

PAR EXCELLENCE SYSTEMS

PAR Vision

USER GUIDE



PAR Excellence Systems
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Dashboard

Dashboard

The Dashboard is the first screen you see when you enter the PAR Vision system. This screen gives you access to all PAR Vision functions via the menu on the left side, as well as, statistics and warnings about important information in the system.

Each of the dashboard statistics includes a visual indicator that will immediately alert you to potential problems in the system.

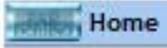
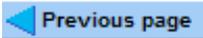
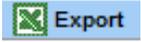
-  Tells you that everything is fine and no further action is necessary.
-  Is a warning of a potential problem and further review of the related data is warranted.
-  Indicates a problem that should be addressed.

The topics described in this section include:

- Navigating PAR Vision
- PAR Vision Menu
- Dashboard Statistics

Navigating PAR Vision

The PAR Vision menu bar which appears at the top of every screen contains the main buttons which are used for navigating between screens. The buttons that appear in the menu bar are:

	From anywhere in the system you can click this button to return to the PAR Vision Dashboard.
	Click this button to go back to the previous page. This button is available on many screens after you have click on an item to drill-down to a more detailed view of the data.
	Click this button to get help for the screen that is currently displayed. Once the help screen is displayed you can get additional help for other PAR Vision screens and functions using the table of contents and search function in the help system.
	Almost every PAR Vision screen can be exported to Excel so you can do further analysis and calculations. Click this button and then follow the prompts on the screen to save data to an Excel file.
	For PAR Vision functions that offer a Hit List capability, this button will appear. Click the Hit List button to see the top entries in the selected analysis.

Making Selections

Whenever a button, link or piece of data is selectable in PAR Vision, the cursor will change from the default pointer (an arrow) to a hand with a pointing finger.



Cursor pointer for making PAR Vision selections.

Many times the selectable fields on a screen are obvious, however, in PAR Vision, many not-so-obvious fields are also selectable. This is especially true on screens where you can **drill-down** on the data to get more detailed information about an item or PAR Locations. When you hover the cursor over a piece of data, if it changes to the "pointing finger", click on the data to drill-down to a more detailed view of the data.

Expanding Menu Selection and Dashboard Statistics

All of the PAR Vision menu selections and dashboard statistics are organized into expandable and collapsible groupings. Locate the grouping that contains the function you want to use and click the to see the selections in the group. If you are finished with the functions in a group and want to collapse the selection to make other functions easier to locate, click the .

Caregiver

Click the plus sign () to expand a selection.

Caregiver
 Caregiver Compliance Analysis
 Caregiver Time Analysis

Click the minus sign () to collapse the selection

Miscellaneous Help



When this help icon is displayed, you can click to get additional help on a specific section of the screen or a message.



The clock icon is used to inform you that the related data is *not* accurate up to the minute. Many of the PAR Vision functions use data that was analyzed and summarized during the nightly batch process. This is data that typically spans multiple months, so summarizing the data once a day is normally accurate enough for the statistics that are being presented.

PAR Vision Menu

The PAR Vision Menu located on the left side of the dashboard lets you access any of the functions for which you have been authorized. To select a function move the cursor to the desired function on the menu (the item will be underlined and the cursor will appear as a hand with a pointing finger) and click.

From any screen in the system you can immediately return to the dashboard so you can make a new menu selection by clicking the **Home** button in the top left corner of the screen. For a complete description of how to Navigate around the PAR Vision screens, see [Navigating PAR Vision](#).

The menu items are grouped in categories to make it easy to locate the function or report you want to run.

Web Req

Requisition Items - This function lets you requisition blue-label items for a PAR Location.

Request Items - Dispense items from a location to a patient or a department.

Caregiver

Caregiver Compliance Analysis - Statistics and reports on system usage compliance focused on the usage by the Caregivers.

Caregiver Time Analysis - See how much time the Caregivers spend using the PAR Excellence system and what it would take to achieve 100% compliance.

Data Analysis

Graphical PAR Location Analysis - A graphical representation of the items at a PAR Location intended to depict the physical layout of the items on the shelves.

PAR Levