scanner you are using.

Most modern scanners can scan QR Codes but if you have an older scanner (that uses the straight line laser) you will need to use Barcodes. PAR Excellence Technical Support can help you decide which type of barcode you should print.

The Print Item Labels screen is broken into two sections.

- **Filter Criteria** – These options determine the items for which labels will be printed.
- **Output Format** – Use these selections to specify the format and content of the label.

The buttons on the screen and their actions are:

- **Print Preview** – This button appears if you are printing labels on a sheet of labels. The system will generate a PDF document with the labels situated on the document to perfectly match the perforated labels. You can print the document from your PDF viewer or save the document to be printed later.

Depending on the PDF viewer you are using you may need to change the default printing options to preserve the true format generated by the PAR Excellence system. We highly recommend printing a test page when you first use the Print Item Labels function to be sure the labels fit in the perforations (and adjust the viewer Print settings if they do not). PAR Excellence Technical Support can help you through this process.

- **Print** – This button appears if you are printing labels on a continuous feed roll of labels. In this case the labels are sent directly to the printer.
- **Edit Pending Flags** – This button will let you pick and choose the items for which you want to print labels. This feature is described in detail later in this chapter.

Filter Criteria

Use the fields described below to filter the list of items for which labels will be printed.

Facility – If you have access to more than one facility, select the facility for the labels to be printed.

Location Group – If you want to print labels for only items in a specific group of locations, select the Location Group from the dropdown list.

Location Name – If you want to print labels for only items in a specific location, select the Location from the dropdown list. Unless you are printing labels for a single item (see below) this is a field that would normally be selected since printing labels for all items at all locations in the facility could be a lot of labels.

Item Class – Many hospitals use the Item Class field (in Item Maintenance) to indicate the category for the items (such as; RESP, WOUND, IV, etc.). If you use the Item Class this way you can select one of these values so you can print labels for different categories of items on different colored labels. Select (All) to disregard Item Class when printing, select (None) to print labels for items that have not been assigned to an Item Class, or pick an Item Class value. PAR Excellence has a wide variety of label colors available. Contact PAR excellence Technical Support for more information.

Item Number – If you want to print labels for only a single item, enter the item number. It is not unusual to print labels for a single item if you have (All) Locations selected above. You might do this if you are adding a new item to a lot of locations or you made a significant change to the item description (or another piece of information on the label).

Location Type – There are three options for this selection **Primary**, **Secondary** or **Both**. Normally, you will use Both if you want to print labels for an entire location. This will insure that you get a label to put on every bin in the location.

Item Type – Select the appropriate item type for the labels to be printed. Typically, a hospital will print these different types of items on different colored paper so the users will have a visual clue of the type of item. In cases where a location has a combination of both **White** and **Blue/PAR Bins** items you will print two sets of labels while changing the label paper in between.

Scan Type – Select whether you are printing **iButton** labels, **Bar/QR Code** labels or **Both**. For the Bar/QR Codes the specific type (Barcode or QR Code) is defined in the label layout.

Charge Type – You can print labels for only **Chargeable** items, only **Non-Chargeable** items or **Both**. This option is provided because some hospitals print labels for Chargeable items versus Non-Chargeable items on different color paper.

Mfg. Barcode – This option lets you print barcodes only for items that have a manufactures barcode registered (**Registered**) or only items that do not have a manufactures barcode registered (**Unregistered**) or **Both**. Normally you will select Both or, possibly, Unregistered because you plan to use the manufacturers barcode for those items that are registered and you don't need the labels.

Pending Only – Check this box if you only want to print labels that have the Pending Flag set. When you make changes to the Location Item that affects the label the system will automatically set the Pending Flag. You can also manually set the Pending Flag for an item using the [Edit Pending Flags](#) button at the bottom of the screen.

Output Format

In this section of the screen you can make selections that affect the format of the label. Other than a couple miscellaneous pieces of information, these selections do not affect the content of the label. The label content is defined in the label layout created by the system administrator with the [Item Labels](#) function.

Label Name – Select the name corresponding to the label layout that you want to print. These layouts have been set up by your system administrator. The label layout tells the system the information to be printed on the label, the position of each piece of data on the label, the type of machine readable marking to be included on the label and whether the labels are printed on a sheet or on a continuous roll.

Talk to your system administrator about what Label Name you should select. If you have access to the PAR Admin application, refer to [Item Labels](#) for information about creating a label layout.

Sort Labels By – Select sort order of the labels from the dropdown list.

Label Printer – If you are printing labels on a continuous roll you must specify the name of the printer on which they will be printed (labels printed on a sheet are generated into a PDF document and you can print those labels on any print available to your PDF viewer). Refer to [Adding a Printer](#) for more information on defining the label printers.

Skip First x Labels – For labels that are printed on a sheet of 24 or 33 labels, it is possible to have left over labels on the sheet after you have completed a printing project. If you want to use the rest of the partial sheet, you can tell the system to skip the number of labels that have already been used.

Be aware that, as labels are removed from the sheet, the strength of the sheet is compromised and the partial sheet may jam in the printer. A sheet with only a few labels left will almost certainly not work.

Include

- **Location Name** – *(only available for labels printed on sheets)* If this is selected, the PAR Location where these labels will be placed is printed in the margin of the perforated sheet. It does not affect the labels themselves and is provided only to help you stay organized if you are printing labels for multiple locations.
- **Installer Data** – If the system administrator has defined the installer data as valid data for the selected layout, you can check this box to include that information on these labels. This is a string of characters that can assist you during the setup process. If you are reprinting a label after the setup is complete you may elect to leave this string off of the label.
- **Label Borders** – *(only available for labels printed on sheets)* If you select this option the program will outline the labels in the PDF to match the perforations on the label cardstock. This can be useful when doing a test print so you can see if the labels are being printed in the exact same format as generated on the PDF. If the printer is exactly replicating the PDF format, the outlines should not be visible on the label once it is torn off the sheet on the perforation.

Reset Pending – Check this box to reset the Print Pending Flags for the labels that are printed. Refer to [Edit Pending Flags](#) below for more information.

Edit Pending Flags

Click this button to see all items that match the [Filter Criteria](#).

Be aware that the **Pending Only** check box is part of the filter criteria so if you have that box checked you will see only items that already have the Pending Flag turned on. To see all items that match the filter criteria without regard to whether the Pending Flag is set, uncheck the Pending Only box before clicking the button.

Once the list of items is displayed, you can scroll through the list and pick and choose which labels you want to print by checking the **Pending** column. Once you have selected the labels to be printed click the **Close** button and then make sure the **Pending Only** box is checked and click the **Print** button.

On the Pending Flags edit screen you can check individual Pending boxes on the screen or use the **Select All** button to check all the Pending boxes on the screen or the **Deselect** button to uncheck all the boxes.

Adding a Printer

In order to print labels on **1" X 3" Self-Adhesive Continuous Feed** labels, you must define a printer that will support these specialty labels. The printer is defined in the **Devices** section of the PAR Agent. The computer where the Agent is running must have the printer defined in its Windows Devices and Printers.

If the printer is a shared (network) printer then you can define the printer on the Agent running on the server. If, however, the printer is locally attached to a workstation, you will need to setup a local Agent on the workstation where the printer is attached and define the printer.

Once you have decided which Agent will print the labels **Edit** the Agent and go to the **Devices** tab. Click the **Add** button below the Label Printers section to get the **Add Label Printer** pop-up screen.

- **Name** – Give the printer a name that the users will select when printing labels to this printer.
- **Facility** – Select the facility where the printer is located.
- **Printer Name** – Enter the exact name of the printer as it is displayed in the Windows Devices and Printer utility. To avoid and problems with Windows finding the printer, it is recommended that you match the case and spacing exactly as it appears in Windows.

Click the **OK** button to save the printer entry.

Items Without iButton

If you are using the PAR Excellence iButton system, this function will let you find items that do not have an iButton assigned. The program also lets you to assign an iButton those items so you can use the system to manage the quantity-on-hand for the items and create patient charges when an item is dispensed (if applicable).

You can search for items without an iButton using:

- **Facility** – If you have access to multiple facilities, select the facility where you want to look for missing buttons.
- **Location Name** – You can look at (All) items in all locations or you can search for items in a specific location.

After selecting the desired search fields, click the **Search** button.

The program will display a list of all items matching the search criteria that do not have an iButton assigned. If your computer has a Button Reader configured, select an item and click the **Assign iButton** button. A message will be displayed saying **“Touch iButton now ...”**. Use the button reader to touch an iButton and the value of that button will be assigned to the item.

Now you can print a label for the item and insert the label into a sleeve with that button attached and stick the sleeve to the bin.

Batch Reconciliation

The Reconciliation function is needed when you use the PAR Excellence barcodes system to manage the inventory in a location by scanning a barcode each time an item is taken from the bin. For each scan the system will decrement the inventory level by one. When the inventory level reaches the reorder point, a replenishment order will be produced for the item.

The system works very well as long as the users perform the requisite scans. Occasionally, however, a user will forget to scan the barcode and then the quantity on hand maintained by the system is inaccurate. The inaccuracies are corrected by physically counting the items in each bin and entering that count into the system. This count is referred to as reconciliation.

It is not necessary to ever do a physical count of the items if you are using the PAR Bins weight based system because the user is not responsible for telling the system when an item is used. The system automatically knows when items are removed from the bin based on the weight in the bin.

You use PAR Mobile to perform the reconciliation function. There are two options when reconciling items.

1. You can scan the item barcode to identify the item and then enter the number of items in the bin in the app and touch the Save button. The system now knows the exact quantity on hand for that item.

2. You can open a Reconciliation Batch and scan items into the batch. When scanning into a batch it is not necessary to enter a quantity as long as you scan the item barcode for each individual item in the room. This can be useful in a location such as an OR or Cath Lab where items are not always stored in discrete bins. When items are laying loose around the room it is usually easier to scan every package in the room and let the system determine how many of each item is in the room.

Reconciling in a batch is also easier when items require additional tracking information such as expiration date and lot number. If you scan the item, expiration date and lot number on every package in the room, the system can organize those scans and determine the total quantity for each items, as well as, the quantity for each date/lot combination.

To effectively use the Batch Reconciliation feature you will probably want to register the manufacturer's barcode for each item so you can scan the packages rather than the PAR Excellence label.

If you are scanning items into a batch you can use the Batch Reconciliation function in PAR Client to look at the contents of a batch that was created with PAR Mobile. In addition to looking at the contents of the batch, there are a few things you can do to change the batch as described below.

The Batch Reconciliation search screen shows you all the batches that have been created for a selected facility. You have a couple search options.

- **Facility** – If you have access to more than one facility, select the facility for the batches you want to review.
- **PAR Location** – You can review batches for a specific location or (All) locations.

The information displayed for each batch includes:

- **Location Name** – The name of the supply location for which the reconciliation was done.
- **Started** – The date and time the batch was created.
- **Finished** – If the batch has been committed, this is the date and time the batch was processed.
- **Expires** – The date and time the batch is due to expire or has already expired. By default a batch will stay open for 2 hours after it is created. You can extend that time when the batch is created or any time after is created (including after it has already expired).
- **Created by** – The user who created the batch. Usually, a supervisor with permissions to create a batch. After a batch is created, multiple users can scan reconciliation transactions into the batch.
- **Status** – The status of the batch as described below.
 - **Active** – The batch is currently open and users can scan reconciliation transactions into the batch.
 - **Expired** – The time limit for the batch has been exceeded. Refer to the information below about how to re-activate the batch.
 - **Committed** – The batch is finished and has been processed by the system.

The buttons that are available on this screen and the actions they perform are described below. Find the batch you want to work with and click on that line to highlight the line, then click the desire button.

- **Add** – Click this button to create a new Reconciliation Batch. Normally, the Batch will be created using PAR Mobile and then you can immediately start scanning transactions into the batch. This action is provided in case the supervisor doesn't have immediate access to PAR Mobile and you want to get the batch started for other users.
- **View** – You can look at the contents of the batch. There are also a few updates you can do to the batch that will be described in the next section.
- **Pause** – You can temporarily pause a batch so no transactions can be scanned into the batch.

- **Delete** – You can delete a batch. Any batch can be deleted but you should be cautious about deleting Active batches and even recently expired batches. There could be reconciliation transactions that need to be committed. Review the batch and if the batch needs to be committed, you can do that with PAR Mobile.

Add Batch Reconciliation

When you create a new reconciliation batch you simply identify the Facility and PAR Location where the reconciliation is to be done and set a date and time the batch will expire.

By default, the date/time the batch will expire is set for two hour from when it was created. You can change that immediately when creating the batch or any time after the batch has been created, including after it has expired.

View Batch Reconciliation

When you use the View button to look at the contents of a batch the Edit Batch Reconciliation screen is displayed. The batch header information on the screen includes:

- **Facility** – The name of the facility for which this batch was created.
- **PAR Location** – The name of the supply location for which this batch was created.
- **Created By** – The name of the user who created the batch.
- **Status** – The status of the batch as described below.
 - **Active** – The batch is currently open and users can scan reconciliation transactions into the batch.
 - **Expired** – The time limit set for the batch to stay open has been exceeded (prior to the batch being committed).
 - **Committed** – The batch is finished and has been processed by the system.
- **Error** – Indicates if there were any errors while scanning transactions into the batch.
- **Started** – The date and time the batch was created.
- **Finished** – If the batch has been committed, this is the date and time the batch was processed.
- **Expires** – The date and time the batch is due to expire or has already expired.

The detail information for each transaction in the batch includes:

- **Item Number** – The item number for the reconciliation transaction.
- **Description** – The description of the item.
- **Reconciled** – The date and time the reconciliation transaction was scanned into the batch.
- **Reconciled By** – The name of the user who scanned this transaction.
- **Quantity** – The quantity of the item being reconciled. If you are tracking expiration date and lot number in this location, the quantity relates to the item and any additional tracking information required for the item. For example, if the quantity of the item in the bin was 5 but 2 expired on one day and 3 expired on another, there will be two entries in the batch with quantities 2 and 3. The system will combine the lines to determine the overall quantity-on-hand and leave the lines separate when building the expiration date inventory picture.
- **Expiration date** – The expiration date scanned for the item (if required).
- **Lot Number** – The lot number scanned for the item (if required).
- **Status** – The status of the line as described below.

- **Added** – The transaction was cleanly added to the batch and will be processed when the batch is committed.
- **Pending** – The state of the batch was not Active when the transaction was added. This will happen most often when a user is in the process of scanning transactions when the batch expires. These items must be reviewed and added to the batch before they will be processed by the commit (see below).
- **Error** – An error occurred adding the transaction to the batch. Refer to the error message.
- **Error** – The error that occurred while trying to add the transaction to the batch.

Edit Batch Reconciliation

While you are viewing a batch, if the status of the batch is Active or Expired, there are a few changes you can make to affect the status and content of the batch.

- **Expires** – If the batch is active and getting close to the time when it will expire, you can change the Expires date/time to give you more time to complete your scanning.
 If the batch is already expired, you can change the Expires date and time to reactivate the batch. If another batch has been started for this location, however, the system will not reactivate the batch because there can only be one active batch for a location being reconciled.
- **Delete Transactions from the Batch** – If there is a transaction in the batch that is incorrect or if for any other reason you do not want to process that transaction, you can click on the transaction to highlight the line and click the Delete button to remove the transaction from the batch.
- **Add a Pending Transaction to the Batch** – If there are any pending transactions in the batch you can add those entries to the batch so they will be processed when the batch is committed. Click on the transaction to highlight the line and click the Add button to change the line status to “Added”.
 If the batch is already expired, you will have to change the Expires date/time to reactivate the batch in order to save the batch with the pending lines added.

Patient Management

Patient Management Overview

The functions in this section are used to manage the Patients to which the inventory items are dispensed. If you are using the PAR Excellence System only to manage your point-of-use inventory and you are not tracking the supplies given to a patient the topics in this section are not applicable to your implementation.

If, however, you are using PAR Express or the PAR Excellence Patient Display Boards to track which patient receives each item (for tracking or billing purposes), these functions will let you manage the patient information.

Patients – This function is used to add, change, move or remove Patients from the system. In most cases the functions provided by this utility are handled automatically by the interface between your admitting system and PAR Excellence but, on occasion, you may have to manually intervene.

Dispense Item – Use this function to identify the Patient who will receive an item taken from the inventory location. The PAR Excellence system offers several more automated ways for dispensing items to a patient but this function can be used if the automated tools are not convenient at the time you are doing the dispense.

Assign Pending Transactions – Pending transactions occur when the caregiver needs to dispense an item to a Patient before the patient admitting process has been completed. This function is used to assign those pending items to the correct patient once the patient has been fully admitted and the admission record has been sent to PAR Excellence.

Assign Exception Transactions – An exception will occur when you are tracking items to a patient but an item is removed from a bin and not assigned to a patient. This function let you assign these items to a patient if you know the patient to which they were dispensed.

Patient Charges – If you use a batch patient charge interface it is possible for a batch of charges to get lost or not processed if there is an error in the hospital patient charging system. This function will let you rebuild the charge batch file that was previously built so it can be resent to the hospital patient charging system.

Accept Suspended Batches – Suspended batches are created by the PAR Express patient charging system. A batch may be suspended for a few different reasons and, for certain types of suspended batches, this function can be used to accept the batch so the patient charges are sent to the hospital billing system.

Patients

Patients function allows the user to review, edit, admit, and discharge patients from the system. The first area of the window provides filters for finding any patient within the database. The user is able to search by facility, date range, patient number, and/or patient's name. These filters can be used in combination to help find patients more easily. If none of the filters are used then all patients will be displayed when clicking search.

Search Criteria

Facility - Choosing a facility will condense the search results to patients who were admitted to a particular hospital. This is useful for multiple hospitals that share a single database. If the hospital does not share a database then this field can be left in its default value.

Admit Date From - Define a date in this field and the results will show patients that were admitted on or after this date. This filter can be used with **Admit Date To** in order to view patients between certain dates.

Admit Date To - Define a date in this field and the results will show patients that were admitted on or before this date. This filter can be used with **Admit Date From** in order to view patients between certain dates.

Patient Number - This field searches using the patient's number. If a partial patient number is entered then the results will display any patients with the same numbers as a match.

Patient Name - This field allows for searches using the patient's name. The results will show any patient with the same name that is searched for. It can search by the patient's first, last, or partial name.

Include Discharge - By default, discharged patients do not appear in the search results. To include discharged patients simply check this box.

Once the filters have been populated, click on the **Search** button to view the results.

The search results will appear in a grid below the search criteria. The grid will populate with results once **Search** is selected. By default, the grid displays six columns. These columns are **Number, Name, Facility Name, Admit Date, MRN,** and **DOB**. Click on the right side of any of these column headers and it can alter the sort of the results by either **Ascending** or **Descending**.

Number - Patient's number

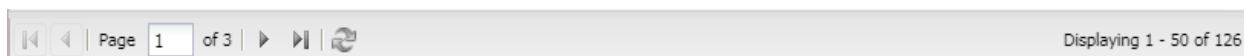
Name - Patient's name

Facility - The hospital they were admitted to

Admit Date - The date the patient was admitted

MRN - Patient's medical record number

DOB - Patient's date of birth



The search results will display 50 records at a time. The bottom right will display how many total records were found. The bottom left of the window will display how many pages are available and the ability to navigate to each one. The immediate arrow to the left and right of this field will navigate to the previous or next page. The second arrow to the left and right will skip to the last or first page of the results. The button on the far right is a refresh button; pressing this will reload the results.

Once the correct record is found, it can be selected. A double click will open the 'Edit Patient' menu. A single click on the patient will highlight the record. When the record is highlighted the buttons at the bottom of the screen can offer several operations. These buttons are **Transfer, Discharge, Edit,** and **History**.

Transfer – Manually move a patient to a bed location within the system

Discharge – Manually discharge a patient from the system

Edit – Make changes to the patient's medical record in the system

History – Will show the patient's history since they have been admitted. This will include transfers to beds and the items dispensed to them during their visit. The history is attached to the patient's number. A single patient with multiple numbers can have several different histories.

Admit Patient

Admit Patient can manually admit a patient into the database. This is used when the patient is not found in the system. There are four fields required when manually admitting a patient. The patient must be assigned to a facility, have a patient name, be an inpatient or outpatient, and have a patient number. All other fields are optional.

Facility – (required) Select the hospital they are admitted at

Patient Name – (required) Enter the patient's name

Patient Number – (required) Enter the patient's number

Patient Type – (required) Select inpatient or outpatient

Bed Location – (optional) Admits a patient into a bed in the system. The end user can manually type the bed into this field or view the available beds in the system by clicking the drop down arrow. There is a small check box to the right labeled "**Show occupied beds**". By default the system will display beds that are not currently occupied. If this box is checked it will display all of the beds in the system. Admitting a patient to an occupied bed will transfer the current patient out of it.

Date of Birth – (optional) Enter the patient's birth date

MRN – (optional) Enter the patient's medical record number

Physician – (optional) Enter a physician that is working with them

Procedure – (optional) Enter the patient's procedure that they are undergoing

User Field 1 - 4 – (optional) These fields are typically populated by the patient notice that the system receives. The notices contain certain codes in them about the patient. These fields can be used to identify and assign a patient to a patient set, most commonly used for outpatients. These can be edited in order to get the patient added to the correct patient set if they were not admitted automatically.

Once necessary fields have been entered click **Save** to admit them into the system.

Transfer Patient

Transfer Patient can manually transfer or assign a patient to a bed location in the database. The first three fields are informational and cannot be changed. These include the patient's number, the patient's name, and the bed they are currently admitted to. If the bed field is blank that means that they are not currently assigned to a bed in the system. The **New Bed Location** assigns them to the new bed. The bed location can manually be typed into this field, or the user can view the available beds in the system by clicking the drop down arrow and selecting one. There is a check box to the right labeled '**Show occupied beds**'. By default the system will display beds that are not currently occupied. If this box is checked it will display all of the beds in the system. Admitting a patient to an occupied bed will transfer the current patient out of it.

In this menu, select the **New Bed Location** and click **Save** to transfer the patient. This will assign the selected patient to the bed that was defined. Selecting the **History** button will open another window to the patient's history.

Edit Patient

Edit Patient can make changes to an existing patient in the database. At the top there are four fields that cannot be changed. These include the **Facility** the patient is at, their **Admit Date**, the current **Bed Location** they are assigned to, and their **Discharge Date**. Below these fields there are tabs named **General** and **Patient Sets**. The **General** tab contains fields that can be edited.

General

Patient Number - Edit the patient's number

Patient Name - Edit the patient's name

Patient Type - Edit the patient to either an inpatient or outpatient

Physician – Edit the patient's physician

MRN – Edit the patient's medical record number

Date of Birth – Edit the patient’s birth date. This can be manually entered or selected using a calendar by clicking on the box on the right of the cell.

User Field 1 - 4 – These fields are typically populated by the patient notice the system receives. The notices contain certain codes in them about the patient. These fields can be used to identify and assign a patient to a patient set, most commonly used for outpatients. These can be edited in order to get the patient added to the correct patient set if they were not admitted automatically.

Patient Sets

The **Patients Sets** tab will display what patient sets the patient has been added to previously. This tab is informational and cannot be changed. The tab displays four column headers.

Patient Set Name - The name of the patient set that the patient was admitted to.

Date Added - The date and time the patient was admitted to the set.

Scheduled Date – The date that the patient is set to remove from the patient set

Delayed Date – A patient set can be configured to retain a patient for a certain amount of minutes after their scheduled removal. This gives the department additional time to issue or credit items before the patient is removed from the set.

Patient History

Patient History report provides a patient’s history since they have been admitted with that patient number. History includes bed transfers as well as items dispensed to them during their visit. Patient history cannot be edited, this is an informational report. Sometimes a patient in the system may not have any history. This means that patient is in the database but they have not had any items dispensed to them and they have not been admitted to a bed since their visit.

Date/Time – The timestamp of when the activity occurred. This field uses military time.

Activity – This column will present the type of transaction that occurred. This can be a transfer into or out of a bed location or a transaction.

- **Into Bed** – When the patient was transferred into the bed location
- **Out of Bed** – When the patient was removed from the bed location
- **Dispense** – An item that was charged to the patient
- **Credit** – An item that was returned from the patient’s account. Can occur if an item was dispensed to the patient but they did not end up using the item.

Bed – This is the bed that the patient was assigned to during the transaction. If this column says Unknown then the patient was not assigned to a bed during the transaction. This is common to see when viewing an outpatient’s history.

Qty – The quantity of the item that was dispensed

Item Number – The item’s ID that was dispensed

Item/Procedure Description – A description of the item that was dispensed

Chargeable – If there is a check in this field that means that item is a chargeable dispense to the patient. If there is nothing in this field then the item that was dispensed is non-chargeable to the patient.

Location Name: The name of the location that the item was dispensed from

Beds/Display Management

Beds/Display Management Overview

The functions in this section are used to manage the patient Beds and the configuration of the Patient Display Boards which are used for the PAR Excellence iButton system. The bed entries simply represent the rooms/beds in the hospital. The beds are then assigned to a Patient Display Board which will be used by the caregiver to assign items to the patient in the bed.

If you are not using PAR Express or the PAR Excellence Patient Display Boards to track which patient receives each item (for tracking or billing purposes), these functions will be disabled in your system.

Beds – This function is used to add, change or remove Bed entries from the system. The beds names should be consistent with your admitting system so the system can find the bed in PA Excellence based on the information in the ADT message

PDB Panels – A Patient Display Board (PDB) Panel is a board that displays patient names that is used with the PAR Excellence iButton system. This function lets you configure those boards in the system.

PDB Locations – A Patient Display Board (PDB) location is a location at the hospital that contains one or more connected PDB Panels. These locations are related to a supply location and are often times named the same as the PAR Location.

Virtual Display Locations – A virtual display is used by the PAR Express patient charging application from PAR Excellence. The virtual display identifies the bed names that should appear on a PAR Express screen when it is used in an area where patients are assigned to rooms and beds.

Patient Sets – A patient set is a group of patients related to each other usually based on the hospital department that is caring for the patients (such as, an Emergency Department). Patient Sets are used to display patient names on a PAR Select board ora PAR Express in and area where patients are not assigned to in-patient rooms and beds.

Beds

Beds menu can **Add**, **Edit**, or **Delete** beds from the database. Select the **Facility** to add or edit an existing bed. By checking the **“Show Deleted”** box the results will show previously removed beds from the system. The **Bed Name** field can search for a specific bed in the system. This field can search by the full or partial bed name. The search results grid displays four columns.

Bed Name – The name of the bed in the system

Qualifier – Some hospitals use the same bed names in different areas. A bed qualifier can be defined to let the system know which bed, in which area, the patient should be admitted to. The bed qualifier is a code that the system can pull from the patient notice that it receives.

Created – The date that the bed was added to the system

Modified – The date that the bed was last changed on

The second tab in this menu is **Holdover Beds**. Holdover beds are not actual beds in the area; they are just temporary beds to allow additional dispenses to a patient after they are discharged. This tab shows the existing holdover bed groups. Holdover beds are named by the system and categorized by groups.

If you highlight an existing bed and select **Delete** it will remove the bed from the database.

Add Bed

Add Bed will add a new bed into the system. First choose the **Facility** the bed will be assigned to. Then enter the **Bed Name**. If needed, a **Qualifier** or **Accounting Group** can be added as well. Select **Add** at the bottom to put the new bed to an existing **PDB Location**. If a location is chosen by mistake, highlight it, and select **Remove**. It is important to add the bed in the system in the same format that the bed is defined in the patient notice. The system will only assign patients to a bed if their notice matches the existing bed perfectly. Once done select **Save**.

Bed Name – The name of the bed to be added

Qualifier – Some hospitals use the same bed names in different areas. A bed qualifier can be defined to let the system know which bed, in which area, the patient should be admitted to. The bed qualifier is a code that the system can pull from the patient notice that it receives.

Accounting Group – Optionally you can assign beds to a group and then run reports that group the activity related to the beds by these groups. Enter the same group name for all beds you want related together.

Display Location Name – The patient board location that this bed should appear on

Edit Bed

Edit Bed can alter an existing bed in the system. In this menu the **Bed Name**, **Qualifier**, **Accounting Group**, and the **Display Location Name** can be changed. The bed cannot be changed to another facility.

Bed Name – Edit the existing bed name

Qualifier – Edit the existing qualifier for the bed. Some hospitals use the same bed names in different areas. A bed qualifier can be defined to let the system know which bed, in which area, the patient should be admitted to. The bed qualifier is a code that the system can pull from the patient notice that it receives.

Accounting Group – Optionally you can assign beds to a group and then run reports that group the activity related to the beds by these groups. Enter the same group name for all beds you want related together.

Display Location Name – Add or remove a Patient Display Location for the bed. This is the patient board location that this bed should appear on.

Once done making the changes select **Save**.

Add Holdover Bed Group

When a patient is discharged from a bed, our system can move them to a **Holdover Bed**. This allows a new patient to be admitted to the actual bed while allowing nursing to continue dispensing to the patient that was discharged. Holdover beds are not actual beds in the area; they are just temporary beds to allow additional dispenses to a patient after they are discharged. This menu allows you to create these beds and assign them to a live PDB Panel. Fill out the required fields and click **Save** when finished.

Facility – Choose the hospital for this bed group

Group Name – Name the group of beds that you are creating. It is recommended to name the group after the location they will be assigned to.

Bed Count – Enter the amount of holdover beds that you want to create

Auto-Removal Interval – Choose how many minutes to hold these patients on the holdover bed after they have been discharged from the unit.

Remove Oldest – Check this box to remove the oldest patient first if the all of the holdover beds are in use.

Once you have entered the required fields click **Add** to assign them to an existing location.

After adding those to a location click **Save**.

Edit Holdover Bed Group

When a patient is discharged from a bed, our system can move them to a **Holdover Bed**. This allows a new patient to be admitted to the actual bed while allowing nursing to continue dispensing to the patient that was discharged. Holdover beds are not actual beds in the area; they are just temporary beds to allow additional dispenses to a patient after they are discharged. This menu allows you to create these beds and assign them to a live PDB Panel.

Facility – Edit the hospital for this bed group

Group Name – Update the name the group of beds that you are creating. It is recommended to name the group after the location they will be assigned to.

Bed Count – Change the amount of holdover beds that you want to create

Auto-Removal Interval – Choose how many minutes to hold these patients on the holdover bed after they have been discharged from the unit.

Remove Oldest – Check this box to remove the oldest patient first if the all of the holdover beds are in use.

Once you have entered the required fields click **Add** to assign them to an existing location.

After adding those to a location click **Save**.

PDB Panels

PDB Panels can **Add**, **View**, and **Delete** patient display boards (PDB) in the system. **Panel Name** can search for a panel using the full or partial serial number. The grid will display six columns. These include **Name**, **PDB Location**, **Primary**, **Type**, **Status**, and **Modified**.

Name – The patient display board's serial number. This is located on a sticker on the bottom of the board.

PDB Location – The location where the board is installed

Primary – We have primary and secondary boards. A secondary board is an auxiliary board that is attached to the primary board. Both types of boards are added in this menu. A check in this column means that the board is the primary.

Type – This is the type of board it is. There is a variety of different board types.

Status – This tells if the board is online or offline. Online means the board is in use at a location. Offline is a board that is not in use and not communicating with the system.

Modified – Displays the last date the board was modified on

Highlight and select **View** on a record and it will display details on how that board is configured in the system.

Highlight and select **Delete** to remove a board from the system.

View PDB Panel

View PDB Panel displays how a board is configured in the system. This report is informational only, it cannot be edited.

Panel Name – The patient display board's serial number

Primary Panel – There are primary and secondary boards. A secondary board is an auxiliary board that is attached to the primary board. Both types of boards are added in this menu. A check in this column means that the board is the primary.

Network Connection – A check in this box indicates that it is an Ethernet board. No check in this box will mean that the board is an auxiliary board (also known as a secondary board).

MAC Address – This is the Ethernet ID of the board

Fixed IP Address – The board's IP is static and not DHCP. Typically this field will always be checked for a primary board.

IP Address – The fixed IP address that is loaded into the board

Panel Type – The type of board it is

Number of Beds – How many beds the board contains

At the bottom of this menu it will show what location, if any, the board is currently assigned to.

Add PDB Panels

Add PDB Panels is used for installing a new board into the system. Fill out fields with the correct information.

Panel Name – The patient display board's serial number. This is located on a sticker on the bottom of the board.

Primary Panel – There are primary and secondary boards. A secondary board is an auxiliary board that is attached to the primary board. Both types of boards are added in this menu.

Network Connection – A check in this box indicates that it's an Ethernet board. No check in this box will mean that the board is an auxiliary board. If you select this then the **MAC Address** field is required.

MAC Address – This is the Ethernet ID of the board. This can be found on the back of the board.

Fixed IP Address – The board's IP is static and not DHCP. Typically this field will always be checked for a primary board. If you check this then the **IP Address** field is required.

IP Address – Enter the IP address that is loaded into the board

Panel Type – Choose the type of board it is from the drop down menu

Number of Beds – How many beds the board contains; this field populates automatically based off the **Panel Type** that was chosen.

Register iButtons – Click this to register a board with iButtons into the system. This is required for all iButton boards. This process adds each button to the database and assigns it a value (e.g. This button is bed 1, 2, 3, etc.).

Select **Save** when finished.

Register iButtons

Register iButtons is the function that assigns each button on a board a value in the system. The registration allows the system to know what each button is on a board. The registration requires a button reader to complete the registration. When ready to register, press the start button. Once you start the process take the button reader and tap the buttons on the board from left to right, top to bottom. You must register the buttons in this sequence. Once done, the buttons will be registered and the board is ready to be assigned to a location.

PDB Locations

PDB Locations allows the user to **create**, **edit**, **delete**, and **assign** a PDB panel to a location in the hospital. Locations with boards assigned to them will appear in this menu. Existing PDB locations can be viewed by the facility they are assigned to or by their location name. Existing PDB Locations can be edited, assigned new beds, reset, or even deleted.

Location Name – The name of the supply location where the PDB is located.

Facility Name – The facility where the board is installed

Status – A PDB can either be online or offline. This is the status of the location. Setting a board online tells the system that the board is online and active. Setting a board offline tells the system that the board is not active and should not be communicating.

Created – The date the board was assigned to a location in the system

Modified – The date that the last time the entry was updated

Add PDB Location

Add PDB Location allows the user to assign a registered board to a location in the facility.

Facility – The hospital where the board will reside

Location Name – A description of where the board will be set

Location Status –

Online – Indicates that this board is installed in the unit and should be actively communicating

Offline – Board is not installed and should not be communicating

Test Mode – Board is not live but should be communicating to ensure the board is ready for go-live

Primary Panel – The serial number of the PDB. Click the select button and choose the serial number of your board.

PAR Location – The location where the PDB is installed

First Auxiliary Panel – The serial number of the auxiliary PDB. 28 bed PDB panels can have a second board added to them to display more beds. This is done when the Primary panel is unable to display all the necessary beds. These boards communicate through the primary panel and are directly attached. The auxiliary can display beds from the same different unit by selecting the PAR location they are assigned to.

Second Auxiliary Panel – The serial number of the second auxiliary panel at this location. If two panels aren't enough for the amount of beds in the unit a second auxiliary can be attached.

IP Address – The IP address assigned to the board

Dial-Up Number – The extension for the dial up board

Patient Set – If assigning a PAR Select board, then select what patient set to display on the unit

Holdover Bed Group – If the beds on the PDB are part of a Holdover Bed group, select the group from the dropdown list.

Patient Name Format – A drop down selection chooses how patients are displayed on the board. If this is grayed out then the PDB is not eligible for this.

Retain Patient Name – User can define how long a PDB keeps a patient's name displayed on it after the patient is discharged.

Number of downloader – Select how many downloaders will be attached to the board

Downloader w/ keypad – A downloader with a keypad will display the patient information on the board when someone touches or waves their hand in front of the downloader. Only downloaders with keypads can do this. The downloader will say 'Touch Here' on the front if it is able to do this. By checking this box the patient names on the board will be hidden until someone gestures the downloader.

Backlight Timeout – Define the amount of seconds until the backlight turns off

Name Display Timeout – The amount of seconds until the patients become hidden again.

Once all the fields are filled out select Save create the new PDB Location.

Edit PDB Location

Edit PDB Location allows the user to edit an existing PDB location in the system.

Facility – The hospital that the board resides at

Location Name – A description of where the board is installed

Location Status –

Online – Indicates that this board is installed in the unit and should be actively communicating

Offline – Board is not installed and should not be communicating

Test Mode – Board is not live but should be communicating to ensure the board is ready for go-live.

Primary Panel – The serial number of the PDB. Click the select button and choose the serial number of your board.

PAR Location – The location where the PDB is installed

First Auxiliary Panel – The serial number of the auxiliary PDB. 28 bed PDB panels can have a second board added to them in order to display more beds. This is done when the Primary panel is unable to display all the necessary beds. These boards communicate through the primary panel and are directly attached. The auxiliary can display beds from the same different unit by selecting the PAR location they are assigned to.

Second Auxiliary Panel – The serial number of the second auxiliary panel at this location. If two panels aren't enough for the amount of beds in the unit a second auxiliary can be attached.

IP Address – The IP address assigned to the board

Dial-Up Number – The extension for the dial up board

Patient Set – If assigning a PAR Select board, then select what patient set to display on the unit

Holdover Bed Group – If the beds on the PDB are part of a Holdover Bed group, select the group from the dropdown list.

Patient Name Format – A drop down selection chooses how patients are displayed on the board. If this is grayed out then the PDB is not eligible for this.

Retain Patient Name – User can define how long a PDB keeps a patient's name displayed on it after the patient is discharged.

Number of downloader – Change how many downloaders are attached to the board

Downloader w/ keypad – A downloader with a keypad will display the patient information on the board when someone touches or waves their hand in front of the downloader. Only downloaders with keypads can do this. The downloader will say 'Touch Here' on the front if it is able to do this. By checking this box the patient names on the board will be hidden until someone gestures the downloader.

Backlight Timeout – Amount of seconds until the backlight turns off

Name Display Timeout – Amount of seconds until the patients become hidden again.

Once all the fields are filled out select Save create the new PDB Location.

System Operations

System Operations Overview

The functions provided in this section let you manage the scheduled jobs that are setup in the PAR Excellence system. These tasks are generally performed by a system administrator who is familiar with which jobs are scheduled to run and when they run.

The functions in the group include:

Batch Jobs – These are the jobs that are setup to run automatically without any user intervention. These jobs may run at a certain time each day or they may run at a regular interval throughout the day (for example, once every 60 minutes). This function is used to setup your automatic order jobs, as well as, other important automatic jobs.

Interactive Jobs – These are semi-automated jobs that run only on demand. The jobs in this category are normally customized to your installation so the purpose of these jobs will vary from hospital to hospital.

Queues – The Queues window displays any job waiting to be processed by PAR Agent. The window contains a tab for each job type with each tab containing a grid displaying the details about each request in the queue.

Identify iButton – This function can be used to determine if an iButton is defined in the system. This is useful if you want to check if a board has been registered or if you have a loose iButton and you want to find out where it belongs.

Batch Jobs

This function is used to maintain the automatic jobs that run in the PAR Excellence system. These jobs include:

- **Order Batch Jobs** – The jobs that run at scheduled times each day to generate the replenishment orders for the supply locations.
- **Charge Batch Jobs** – If you are using PAR Excellence to capture patient charges and you use a batch charge interface, you can set up the job on this screen.
- **Issue Batch Jobs** – If you use the PAR Excellence Issues interface, you can use this screen to set up the interface job.
- **Custom Batch Jobs** – As the name implies, the jobs you set up on this screen are custom to your hospital. If you have a custom job that was developed for you contact PAR Excellence Technical Support for assistance setting up the job.
- **No Auto Order Dates** – The system lets you specify dates that you do not want to generate any orders that would normally be built on that date. You would use this, for example, on a major holiday.

Order Batch Jobs

This function is used to set up one or more jobs to automatically generate replenishment orders for the supply locations being managed by PAR Excellence. The most effective way to run the system is to use automatic order, as well as, the other automated jobs described in this chapter to let the system run itself as much as possible.

To create a new automatic order job, click the **Add** button and complete the fields on the screen as described below:

- **Job Id** – This is a system generated field that gets populated when the job runs.
- **Last Run date** – This is a system generated field that gets populated when the job runs.
- **Job Name** – Enter a name for the Order job. Give the job a name that you will recognize if you see the job in the Queue.
- **Batch Type** – You can generate automatic *Full* orders or *Critical* orders. A strategy some hospitals use is to generate full orders early in the morning to get the room fully stocked for the day and then generate critical orders late in the day to replenish only the items that have had heavy use throughout the day (to insure there is not a stock-out overnight).
- **Item Type** – You can setup the job to only generate orders for certain items (based on item type) or you can generate for all items by selecting *Both* (recommended).
- **Batch Name** – If you want to assign a batch name for all orders generated by this job, enter the name here (optional).
- **Facility** – If you have access to more than one facility, select the facility for this job.
- **PAR Location Group** – If you have setup Groups of related locations, you can select a group name from the dropdown list and the job will create order for all locations in the group. Only PAR Location Group **or** PAR Location can be specified.
- **PAR Location** – If you want this job to generate orders for just one location, you can select the location from the dropdown list. Only PAR Location Group **or** PAR Location can be specified.
- **Replenishment Type** – If you want this job to only generate orders for *internal* sources or *external* sources, make the selection here. Only Replenishment Type **or** Replenishment Source can be specified.
- **Replenishment Source** – If the job should only generate orders for a specific replenishment source, select the source from the dropdown list. Only Replenishment Type **or** Replenishment Source can be specified.
- **Alternate Reorder %** - If you specify a single replenishment source you can (optionally) override the Reorder percentage defined for that source.
- **Run After** – If you use the PAR Excellence iButton system you can set up a job to generate orders for a location immediately after a *Requisition* or *Reconciliation* is downloaded. Contact PAR Excellence Technical Support for more information about this feature.
- **Run Job** – Select the frequency that you want this job to run.
 - Select *Daily/Weekly* if you want the job to run every day or selected days during the week.
 - Select *Monthly* if this job will only be run once a month. The exact days the job will run is set up on the Schedule (see below).

Add Schedule

After you have selected the fields that determine which orders will be generated, you create the order schedule. Click the **Add** button to begin building the schedule.

Daily/Weekly – If you selected to build orders daily/weekly the Add Job Schedule screen will let you pick which day(s) of the week the job will run and the time of day the job will run.

- Select *Every Day* if the job is to run all seven days of the week.
- Select *Weekdays* to run the job Monday through Friday.
- Select *Other* to pick and choose the days the job will run. Check the box next to each day the job should run.

Monthly – If you selected to run the job once a month the Add Job Schedule screen will let you pick the day of the month the job will run. Normally you will run a monthly job on the first day of the month or the last day. Enter Day of Month=1 to run the job on the first day of the month or check the End of Month box to run the job on the last day of the month. You can also pick another day if you want.

Run Time – Enter the time of day you want the job to run on the scheduled day(s). The dropdown list has times that can be selected in 15 minute increments but you can enter any time you want to the box (for example, 6:05AM).

After you have made all your selections on the **Add Job Schedule** screen click **OK** and the schedule will be build.

Edit Schedule

To change the schedule click one of the lines in the schedule to highlight the line and click the **Edit** button. Change the selections on the Edit Job Schedule screen to reflect the new schedule.

To remove a single day from the schedule, click the line to be deleted and click the **Delete** button.

You can also put any, or all, days in the schedule on hold. This will keep the job from running on that day/time until the hold is released. Click the line to put on hold and click the **Hold** button. If you are putting a job on hold for only one day don't forget to release the hold the next day or the job will not run again the following week.

If you want to suspend orders for a location due construction it is better to set the “Do not build orders for this location” flag in the [Item Locations](#) function rather than trying to put all the automatic jobs for that location on hold. When the construction is complete you can resume ordering by changing one flag rather than trying to find and release all the jobs.

View Schedule

To see a graphical view of when your scheduled jobs will be run each day you can use the **View Schedule** button at the bottom of the screen. This can be useful if you have a lot of scheduled jobs and you want to make sure they are efficiently spaced out through the day.

The PAR Agent which will run these jobs is a multi-threaded process so it can handle multiple jobs scheduled at the same time but computers have a fixed number of resources and if too many things are running at the same time everything will run slower.

The Job Schedule screen includes a few fields that you can select to use to identify the specific schedules to be viewed.

- **Facility** – If you have access to more than one facility, you can select the facility for the schedule(s) you want to view. If you are a super-user with access to all facilities, you can select (All) to see the full picture of the jobs that will run on the server.
- **Job Type** – You can select a specific job type to view or you can select (All) to see all scheduled jobs on the same screen. Using the (All) selection is the best way to use this screen if you are trying to balance the jobs in the schedule.
- **Job Name** – You can select a specific job name or select (All) to see all the jobs in the schedule.

- **Include jobs on hold** – Check this box to include the jobs that are currently on hold. Depending on how long you intend to keep these jobs on hold, including these jobs may give you a better picture of the upcoming schedule.

After making your selections, click the **View Schedule** button. The program will display all (selected) jobs in a bar graph on the screen by hour of the day for each day of the week. Ideally, there won't be a large number of jobs running in any one time slot. If you see a crowded time slot you might think about moving one or more of the jobs at that time to a different time slot.

Charge Batch Jobs

If you are using the PAR Excellence system to capture patient charges and you are using a batch charge interface (versus a real-time charge interface) you can use this function to setup the job to build the charge batch. The job can be setup to run on a schedule or to run periodically (every xx minutes) or it can be setup to be run only on demand.

To create a new charge batch job, click the **Add** button and complete the fields on the screen as described below:

- **Job Id** – This is a system generated field that gets populated when the job runs.
- **Last Run date** – This is a system generated field that gets populated when the job runs.
- **Job Name** – Enter a name for the Order job. Give the job a name that you will recognize if you see the job in the Queue.
- **Batch Name** – If you want to assign a batch name for all orders generated by this job, enter the name here (optional).
- **Facility** – If you have access to more than one facility, select the facility for this job.
- **Filter Expression** – Additional information that can be used for certain Patient Charge interfaces. Contact the PAR Excellence Interface department for more information.
- **Interface** – Select the Patient Charge interface used by your facility. If you are uncertain which interface to choose, contact the PAR Excellence Interface department.
- **All Outpatients Chargeable** – Check this box override the charge/non-charge flag for outpatients.
- **Printer Name** - the PAR Excellence Interface department If the interface you are using is a hardcopy printout you can (optionally) specify the printer on which it should print. The printout will contain PHI so you may want to specify a printer in a secure area.
- **Interface Options** – These are options that will be passed to the Patient Charge interface program. The PAR Excellence Interface department will also work closely with you to setup these options. It is generally recommended that you do not make changes to this information without contacting PAR Excellence first.
- **Run Job** - Select the frequency that you want this job to run.
 - *Select At regular intervals* to run the job every xx minutes.
 - *Select Daily/Weekly* if you want the job to run every day or selected days during the week.
 - *Select Monthly* if this job will only be run once a month. The exact days the job will run is set up on the Schedule (see below).
 - *Select Manually* to indicate the job will be run only on-demand. A user (usually a supervisor) will select the job and click the Run button.
- **Execute Every xx minutes** - If you select **“At regular intervals”** you can now specify the interval at which the job will be run. For example, to run the job once an hour enter 60.

- **On Hold** – If you select “*At regular intervals*” you can use this check box to temporarily put this job on hold.

If you have selected Daily/Weekly or Monthly the schedule is built the same as was described for Order Batch Jobs. See the sections [Add Schedule](#) and [Edit Schedule](#) for more information.

Issue Batch Jobs

This tab is used to maintain the batch jobs for the PAR Excellence **Issues Interface**. The Issues interface can be if you use a Materials Management system that maintains the quantity-on-hand for the point-of-use locations (in addition to those on-hand values being maintained in PAR Excellence). It is more common for the quantity-on-hand to be maintained only in PAR Excellence so the Issues Interface is not necessary.

The Issues Interface sends transactions to the Materials system to reflect when items are dispensed to a patient or received via an order so the materials system can update the QOH accordingly. This interface can be setup to run in real-time mode so updates are sent immediately when the QOH changes or it can be set up for batch mode and send net changes just a few times a day.

If your hospital uses this interface, to create a new issue batch job, click the **Add** button and complete the fields on the screen as described below:

- **Job Id** – This is a system generated field that gets populated when the job runs.
- **Last Run date** – This is a system generated field that gets populated when the job runs.
- **Job Name** – Enter a name for the luuse job. Give the job a name that you will recognize if you see the job in the Queue.
- **Batch Name** – If you want to assign a batch name for all issues generated by this job, enter the name here (optional).
- **Facility** – If you have access to more than one facility, select the facility for this job.
- **Interface** – Select the Issues interface used by your facility. If you are uncertain which interface to choose, contact the PAR Excellence Interface department.
- **Interface Options** – These are options that will be passed to the Issues interface program. The PAR Excellence Interface department will also work closely with you to setup these options. It is generally recommended that you do not make changes to this information without contacting PAR Excellence first.
- **Run Job** - Select the frequency that you want this job to run.
 - *Select At regular intervals* to run the job every xx minutes.
 - *Select Daily/Weekly* if you want the job to run every day or selected days during the week.
 - *Select Monthly* if this job will only be run once a month. The exact days the job will run is set up on the Schedule (see below).
 - *Select Manually* to indicate the job will be run only on-demand. A user (usually a supervisor) will select the job and click the Run button.
- **Execute Every xx minutes** - If you select “*At regular intervals*” you can now specify the interval at which the job will be run. For example, to run the job once an hour enter 60.
- **On Hold** – If you select “*At regular intervals*” you can use this check box to temporarily put this job on hold.

If you have selected Daily/Weekly or Monthly the schedule is built the same as was described for Order Batch Jobs. See the sections [Add Schedule](#) and [Edit Schedule](#) for more information.

Custom Batch Jobs

A Custom Batch Job is a job that was created to satisfy a unique need at your hospital. The PAR Excellence Technical Support team can explain the purpose of any custom jobs installed on your system.

If a Custom Job is available on your system, you can create a schedule to run the job or set up the job to be run on-demand (manually). To create a new custom job batch job, click the **Add** button and complete the fields on the screen as described below:

- **Job Id** – This is a system generated field that gets populated when the job runs.
- **Last Run date** – This is a system generated field that gets populated when the job runs.
- **Job Name** – Enter a name for the job. Give the job a name that you will recognize if you see the job in the Queue.
- **Facility** – If you have access to more than one facility, select the facility for this job.
- **Custom Job Class** – Select an entry from the dropdown list. If there are no entries in the list then there are no custom jobs available for your hospital. Contact the PAR Excellence Interface department for more information.
- **Parameters** – The parameters are specific to the Custom Job. All, some or none may be required. Contact the PAR Excellence Interface department for information about how the parameters should be completed.
- **Run Job** - Select the frequency that you want this job to run.
 - *Select At regular intervals* to run the job every xx minutes.
 - *Select Daily/Weekly* if you want the job to run every day or selected days during the week.
 - *Select Monthly* if this job will only be run once a month. The exact days the job will run is set up on the Schedule (see below).
 - *Select Manually* to indicate the job will be run only on-demand. A user (usually a supervisor) will select the job and click the Run button.
- **Execute Every xx minutes** - If you select “*At regular intervals*” you can now specify the interval at which the job will be run. For example, to run the job once an hour enter 60.
- **On Hold** – If you select “*At regular intervals*” you can use this check box to temporarily put this job on hold.

If you have selected Daily/Weekly or Monthly the schedule is built the same as was described for Order Batch Jobs. See the sections [Add Schedule](#) and [Edit Schedule](#) for more information.

No Auto Order Dates

This screen lets you specify dates that you do not want to generate any orders that would normally be built on that date. You would use this, for example, on a major holiday. You can enter the dates as far into the future as you want and on that date, none of the auto-order jobs will be run.

To add a date, click the **Add** button and complete the screen as described below.

- **Date** – Enter the date you do not want some, or all, of the automatic orders to be processed. You can also use the calendar icon to pick the date from the calendar. You cannot enter a date in the past. You can enter today to stop orders that have not yet run today. Or, you can pick any future date.
- **Facility** – Select the facility where the order will not be run.
- **PAR Location Group** – If you have set up [Location Groups](#) and you only want to stop the orders for the locations in one of those groups, select the group.

- **PAR Location** – If you only want to stop the orders for one location, select the location.

Once you have entered your information, click the **Save** button.

The buttons on the screen and their actions are described below.

- **Add** – Add a new date to stop the automatic orders.
- **Edit** – Change a date that automatic orders should not be run.
- **Delete** – Remove a date from the list. It can be an old date or a date in the future.
- **Delete Past** – You can use this button to remove all old dates from the list. The Par Excellence Monitor program will also automatically purge old dates after 10 days (your system administrator can change this setting if needed).

Interactive Jobs

These are semi-automated jobs that run only on demand. The jobs in this category are normally customized to your installation so the purpose of these jobs will vary from hospital to hospital. For example, PAR Excellence may develop a custom interactive job for your hospital to generate a text file that duplicates the output from a handheld device used to count the inventory. You can use this file as input to a system that processes the handheld download files.

To add a new Interactive Job, click the **Add** button at the bottom of the screen.

- **Job Id** – This is a system generated field that gets populated when the job runs.
- **Last Run date** – This is a system generated field that gets populated when the job runs.
- **Job Name** – Enter a name for the job. Give the job a name that you will recognize when you are selecting a job to be run.
- **Facility** – If you have access to more than one facility, select the facility for this job.
- **Custom Job Class** – Select an entry from the dropdown list. If there are no entries in the list then there are no interactive jobs available for your hospital. Contact the PAR Excellence Interface department for more information.
- **Parameters** – The parameters are specific to the Interactive Job. All, some or none may be required. Contact the PAR Excellence Interface department for information about how the parameters should be completed.

You can also **Edit** or **Delete** existing Interactive Jobs.

To run an interactive job, click on the Job Name for the job and click the **Run** button. The job will be run based using the parameter values you have defined for the job and generate the output that was defined for the job.

More than likely you will be prompted by the browser to Open or Save the output when the job is complete. The PAR Excellence Technical Support team can help explain how you should use the output generated by the Interactive Job.

Queues

This window displays any job waiting to be processed by PAR Agent. The window contains a tab for each job type with each tab containing a grid displaying the details about each request in the queue.

As jobs are put into the queue the PAR Agent will pick up the job and run it. Once the job has completed successfully, the job will be removed from the queue and the next job in the queue will be run.

Normally you will only use the Queues function when a job that was expected to be run at a certain time of the day has not been run. You can look at the queue for the particular job type to try to diagnose the problem. Following are some typical scenarios you may see in the queue.

- The job is still in the queue with a message in the Error column. This indicates that the PAR Agent tried to run the job but there was an error. The message in the Error column will tell you what went wrong.
- There are several jobs in the queue and the one you are waiting for is not at the top. This can happen during peak hours of the day when multiple jobs are being submitted at the same time. As the jobs ahead of your job are run and removed from the queue, your job will eventually be run.
- The job is in the queue with no jobs ahead of it and no error message. In this case, ask your system administrator to check the status of the PAR Agent. It is possible that someone paused the Agent and forgot to restart it or maybe some other error has occurred with the PAR Agent.

Available actions for this function include:

- **Auto-Refresh** – This box is checked by default so the screen will refresh every 10 seconds so you can see what has finished and what has started next. Turn off the auto-refresh by unchecking this box.
- **Refresh** – Use this button to manually refresh the screen.
- **Reset** – If a job has ended with an error (a message is displayed in the Error column) you can resubmit the job after you have corrected the error. Highlight the job to be resubmitted and click the Reset button.
- **Delete** – if there is a job in the queue that you do not want to run, highlight the job and click the Delete button. This is often used for a job that ended with an error if you cannot correct the error or you have already made other arrangements to generate the output from this job.

Job Queue

When it is time to run on of the jobs that were setup in the [Batch Jobs](#) function the job scheduler will put an entry in this queue. When the PAR Agent is available it will pick up the next job in the queue and run the job.

If multiple batch jobs are scheduled to run at the same time, you may see multiple entries in the queue but the Job Name should identify each job.

Order Extract Queue

This queue will contain orders that have been built and are waiting to be extracted. All orders in PAR Excellence are built the same but the format in which they are extracted can vary based on the replenishment source. The PAR Agent will pick up each job in the Order Extract Queue and pass it to the appropriate extract program. For example, some orders may be extracted as a printed pick ticket and others may be extracted as an interface file to be sent to the MMIS system.

Order Extract jobs can be generated by PAR Client using the Ordering function or they can be generated by PAR Agent because of an automatic Order Batch job. Orders will be extracted in the order that they are put into the queue.

Order Receipt Queue

If a replenishment source uses a receipt interface a job will be put into this queue when an order for that source is received. The PAR Agent will pick up each job in the Order Receipt Queue and pass it to the appropriate receipt interface program.

Most replenishment sources will probably not use a receipt interface. The PAR Excellence Interface team can tell you if you should ever expect to see any jobs in this queue.

Print Queue

When a request is made to print labels on a specialty printer that supports continuous feed labels, PAR Client puts a job in the Print Queue. The PAR Agent that has access to the selected printer will pick up the job and print the labels.

More information about creating labels to use a specialty printer can be found in the [Building a Label Layout](#) section of this manual. Information about adding a printer to the PAR Agent can be found in the [Adding a Printer](#) section.

Identify iButton

This function will let you identify how an iButton is registered the system. Every iButton contains a unique identifier. The identifier is meaningless until you register the iButton to be used for a specific purpose. An iButton can be registered using several different functions in the system. For example, the iButtons attached to a PAR Display Board are registered using the [PDB Panels](#) function in the **Bed/Display Management** menu and iButtons used to identify an item are registered using the **Stock** tab in the [Item Locations](#) function in the **Item Maintenance** menu..

This function cannot register an iButton but it can be used to determine if an iButton has already been registered. For example, if you have a Patient Display Board and you do not know if it has been registered, use this function to touch each button on the board. The utility will tell you if the iButton is not registered or the specific position on the board to which it is registered.

Normally, if you are using this function to determine if a Patient Display Board is register or a Quantity board is registered, it is sufficient to touch just one button on the board and, if it is registered, you can assume the entire board is registered. To be absolutely sure the entire board is registered correctly, however, you can touch each button on the board and verify that it is registered correctly based on its position on the board.

This function is also useful if you find a single iButton lying on a desk or on the floor. The iButtons are affixed to the boards or tags in a way that they should not fall off. In some cases, however, a button may become detached and then you might find the button not knowing where it belongs. If you have registered your boards and buttons properly, this function will directly straight to the board or item where the button must be reattached.

- **iButton Reader** – You must first select an **iButton Reader**. The iButton Readers are named using the PAR Agent on which they are defined. There may be multiple Button readers defined in the system but the one you want to select is the PAR Agent that matches the computer name at which you are working. The utility will attempt to identify your computer name and default to that PAR Agent but in some cases you may need to select the computer from the list.

If this is the first time you are using the Button Reader on your computer, contact your System Administrator or call PAR Excellence Technical Support for assistance setting up a PAR Agent on your computer to communicate with the Button Reader.

- **Identify iButton** - Click the **Identify iButton** button on the screen. A message will be displayed prompting you to touch the iButton with the Button Reader. When you touch the button, the utility will display all the information it knows about the button.

If the iButton is not register in the system, it will tell you it is not registered and then you can use the appropriate function to register the button.

Setup and Configuration

Setup and Configuration Overview

These functions let you maintain the information in several supporting tables in the system. One or more of these functions are only relevant if you are using a PAR Excellence feature that uses the data from one of these tables.

Manufactures – This is a list of the manufacturers of the inventory items maintained in the PAR Excellence system. The item manufacturer can be (optionally) selected for an item in the [Item Maintenance](#) function. If you want to track the manufacturer of the item, use this function to add or modify a Manufacturers entry in the system.

Secondary Locations – Use this function to define one or more secondary locations for a PAR Location. This can be used, for example, if you manage the inventory in a location in two small rooms as one PAR Location (for ordering purposes) but you want to keep track of the items in each room.

Employees – If you use the PAR Express system to track or charge items to a patient you can restrict access to that system by using this function to define the hospital personnel who are authorized to use the system.

Physicians – If you track the physicians who perform the cases in your procedure areas, you can define the physicians who work at the hospital using this function.

Procedures – If you track the procedures performed on a patient in your procedure areas, you can define the allowable list of procedures using this function.

Boards & Borrow Cards – This function is used to register the iButtons on the miscellaneous PAR Excellence boards and borrow cards. The boards and cards can be purchased from PAR Excellence but then you must register the board into the system for the specific function for which it will be used.

Manufacturers

Use this function to maintain the list of manufacturers that can be associated to the items in the Item master table.

When this function is selected from the menu a list of all existing manufacturers is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the manufacturer with which you want to work.

Manufacturer Name – You can start typing a manufacturer name and the utility will start filtering the list to show only the manufacturers that match what you have typed so far. When you see the desired manufacturer on the screen, stop typing and click on the name.

Show Deleted – Check this box see the manufacturers that have been flagged as deleted.

The buttons that are available on this screen and the action they perform are:

Add – Create a new manufacturer.

Edit – View or change the information for an existing manufacturer.

Delete – Delete a manufacturer. The data is not actually deleted from the system. The manufacturer is just flagged as deleted so it cannot be selected to be used on an item. You can undelete a manufacturer if it has been deleted in error or was deleted and now needs to be used again.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which manufacturers have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the manufacturer.

Quit – Close the Manufacturers function.

When you click the **Add** or **Edit** buttons the system will display a pop-up screen for the Manufacturer Name. Type the new name (on an Add) or change the name (on an Edit) and click the Save button.

Secondary Locations

This function is used to maintain the Secondary Location names which can be used to organize your secondary iButtons and barcodes.

A secondary iButton or barcode is used when an item is stocked in multiple bins within the primary location. You can optionally associate a secondary button/barcode with a Secondary Location name. This may be useful in cases where a primary location is made up of multiple discrete smaller areas with the same items in bins in each of the small areas. In those cases you may want to provide a Secondary Location name to each of the small areas as a way to organize exactly where the item is located within the primary location.

When this function is selected from the menu a list of all existing secondary locations is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the secondary location with which you want to work.

Facility – Select the facility where the secondary location is located.

Location Name – You can start typing a secondary location name and the utility will start filtering the list to show only the locations that match what you have typed so far. When you see the desired location on the screen, stop typing and click on the name.

The buttons that are available on this screen and the action they perform are:

Add – Create a new secondary location.

Edit – View or change the information for an existing secondary location.

Quit – Close the Secondary Locations function.

When you click the **Add** or **Edit** buttons the system will display a screen where you provide the name for the Secondary Location and optionally identify items that are located in the area.

Secondary Location Item

A secondary location item is an item that already exists as part of a PAR Location but you want to identify a specific area within the PAR Location where some of the inventory is stocked. The secondary item will have a unique iButton value or barcode and can optionally assigned a shelf location. All other attributes for the items are derived from the PAR Location record for the item.

To add an item to a Secondary Location, click the **Add** button under the list of items in the secondary location.

The **Item Search** screen will be displayed where you can search for the item to be added to the secondary location. Once you have selected the item, click the **OK** button on the search screen.

The utility now displays the screen to setup the Secondary Location Item. Complete the fields as described below.

- **Primary Location** – Select the PAR Location where this secondary location is located.

- **Shelf Location** – This is the physical location of the item in the supply location. This field usually contains information such as, Shelf 3 – Bin 5 (abbreviated as S3-B5).
- **Scan Type** – Select from one of the two options provided.
 - iButton – If the quantity-on-hand for this item at this location will be maintained using the PAR Excellence iButton system select this option.
 - Barcode – If the quantity-on-hand for this item at this location will be maintained using either a barcode or using the PAR Bin weight based system with a scale select this option.
- **Tracking Information** – If you have selected Barcode as the Scan Type, you can specify additional information to be captured from the barcode. Typically you would only capture this information for items that have quantity-on-hand being managed with a barcode (not a PAR Bin scale). Talk to your PAR Excellence Account Manager about the PAR Excellence features that let you track UDI information for an item. The Tracking information you can capture includes:
 - Lot Number – Captured only when the item is dispensed to a patient.
 - Lot Number and Serial Number – Captured only when the item is dispensed to a patient.
 - Expiration Date – Can be captured when the inventory is received into the hospital, as well as, when the item is dispensed to a patient.
 - Expiration Date and Lot Number – Can be captured when the inventory is received into the hospital, as well as, when the item is dispensed to a patient.
 - Expiration Date, Lot Number and Serial Number – Expiration Date and Lot Number can be captured when the inventory is received into the hospital and all three are captured when the item is dispensed to a patient.
- **Barcode Value** – PAR Excellence will generate a unique barcode value for each item. This value is internal to PAR Excellence. Utilities are available in the system to link the PAR Excellence barcode to the manufactures barcode if you plan to track quantity-on-hand using the barcode. If the quantity-on-hand is being managed by the PAR Bin weight based system, the internal PAR Excellence barcode is used to set up the PAR Bin scale. For existing items the PAR Excellence barcode value is displayed in this box. For new items being added leave the box empty and the system will generate a value when you click the Save button.
- **iButton Value** – For items that will have the quantity-on-hand managed by the PAR Excellence iButton system you must associate one of the iButtons to the item (so when it is touched with the probe, the system knows which item QOH to decrement). The button value is printed on the button and, if you can read the number, you can enter the value in the box. You can also use the Read Button Value button to capture the value directly from the iButton.
- **Read Button Value** – This button will let you capture the button value off the iButton to be put into the iButton Value field (above). When you click this button the program will ask you to select a button reader. After you select the button reader the program will let you touch an iButton and it will insert the iButton number into the iButton Value field.

In order to use this feature, your computer must be configured with the PAR Excellence button reader hardware. Contact PAR Excellence Technical Support for assistance configuring the hardware.

Employees

The Employees table is used to identify the people who are authorized to use the PAR Express patient charging system. This function lets you Add, Edit and Delete the authorized PAR Express users.

If your PAR Express system is configured for No Logon Required or Universal, you do not have to add employee records for the PAR Express users.

When this function is selected from the menu a list of all existing employees is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the employee with which you want to work.

Employee Name – You can start typing an employee name and the utility will start filtering the list to show only the employees that match what you have typed so far. When you see the desired employee on the screen, stop typing and click on the name.

Show Deleted – Check this box see the employees that have been flagged as deleted.

The buttons that are available on this screen and the action they perform are:

Add – Create a new employee.

Edit – View or change the information for an existing employee.

Delete – Delete an employee. The data is not actually deleted from the system. The employee is just flagged as deleted so it cannot be used to access PAR Express. You can undelete an employee if it has been deleted in error or was deleted and now needs to be reactivated.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which employees have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the employee.

Quit – Close the Employees function.

When you click the **Add** or **Edit** buttons the system will display a screen to enter the Employee information. The information required for an employee varies slightly depending on how you have your PAR Express system configured. When you have completed entering the data, click the **Save** button.

- **Employee Number** – This is the unique identifier for the employee. Normally this would be the number assigned to the employee by the hospital human resources system.
- **Employee Name** – The employee name. There is no formatting enforced on this field but we recommend entering the names as *Lastname, Firstname, MI*.
- **Downloader Pin** – (not used).
- **PAR Express Pin** – If your PAR Express system is configured to logon using a “Code” this is the unique code the employee would use to access PAR Express.
- **PAR Express User ID** – If your PAR Express system is configured to logon using a “Username” and “Password” or Active Directory, this is the employee’s Windows username.
- **PAR Express Password** – If your PAR Express system is configured to logon using a “Username” and “Password”, this is the password the employee will use to access PAR Express.

If your PAR Express system is configured for Active Directory logon, you do not have to enter a password value. The system will use Windows to validate the password.

Physicians

The Physicians table is used to identify the doctors that can be selected for a Case when using the PAR Express patient charging system. This function lets you Add, Edit and Delete the physicians.

If your PAR Express system is not configured to capture Physician, you do not have to put physician records into the system.

When this function is selected from the menu a list of all existing physicians is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the physician with which you want to work.

Physician Name – You can start typing a physician name and the utility will start filtering the list to show only the physicians that match what you have typed so far. When you see the desired physician on the screen, stop typing and click on the name.

Show Deleted – Check this box see the physicians that have been flagged as deleted.

The buttons that are available on this screen and the action they perform are:

Add – Create a new physician.

Edit – View or change the information for an existing physician.

Delete – Delete a physician. The data is not actually deleted from the system. The physician is just flagged as deleted so it cannot be used to access PAR Express. You can undelete a physician if it has been deleted in error or was deleted and now needs to be reactivated.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which physicians have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the physician.

Quit – Close the Physicians function.

When you click the **Add** or **Edit** buttons the system will display a screen to enter the Physician information. When you have completed entering the data, click the **Save** button.

- **Physician Number** – This is the unique identifier for the physician. Normally this would be a number assigned to the physician by the hospital.
- **Physician Name** – The physician name. There is no formatting enforced on this field but we recommend entering the names as *Lastname, Firstname, MI*.
- **Specialty** – This is an optional field where you can enter the doctor's specialty for reporting purposes.

Procedures

The Procedures table is used to identify the surgical procedure that can be selected for a Case when using the PAR Express patient charging system. This function lets you Add, Edit and Delete the procedures.

If your PAR Express system is not configured to capture Procedure, you do not have to put procedure records into the system.

When this function is selected from the menu a list of all existing procedures is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the procedure with which you want to work.

Name – You can start typing a procedure name and the utility will start filtering the list to show only the procedures that match what you have typed so far. When you see the desired procedure on the screen, stop typing and click on the name.

Code – If you know the code for the procedure you can search the procedures using the code.

Show Deleted – Check this box see the procedures that have been flagged as deleted.

The buttons that are available on this screen and the action they perform are:

Add – Create a new procedure.

Edit – View or change the information for an existing procedure.

Delete – Delete a procedure. The data is not actually deleted from the system. The procedure is just flagged as deleted so it cannot be used to access PAR Express. You can undelete a procedure if it has been deleted in error or was deleted and now needs to be reactivated.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which procedures have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the procedure.

Quit – Close the Procedures function.

When you click the **Add** or **Edit** buttons the system will display a screen to enter the Procedure information. When you have completed entering the data, click the **Save** button.

- **Name** – The procedure name. There is no formatting enforced on this field.
- **Code** – This is an optional field where you can enter a short code for the procedure name used primarily for searching for the procedures.

Boards & Borrow Cards

This function is used to register the iButtons on the miscellaneous PAR Excellence boards and borrow cards. The boards and cards can be purchased from PAR Excellence but then you must register the board into the system for the specific function for which it will be used.

In order to use this function, your computer must be configured with the PAR Excellence button reader hardware. Contact PAR Excellence Technical Support for assistance configuring the hardware.

When this function is selected from the menu a list of all existing boards and cards is displayed. You can use the search fields at the top to narrow down the list or just scroll down until you see the board with which you want to work.

Facility Name – Select the facility where the board is registered.

Location Name – Select the PAR Location for which the board is registered.

Board Type – Select the type of board.

Board Name – If you have named the boards and cards in your system you can enter all or part of a name to narrow the list to boards matching what you typed.

The buttons that are available on this screen and the action they perform are:

Add – Register a new board for the first time.

Edit – Re-register a board. This would only be necessary if, for example, a button fell off the board and you replaced it with a new button.

Delete – Delete a board from the system.

Quit – Close the Boards & Borrow Cards function.

When you click the **Add** a pop-up screen will ask you to select the type of board to be registered. Select the board type from the list.

The next screen will be an image of the actual board that you want to register. If the picture doesn't look like the board you have in front of you then you have selected the wrong type of board from the list.

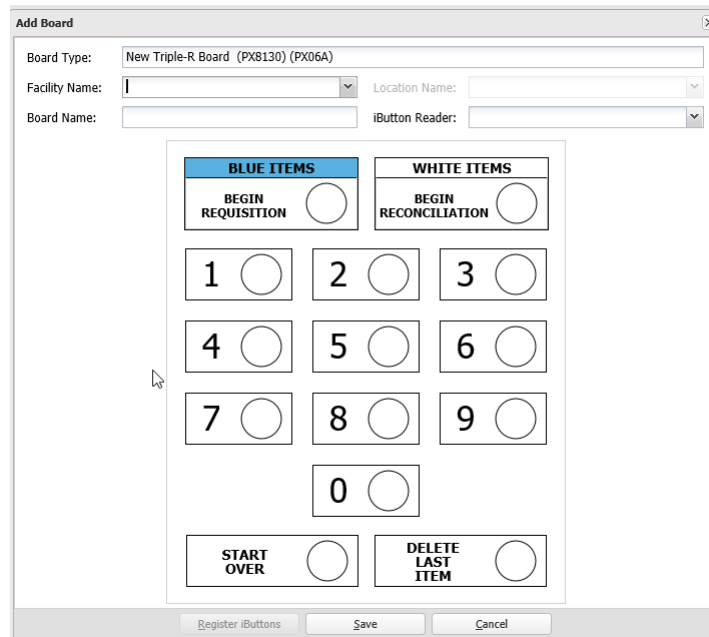
Complete the information at the top of the screen.

Facility Name – Select the facility where the board will be used.

Location Name – Select the PAR Location where the board will be used. If this is a board that will be used at multiple locations, you can leave this field blank.

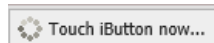
Board Name – Optionally, you can enter a name for the board. This can be useful when trying to identify the board if you ever need to re-register the board.

iButton Reader – Select the iButton reader that will be used to register the board. The system will pre-select the most likely iButton reader based on the workstation where the work is being done.



After you have completed the fields at the top of the screen, click the **Register iButtons** button.

The first iButton picture on the screen will start flashing with a message in the middle of the screen prompting you to touch an iButton. Touch the corresponding iButton with the button reader on the actual board you have sitting in front to you.



After the button touch is recorded, the next iButton picture on the screen will begin flashing and the message will be redisplayed. Touch that iButton with the button reader. The process will continue until all iButtons have been touched. Click the **Save** button on the screen to save the board registration.

The process to re-register a board using the **Edit** function is the same with the exception that you will get a warning that the buttons have already been registered and you will have to acknowledge that you want to re-register the board.

Go To and About

Go To and About Overview

These two menus let you navigate to other PAR Excellence applications and functions and give you information about the software version.

PAR Admin

This selection will take you to the PAR Admin application which is used by the administrators of the PAR Excellence system to set system options and maintain the system security.

PAR Vision

Use this selection to load the PAR Vision Reporting and Analysis application. The PAR Vision system provides numerous reports you can use to monitor the day-to-day activity in the system as well as analyze historical data captured over the previous six to twelve months.

Logout

This menu selection will log out of PAR Client and display a User Name and Password Login dialog. This can be useful if you are at the desk of a co-worker and you want to run a PAR Client function which only you are authorized to run. You can Logout PAR Client and login using your own Windows credentials and you will have full access to all you functions.

About

Open this menu to see the PAR Client version running at your hospital.

System Setup (PAR Admin)

System Setup Overview

The functions in this menu are only available in the PAR Admin application. These menu selections are used to setup the system for use by PAR Client.

Global Options – These system settings control how various PAR Excellence functions and applications behave. Normally you will not change one of these settings without first consulting with the PAR Excellence Technical Support team.

Facilities – Use this function to add, edit or delete facilities in the organization.

Item Labels – This function is used to define the Item Label layouts. Once a label layout is defined it can be selected for use in the [Print Item Labels](#) function in PAR Client.

Agents – The Agents are the background processes that runs jobs submitted from PAR Client (such as; Order jobs, Label Print jobs, etc.). This function is used to define and configure the Agent processes.

Applications – An application is an installation file that can be downloaded and installed on a workstation to support the PAR Client application. This function is also used to upload custom jobs on the server that are not part of the standard PAR Excellence system and have been developed specifically for your organization.

Global Options

The Global Options screen has three tabs containing option setting for different parts of the system.

General Options

These setting affect various parts of the system but no one specific group of functions.

- **Provider Name** – The name you use to identify your organization. This name appears at the top left side of the PAR Client screen and on some of the printed reports (such as, pick tickets for orders).
- **Acronym** – A code that has been assigned to your installation by the PAR Excellence Technical Product Support team. This code it used to identify your organization to the Proactive technical product Support System (PTPS). *Do not change this field unless instructed to do so by PAR Excellence Technical Support.*
- **PAR Vision URL** – The link used to connect to the PAR Vision application from the PAR Client **Go To...** menu. You can copy this link and create a desktop icon to PAR Vision if you want.
- **MM Hospital Name** – This name can be passed to the hospital Materials system as part of the interface messages sent from PAR Excellence if the system requires a hospital name as part of the transaction.
- **Use Barcodes** – This switch indicates that your organization uses PAR excellence barcodes on the labels of some, or all, of the items. If you do not use PAR Excellence barcodes you can uncheck this box to change the default settings in a few functions.

- **Enable Lot Tracking** – Check this box if you are tracking both the Lot number AND Expiration date as items are received into the hospital, as well as, when they are dispensed out. When this box is not checked you can track Expiration date on receipt but Lot numbers are only tracked when they are dispensed (for eligible items).
- **Use Bed Log** – When this box is checked, the system will log transactions that can be used to determine why a patient was put into or taken out of a bed. We recommend that you check this box if it is not already checked because it can be very useful.
- **Bed Accounting Group** – If you are using accounting group codes to group together transactions from related beds, this field is used to specify which patient user field should be used to hold the account group name for the transactions applied to a patient.
- **Patient Charging Days** – The number of after an item has been dispensed to a patient that the system will still send a charge transaction to the billing system. If everything is running properly, the patient charges will all be sent immediately (real-time charges) or at the end of each day (batch charges). This setting only takes effect when charges are re-sent or if a pending charge or suspended batch is assigned to a patient several days after the item was dispensed.
- **Issue Adjustments** – If your organization is using an interface to send a dispense transaction to the Materials system every time an item is dispensed, this box can be used to tell the system that adjustment transactions (resulting from a reconciliation) should also be sent to the Materials system.
- **Reconciliation Timeout Minutes** – This represents the number of minutes that should pass after a reconciliation batch has been downloaded before the system assumes the item counts are complete. This setting only affects items that have a primary storage location and a secondary storage location (so the items in more than one bin might need to be counted to come up with the total QOH for the item).
- **Update Suspended Batch QOH** – This option is included for backward compatibility with a previous version of the system. In most cases this box should be checked so the system properly decrements the QOH for an item when it is dispensed even if the batch is subsequently suspended). This setting only affects white label items.

Security Options

These options affect the security features in certain PAR Excellence applications outside of the main PAR Client Security which is handled separately.

- **Auto Logoff Minutes** – You can specify the number of minutes of no activity before the system will automatically logoff the user. Use this to insure that sensitive patient information is not left displayed on an unattended screen.
- **Employee Security** – If you use the PAR Express patient charging application this selection the type of login that is required to access PAR Express. This setting affects the data that will be required when a new user is added using the [Employees](#) screen,
- **Employee Exp Days** – If you are using “User Id/Password” security for PAR Express, you can specify the number of days before a user’s password expires. Leave blank for no expiration.

If you use the PAR Express feature “via Active Directory” in the setup screen, the two settings above have no effect. Password expiration and case sensitivity are managed by Active Directory.

- **Password Case Sensitive** – This option is included for backward compatibility and is not used in this version of PAR Client.

Ordering Options

These options affect the way the PAR excellence orders are built and managed.

- **No Backorders** – Check this box to disable backorders in the system. If backorders are disabled all order are treated as fill/kill meaning that an order not received in full is still closed and no additional shipments are expected for the remaining quantity ordered.
- **Negative QOH** – Check this box if you will allow the quantity on hand for an item to be a negative number. This setting only affects items being managed by the PAR Excellence iButton system. An item on a PAR Excellence scale will never have a negative quantity since when the bin is empty, the quantity on hand is zero and there are no more items to be taken.
- **QOO Plus QOH** – Check this box if the quantity on order should be combined with the quantity on hand when determining if an item is below the re-order point. If the box is not checked, unreceived orders will not affect reordering (only the quantity on hand).
- **Order Box %** - This percentage is used to calculate the re-order point when the PAR Level for an item is exactly the same as one replenishment unit. Normally PAR Excellence will not reorder an item until at least one replenishment unit is required but when the entire PAR level is only one replenishment unit the bin would be empty before the item was reordered. This lets you reorder before the bin is empty.
- **Order Edit Grace Period** – The number of days after the order is closed that you can still make changed to the quantity received. Once this number of days has passed, the order can no longer be changed.
- **Order Min Rounding** – When the reorder point is affected by a minimum order quantity you can decide to round up or down if the result is a fraction.
- **Order Mult Rounding** – When the reorder point is affected by an order in multiples quantity you can decide to round up or down if the result is a fraction.
- **Requisition Qty** – This setting affects how the system treats a requisition quantity for items being managed by the PAR Excellence iButton system.
 - Order Qty –The quantity requisitioned represents the number of items you want to order represented in the replenishment unit of measure.
 - Stock Qty in Issue Units –The quantity requisitioned represents what is currently in the bin represented in the issue unit of measure. This value will be compared to PAR level to determine what should be ordered.
 - Stock Qty in Replenish Units –The quantity requisitioned represents what is currently in the bin represented in the replenishment unit of measure. This value will be compared to PAR level to determine what should be ordered.
- **Order Blue Neg Qty** – Check this box if you want the system to honor a requisition value higher than the PAR level for the item. If the box is unchecked, the system will never order more than the PAR level regardless what is requisitioned.
- **Blue Receive No Add** – Check this box if you plan to requisition new stock after the previous requisition has been put away but you have not yet received the order in the PAR Excellence system. When this option is checked, basically, the system will order exactly what has been requisitioned even if it thinks stock has been replenished since the time the requisition was done.
- **Neg QOH Adj Tran** – Check this box if you want the system to create adjustment transactions that show when the QOH for an iButton item is adjusted from negative to zero prior to ordering the item. This is only applicable if you also check the **Negative QOH** box (described above).

Facilities

This function lets you add, change and delete the Facility entries for your organization. You will use this when you start using PAR Excellence at another hospital within your IDN or if the name of a hospital changes and you want the Facility name to reflect the change.

When this function is selected from the menu a list of all existing facilities is displayed.

The buttons that are available on this screen and the action they perform are:

Add – Create a new facility.

Edit – View or change the information for an existing facility.

Delete – Delete a facility. The data for the facility is not actually deleted from the system. The facility is just flagged as deleted so it cannot be selected from any facility list. *Be very careful, however, because all locations and location items assigned to the facility will be permanently deleted.* You can easily recall the facility but that does not recall all the locations and location items.

Undelete – If you check the box in the search area to Show Deleted, a column will be added to the screen to indicate which facilities have been deleted. If you highlight one of the flagged lines, this button will appear (in place of the Delete button). Click the Undelete button to reactivate the facility.

Quit – Close the Facilities function.

Add or Edit a Facility

When you click the **Add** or **Edit** buttons the system will display the Facilities maintenance screen. If you are adding a new facility you must enter a Name for the facility. If you are editing an existing facility, you can change the Name.

This screen contains two (2) tabs of data that is used to define a facility.

User Access – This tab has a list of all users in the system and you can allow or disallow each user access to this Facility. You can also give a user access to a Facility on the User Administration screen.

Interfaces – On this tab you can set values for a few fields that are used by certain interfaces. If you are not familiar with how the PAR Excellence interfaces work, do not make any changes on this screen without consulting with the PAR Excellence interface department.

Item Labels

This function is where you define the label layouts to appear in the Label Name dropdown list on the [Print Item Labels](#) screen. You can define as many layouts as you need. You can define layouts that can be used by all facilities or layouts that are specific to a single facility.

The buttons available on the Item Labels screen are:

- **Add** – Create a new label layout.
- **Edit** – Change an existing label layout.
- **Copy** – Create a new layout using an existing layout as the basis. This can save you time if a new layout is needed that is very similar to one of the existing layouts. You can also use this to “save” a label layout before you start making changes to it so you can easily revert back if you don’t like how the new label looks.
- **Delete** – Remove a label layout that is no longer needed.

Building a Label Layout

When you click Add or Edit, the screen to build the label layout is displayed. Start by completing or changing the fields at the top of the screen.

Label Name – This is the name that the user will select on the Print Item Labels screen. Make the name descriptive enough so the user knows which name to select. For example, *QR Code Chargeable* or *Barcode Cath Lab* or *QR Continuous Feed*, etc.

For use at Facility – If the layout can be used by all facilities select (All). If this layout is specific to the needs of just one facility select the facility.

Label Size/Type – Select the type of paper on which these labels will be printed.

- 1" x 3" Inserts - 24 per Sheet – This is the standard PAR Excellence label. The labels come on perforated card stock and fit into a sleeve (the sleeve is also available from PAR Excellence) to make them durable and water proof. The sleeve has an adhesive on the back so it will stick to the bin.
- 1" x 3" Self-Adhesive - 24 per Sheet – These labels are the exact same size as the 1" x 3" inserts but the labels are self-adhesive so they can stick straight onto the bin (no sleeve is necessary). These labels will not be as durable as the inserts (because they are not in a sleeve) and they are more difficult to change (an insert can be changed by sliding the old label out of the sleeve while sliding the new label into the sleeve without removing the sleeve from the bin).
- 1" x 3" Self-Adhesive - Continuous Feed – These are self-adhesive labels that come in a roll and are printed one at a time while continuously feeding the roll. To print these labels you will need a special printer that is manufactured specifically to print labels and only labels. PAR Excellence Technical support can give you more information about the printer models that are supported.
- 11/16" x 3" Inserts - 33 per Sheet – This is slightly shorter label that also come on perforated card stock and fits into a plastic sleeve.

Default Font Size – Select the default font size for the information printed on the label. You can override this value for any of the fields you put on the label but to save you time building the label select the size that will be used for most of the data.

Fields – This is where you define the exact content of the label.

- Use the **Add** button to select a field of data to be printed on the label.
- As you put fields on the label they will appear in the Fields dropdown list where you can select a field to adjust its position.
- To remove a field from the label, select the field from the dropdown list and click **Delete**.

The field you are currently working with will be red in the layout area as a visual aid. All data is printed in black font when you print the labels.

- Start by changing the **Font Size** if you want the data to be bigger or smaller than the default size. The font size will affect where you position the data in the layout so it is best to do this first. If you want to use the default font size for this field leave the Font Size blank.
- Now adjust the **Top** and **Left** values to move the data to the appropriate spot on the label. You can use the up/down arrows at the right side of these boxes to "slide" the data into the proper position.

When the data is positioned where you want it, click the **Add** button to select another new field to be put on the label or select a field from the Fields dropdown to work with a field previously added to the label.

If you want to put "hard coded text" on the label (to describe one of the fields), select **Text** from the Add Field dropdown. A **Text Value** field will appear in the Fields area of the screen to type the hard-coded value.

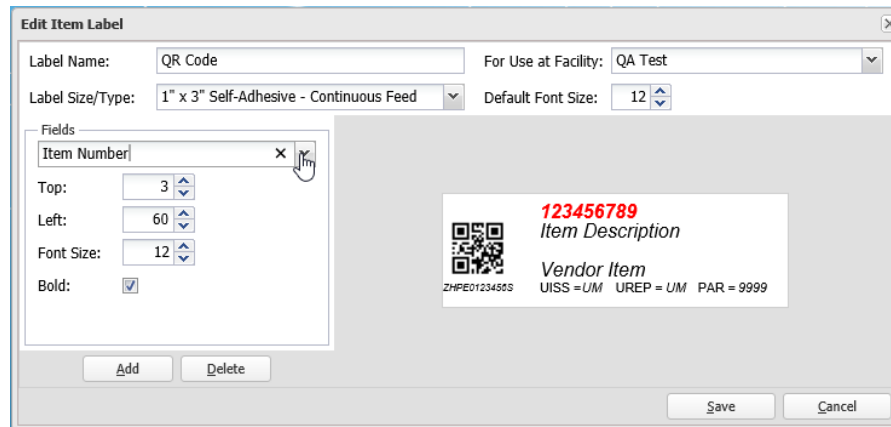
The full list of fields that can be put on the label are described in the next section of this manual.

Here are some recommendations and hints to save you time building your label layouts.

- Put the machine readable information (**Barcode** or **QR Code**) on the label first and position it where you want it printed so you can make sure nothing will over-print onto it.

- It is recommended that the machine readable information is positioned on the left side of the label to insure long text does not over-print onto it which will make it unreadable by the scanner.
- Start the machine readable data in Left position 5 or higher to insure there is enough “white area” around it to satisfy the scanner.
- If you are printing an iButton label use a QR Code (size large) as a place-holder while you build the label to make sure you don’t have something printing under the iButton when the label is put in the sleeve. Remember to delete the QR Code when you are finished.
- If you select Item Description to print on the label, the actual data that will be printed is the Bin Label. This is a “manipulated” version of the Item Description so you can fit more information on the label. In the Bin Label you can insert a new line character “\n” to print the description on two lines. If your Bin Label values are manipulated with a new line character, be sure to leave a blank line under the Item Description on the label.
- The actual data printed on the label may be longer or shorter than the place-holder put on the label layout. Keep this in mind as you build the layout and be sure to leave enough room to the right of each field to avoid overprinting of information.
- If you have multiple hard-coded text values on the label they will all appear in the Fields dropdown as **Text**. To select a specific text field to work with pick the entry in the list based on the position of the text on the label top-to-bottom-left-to-right relative to the other Text fields.

The picture below shows a typical label layout generated with the Item Labels function. In this picture the Item number field is selected to be modified on the label.



Label Fields

Following is the full list of fields that can be printed on the label.

- **Bar Code** – The machine readable linear (1-dimensional) barcode.
- **Critical Level** – The critical level for the location item.
- **Expense Center** – The Expense Center for the location item.
- **Expense Code** – The Expense Code for the location item.
- **Expiration Date Required** – This is a notation on the label that the user will have to scan an expiration date when this item is dispensed. It will only be printed for items that require an expiration date. If it is used, it is usually printed in very small font near the corner of the label. It is intended to be a prompt to the user so they are prepared to scan this extra information.

- **Installer Data** – This is a string of characters that can be useful when doing the setup of the room. If it is used, it is usually printed in very small font near the corner of the label. When the label is printed the person printing the label can elect to leave this off the label if he/she feels it is not needed.
- **Item Cost** – The purchase cost of the item. The output for this field does not include a \$ but you can include it if you want as a hard-coded text field. It is not recommended to put this data on the label since it may change and require the label(s) to be reprinted.
- **Item Description** – This is the description of the item. It is normally printed on every label. The data printed for this spot is actually the Bin Label data which is the Item Description “manipulated” to maximize the amount of data that can fit on the label.
- **Item Number** – The unique number assigned to the item. This field is normally printed on all labels.
- **Item Shelf Location at PAR Location** – The Shelf Location for the location item. This is the shelf and bin where the item is physically located in the supply location.
- **Location Name** – The name of the supply location. This is typically not used since it will be the same on every label in the room.
- **Location Name - MM Interface** – The MM interface name for the supply location. This is typically not used since it will be the same on every label in the room.
- **Manufacturer Name** – The name of the manufacturer for this item.
- **PAR level - Issue Units** – The PAR level for the item using the Issue Unit of Measure.
- **PAR level - Replenishment Units** – The PAR level for the item using the Replenishment Unit of Measure.
- **Patient Charge Code** – The charge code for the item. Only printed if the item is chargeable.
- **Patient Cost** – The price charged to the patient for the item. The output for this field does not include a \$ but you can include it if you want as a hard-coded text field. It is not recommended to put this data on the label since it may change and require the label(s) to be reprinted.
- **QR Code** – The machine readable matrix (2-dimensional) barcode.
- **Reorder Point** – The reorder point for the item.
- **Replenishment Source** – The source which will replenish the item.
- **Replenishment/Issue Factor** – The factor between the replenishment unit and the issue unit. For example, if the item is issued by each and replenished by the box and there are 10 in a box, the factor is 10.
- **Requisition Quantity** – For items that are replenished by manually counting the item, This is the quantity that will be ordered if no quantity is specified when it is counted.
- **Revenue Center** – The Revenue Center for the location item.
- **Revenue Code** – The Revenue Code for the location item.
- **Scan Value** – The human readable value of the barcode or QR code. This is the internal identifier used in the PAR Excellence system when the code is scanned. It is not uncommon for the scan value to be printed in small text directly beneath the machine readable code. It can be used sometimes if the machine readable code cannot be scanned. In PAR Excellence, however, you will normally select the item using the Item Number of the code cannot be scanned.
- **Text** – Used to include hard-coded text on the label. You can include multiple Text values on any label (put a Text value anywhere you need hard-coded text on the label).
- **Unit of Issue** – The unit of measure that is issued to the patient. This is normally the low unit of measure.

- **Unit of Replenishment** – The unit of measure used to restock the item from the replenishment source.
- **User Field 1 to User Field 4** – These are the generic user fields that appear on the Comments tab on both the [Items](#) screen and the [Location Items](#) screen. These fields are used for “hospital specific information” that is not otherwise needed or used by PAR Excellence. When you select one of these fields to be printed on the label, the Print Labels program will first look for information in the user field for this item at the specific location. If that field is blank it will look at the user field in the Item Master.
- **Vendor Item Number** – The number assigned to this item by the vendor or manufacturer. This number is normally printed on the item packaging.

Agents

The PAR Excellence Agents are the programs that process the batch jobs on the server and interact with the PAR Excellence hardware devices on a workstation.

The Agents on the server are installed at the time the PAR Excellence application is installed. If you have a iButton Reader, touchprobe downloader or Zebra printer attached to your workstation, you will also have an Agent installed locally on your computer.

For more information about installing a PAR Excellence Agent on a workstation, refer to the next section of this document describing [Applications](#).

All the Agents currently defined in the system are displayed on the screen along with the computer on which each is installed, the version and the current status.

You will notice that there are one or more **PAR Agent** entries and one **PAR Monitor**. The PAR Monitor is a system job that monitors all the other Agent processes. You should never need to install another PAR Monitor job.

The buttons on the screen and the action each performs are:

- **Refresh** – Updates the content of the current screen (this is used primarily to see if the Status column is changing).
- **Pause** – Stop the selected Agent so it quits looking for jobs to be processed. This can be done to insure no jobs are processed while you are working on the system. This is also how you refresh the Agent if you have made changes to the Agent configuration.
- **Start** – This button replaces the Pause button after you have paused an Agent. Click this button to restart the Agent when you are ready for it to run again. If you are simply refreshing the Agent because you have made changes to the configuration, you can restart it immediately.
- **Ping** – Send a command to the selected Agent to make sure it is running properly and will respond to a command.
- **Edit** – View or change the configuration of the selected Agent.
- **Delete** – Remove an Agent from the system.
- **Quit** – Exit the Agents function.

Edit PAR Agent

At the top of the Edit Agent screen there are a few fields that control the Agent that runs the batch job on the server. These fields have no meaning for any Agent that is running on a workstation simply to interact with a hardware device.

- **Home Directory** – This is the path to the PAR Excellence folder. The Agent uses this to locate the interface input/output files and the folder to send alerts to PAR Excellence.

- **Polling Interval** – This determines how often the Agent “wakes up” and looks for something to do. The default is 1 minute which is usually a good interval.
- **Listener Port:** - The TCP/IP port the Agent uses to receive commands from other programs (for example, the Pause and Ping buttons described above send a command to this port). The default is 37000 which we selected because our research indicated that no other programs or system functions were using that port.

The rest of the Agent screen is used to define which jobs/devices the Agent will manage. Click on a tab and make selections (as described below) if you want this Agent to run these jobs (or manage these devices).

- **Order Batch** – The settings on this tab will determine if the Agent will run order jobs defined with the [Batch Jobs](#) function in PAR Client. Select the setting for *Process Facility* as described below.
 - Any – The Agent will run the order batch jobs for any facility (this is the most common setting for the Agent running on the application server).
 - Selected – The Agent will run order batch jobs only for the facilities selected in the panel on the right. If you use this, and you do not select all facilities, be sure the unselected facilities will not be running order batch jobs.
 - None – This Agent will not run order batch jobs. This setting is used for an Agent that will only interact with a hardware device.
- **Order Extract/Receipt** – These settings determine if the Agent will run order extract and receipt jobs. Select the setting for *Process Source* as described below.
 - Any – The Agent will run the order extract jobs for any facility (this is the most common setting for the Agent running on the application server).
 - Selected – The Agent will run order extract jobs only for the replenishment sources selected in the panel on the right. If you use this, and you do not select all sources, be sure the unselected sources do not have orders to be extracted (this includes both batch orders and those built interactively with PAR Client).
 - None – This Agent will not run order extract/receipt jobs. This setting is used for an Agent that will only interact with a hardware device.
- **Charge Batches** – These settings determine if the Agent will run patient charge batch jobs. It is not unusual for the *Process Facility* setting on this tab to be None for hospitals that do not do patient charging through PAR Excellence or hospitals that do real-time charges. Select the setting for *Process Facility* as described below.
 - Any – The Agent will run the charge batch jobs for any facility.
 - Selected – The Agent will run charge batch jobs only for the facilities selected in the panel on the right.
 - None – This Agent will not run charge batch jobs. This setting is used for an Agent that will only interact with a hardware device or at any hospital that does not generate patient charge batches.
- **Issue Batch** – These settings determine if the Agent will run issues batch jobs. It is not unusual for the *Process Facility* setting on this tab to be None for hospitals that do not do issues batches. Select the setting for *Process Facility* as described below.
 - Any – The Agent will run the issues batch jobs for any facility.
 - Selected – The Agent will run issues batch jobs only for the facilities selected in the panel on the right.
 - None – This Agent will not run issues batch jobs. This setting is used for an Agent that will only interact with a hardware device or at any hospital that does not generate issues batches.

- **Custom Jobs** – A custom job is a function built specifically for your hospital by PAR Excellence. These jobs can perform almost any function depending on what was requested by the hospital. If your hospital has a custom job it will be run by the Agent based on a schedule you define in [Batch Jobs](#). Select the setting for *Process Jobs* as described below.
 - Any – The Agent will run any custom job.
 - Selected – The Agent will run the custom jobs selected in the panel below.
 - None – The Agent will not run custom jobs or there are no custom jobs to be run.
- **Process HL7** – At some hospitals, the Agent on the server will also be used to process HL7 messages. If you want the Agent on the server to process HL7 messages, check the box for **Process HL7 Messages** then complete the remaining fields as described below.
 - Inbound Directory – This is the full path name to where the HL7 files are being delivered by the HL7 Server process.
 - File Pattern – A file pattern for the files to be processed. For example *.HL7.
- **Interact with Devices** – Certain functions in the PAR Excellence application must interact with a hardware device. Since the browser (which displays the PAR Client screens) cannot interact with a hardware device, you must install an Agent to perform those tasks. These Agents are generally installed on the workstation computer where the device is attached and they are setup exclusively to run the device. Devices supported by the Agent include:
 - iButton Reader – This device is used to register iButtons to the system. Two types of button readers are supported, a USB button reader and a serial button reader.
 - If you have a serial button reader you will have to specify the COM port where the device is installed.
 - If you have a USB button reader (and only one button reader attached to the computer, which is recommended), you can specify port zero.
 - If you have just one USB button reader attached, you can use Default and you do not have to specify a port.
 - Downloader – This is used if you want to download a touchprobe at the PAR Client workstation. If you check the Downloader box you will then be allowed to select a port number. In almost all cases you will want to use Port 0. Contact PAR Excellence Technical Support if you think you need to use a different port.
 - Zebra Printer – Used for printing continuous feed labels. If you have a Zebra printer attached to a workstation and you want to use it to print PAR Excellence labels, click the Add button to define the printer to the Agent.
 - Name – This is the name of the printer the user will choose when printing labels. It should be something meaningful to the users, such as, Zebra on Main MM Client.
 - Facility – The name of the facility where the printer is located. You must pick a facility but the same printer can be defined for two facilities.
 - Printer Name – This is the Windows name for the printer. It must exactly match the printer name in the Windows Settings.

Applications

This function is used to download and install several packages that support the PAR Client system. The function also includes an upload section for Custom Assemblies but that functionality will only be used by PAR Excellence Technical Support during the installation of the system.

The applications that you, as a PAR Client user, may need to download and install are listed below.

- **PAR Excellence Agent Service** – This service will be required if you plan to connect certain hardware to your PAR Client workstation. This would include –
 - Button reader – to assign or identify iButtons for items.
 - Downloader – to download iButton touches from a touch probe.
 - Zebra printer – to print labels on continuous feed labels.
- **PAR Excellence Monitor Service** – This service is never required on a PAR Client workstation.
- **1-Wire Network Driver v4.03** – This driver package is required if you are connecting a USB button reader to your workstation. Download the appropriate version depending on your Windows Operating System (32-bit or 64-bit).
- **Barcode Reader** – Install this application if you are connecting a tethered scanner to your workstation to scan expiration date and lot number barcodes during the receiving process.
- **Motorola Barcode Scanner Driver v2.07.001** – This driver package is required if you are using the Barcode reader (described above). Download the appropriate version depending on your Windows Operating System (32-bit or 64-bit).

In order to install any of these packages you will need Administrator privileges on the computer. If you do not have Administrator privileges you should contact your IT department for assistance installing the package.

PAR Excellence Agent Service

This service will be required if you plan to connect certain hardware to your PAR Client workstation. Once the Agent is installed, it can be configured to manage the appropriate device(s). More information on configuring the Agent to manage the devices can be found in the [Edit PAR Agent](#) section of this document.

To download and install the PAR Agent Service, follow the instructions below.

1. Click the **Download** button to the right of PAR Excellence Agent Service.
2. When prompted by the browser, select **Open**.
3. Click **Extract** all files.
4. You can extract the files to any folder on your system but we highly recommend you extract them to a new folder with an appropriate name (such as, **ParExAgent**).
5. After the files are extracted proceed to the next step.
6. Click the Windows Start button (or Cortana button if this is Windows 10).
7. In the search box type **cmd**.
8. When you see the Command prompt (or cmd.exe) in the results list, right-click on it and select **Run as Administrator**.
9. In the Command Prompt window navigate to the folder where the files were extracted using the CD (change directory) command.
10. Once you are in the correct folder type **parex.agent –install** and press the [Enter] key.
11. The system will display some messages as it install the Agent with the last message indicating that the “**install has completed**”.

You can now go to the Agents function and configure the new Agent (which will be listed with your computer name as the **Host Name**) to manage the appropriate hardware devices.

1-Wire Network Driver

This driver package is required if you are installing a UBS button reader on your workstation.

To download and install the driver, follow the instructions below.

1. Click the **Download** button to the right of 1-Wire Network Driver.
2. When prompted by the browser, select **Open**.
3. Double-click on the file **install_1_wire_drivers** (the last part of the file name will differ depending on if it is a 32-bit or 64-bit driver).
4. Follow the instructions on the screen to complete the installation of the driver package.

Barcode Reader

This application is required if you are installing a tethered scanner on your workstation to scan expiration date barcodes during the receiving process.

To install the application, follow the instructions below.

1. Click the **Install** button to the right of Barcode Reader.
2. The barcode reader application should install automatically.
3. When it is finished you should see a small scanner icon in your system tray (down by the date and time).

Motorola Barcode Scanner Driver

This driver package is required if you are installing a barcode reader (see above) on your workstation.

To download and install the driver, follow the instructions below.

1. Click the **Download** button to the right of 1-Wire Network Driver.
2. When prompted by the browser, select **Open**.
3. Click **Extract** all files.
4. Let the program extract the files to the default location that it has selected but be sure you check the box that says **Show extracted files when complete**.
5. When the extract is finished it will display the extracted files.
6. Double-click to open the Motorola_CoreScanner_Driver folder.
7. Now double-click on the Motorola_CoreScanner_Driver program.
8. Follow the instructions on the screen to complete the installation of the driver package.

Data Import (PAR Admin)

Data Import Overview

The functions in this section of the PAR Admin application can be used to do mass imports of items to the PAR Excellence system. This is used primarily when you begin setting up a new PAR Location in the system.

If you can extract data from your Hospital Materials Management system into a CSV or Excel file then you can copy those entries into the PAR Excellence Import Template and add data for a few additional “PAR Excellence specific columns” and load all the data for the location in a fraction of the time it would take to manually enter each item into the system.

Download Template – Use this function to download the Excel template that must be used to import data to PAR Excellence.

Import Data – This function is used to import the data in the Excel file (built using template downloaded above) into the PAR Excellence system.

Download Template

In order to do a mass import of data into the PAR Excellence system, the data must be inserted into a specific Excel format that is recognized by the PAR Excellence Import Data function.

Use this function to download an Excel file that contains all the necessary components that you will use as a template to build the Excel file that will be used for the import. Once the template file is downloaded, you can copy and paste data columns from another spreadsheet into the template.

On the **Download Data Import Template** screen, select **Location Item** and click the **OK** button.

The browser will prompt you to **Open** the file. Once the template is open and you enable editing (if required) you can start building the spreadsheet of items to be imported into PAR Excellence. Once the data has been placed into the template, use the **Save As** function in Excel to save the file on your computer to be used with the [Import Data](#) function.

The following information will help you complete the columns in the template.

Control Row

Row 1 of the template contains three fields that affect how the system imports the data. Do not change these rows except as instructed below.

Facility – In the empty column (B1) after the Facility heading (shaded in pink) select the Facility for which the new data is being imported.

New Item Scan Type – In the empty (pink) column following this heading (E1) select whether you will be using barcodes or iButtons for the items being imported. If the items will be managed by PAR Bin scales, select barcode.

New Item QOH – For this heading, in the empty (pink) column (H1) how you want the import program to set the initial QOH values. For items being managed by PAR Bin scales, this value does not matter since the scales will calculate the QOH once they are activated. For items being managed by iButtons this will depend on whether you plan to build a PAR Excellence Order to initially stock the room or if you will manually just stock each bin at full PAR Level.

Data Column Headers

The second header row contains the description of the data to be put in each column. If you have a spreadsheet of data that was built by exporting data from your Materials System, you can copy full columns of data from your existing spreadsheet into the template spreadsheet starting in Row 3 of the template.

There are a few columns that contain “PAR Excellence specific data” and those you will have to complete manually. In many cases, however, the data is the same for every item being imported.

PAR Location – *(required)* The name of the PAR location for which the items are being imported. If all the items in the spreadsheet are for a single location, this value will be the same for all rows. If you are importing additional items into an existing location make sure the name exactly matches the name which is already in the PAR Excellence system.

Item Number – *(required)* The item number from the Materials Management system. This column will normally be copied from a spreadsheet exported from the MM system.

Item Description – *(required)* The item description from the Materials Management system. This column will normally be copied from a spreadsheet exported from the MM system.

Vendor/Mfg Number – *(optional)* The vendor (or manufacturers) number item description from the Materials Management system. This column will normally be copied from a spreadsheet exported from the MM system.

Item Type – *(required)* This column contains PAR Excellence specific information and it indicates how the item will be managed in the PAR Excellence system. The valid values are:

- **S** – A scale item that will be managed by a PAR Bin scale.
- **W** – A white item that will be managed with an iButton that will be touched each time the item is dispensed. These items can also use barcodes using the PAR Excellence scanner solution.
- **B** – A blue item that will be managed with an iButton that will be touched only to requisition the item. These items can also use barcodes using the PAR Excellence scanner solution.

Issue Unit – *(required)* The unit of measurement that will be issued to the patient. This is how the quantity on hand will be maintained in the system. This column will normally be copied from a spreadsheet exported from the MM system.

Replenishment Unit – *(required)* The unit of measurement that will be replenished to the bin. This is how the item will be ordered from the storeroom or the vendor. This column will normally be copied from a spreadsheet exported from the MM system.

Repl/Issue Factor – *(required)* The relationship between the Issue Unit and Replenishment Unit. If the two units are the same, this will be 1 (indicating a 1-to-1 relationship). If the replenishment unit is different, this will be the number of issue units contained in the replenishment unit (for example; 12 if the replenishment unit is a box of 12).

Unit Issue Cost – *(optional)* The item cost represented by the issue unit. This column will normally be copied from a spreadsheet exported from the MM system. There are several PAR Excellence

reports that use cost as analysis data so, if this data is available, we recommend that you import the data.

Replenishment Source – *(required)* This is the source that replenishes this item to the specified PAR Location. For internally sourced items this will typically be the hospital storeroom. For externally source items it could be the vendor who supplies the item. This is information that can probably be copied from a spreadsheet exported from the MM system. If some, or all, of the sources already exist in PAR Excellence, make sure the names entered in the spreadsheet exactly match the names which are already in the PAR Excellence system.

Replenishment Bin – *(optional)* The bin location in the storeroom where the item is located. This can be printed on a pick ticket to help expedite restocking. This column is frequently left empty.

Charge Code – *(optional)* If PAR Excellence is being used to capture patient charges, this is the charge code for the chargeable items. It should be contained in the information extracted from the MM system. If PAR excellence is being used for replenishment only leave this column blank,

PAR Level – *(required)* The PAR Level for the items at the specified location. This number is expressed relative to the issue unit of measure.

Critical Alert level – *(optional)* If you want to track items with quantity on hand at or below a critical level for the item, put the appropriate critical levels in this column. This information may or may not be included in the data exported from the MM system.

Reorder Point – *(optional)* If you want to specify reorder points for each, put the reorder point in this column. This information is probably included in the data exported from the MM system. Keep in mind that PAR Excellence supports a very flexible reorder point calculation that does not include specifying a reorder point for each and every item.

Consignment – *(required)* If you want to flag any items as consignment items, put a **Y** in this column for those items. Normally, you will put and **N** in the first row and use the Fill Down function to copy the N to all lines.

Lot Number Required – *(optional)* If you are tracking Lot Numbers on any supplies as they are dispensed to a patient, put a **Y** in this column for any item that requires a Lot Number to be scanned. This column is typically left empty.

Serial Number Required – *(optional)* If you are tracking Serial Numbers on any supplies as they are dispensed to a patient, put a **Y** in this column for any item that requires a Serial Number to be scanned. This column is typically left empty.

Exp Date Required – *(optional)* If you are tracking Expiration Date on any supplies as they are dispensed to a patient, put a **Y** in this column for any item that requires an Expiration Date to be scanned. This column is typically left empty.

Item Class Name – *(not used at this time)*

Item Class Code – *(optional)* If you want to assign classification codes to any of the items, enter the 1 to 6 character code in this column. This code can be used when printing labels to print labels in groupings. This column is typically left empty.

Order Minimum – *(required)* If the item requires ordering a minimum quantity, specify the quantity in this column. Normally, you will put and **1** in the first row and use the Fill Down function to copy the 1 to all lines.

Order Multiple – *(required)* If the item requires ordering in specific multiples, specify the multiples value in this column. Normally, you will put and **1** in the first row and use the Fill Down function to copy the 1 to all lines.

Location Name for MM Interface – *(optional)* If you know the name that will be used for the MM Interface (which is entered on the Location maintenance screen) you can put it in this column. This column is typically left empty.

Import Data

After you have built the templated and saved it on your computer, select the **Import Data** function. On the **Import Template Data** screen, enter the name of the file that contains the data to be imported.

You must enter the full path name for the file so the simplest thing to do is use the **Browse** button and navigate to the folder where you saved the file. Select the file and click the **Open** button on the browse dialog.

Once the file is selected, click the **OK** button.

The program will pull all the data from the import spreadsheet and validate all the data to insure the data integrity of the system is not compromised.

A detailed listing of all the changes that will be made is displayed at the bottom of the screen. If there are any errors in the data they will be displayed in this list in red. To find the errors, scroll through the list of changes until you see the red lines. The program will tell you the exact line in the spreadsheet where the error was detected and a description of the problem.

You will not be able to complete the import until all errors are corrected.

Even if there are not any errors, you are encouraged to scroll through the list of changes to make sure they all look reasonable.

Finishing the Import

If you were alerted that there were errors in the data, review the information at the bottom of the screen and make a note of all the lines in red. Then click the **Cancel** button.

Locate the spreadsheet containing the import data and go to the line(s) with the error and change the data to correct the error. Save the spreadsheet after all errors have been correct.

Return to the **PAR Admin** menu (in PAR Client) and select the **Import Data** function. When you click the **Browse** button, the system will display the last folder used by the program so it should be easy to reselect the spreadsheet to be imported. Select the spreadsheet and click **Open** and then click **OK**.

When there are no errors you will be able to **Save** the data to complete the import.

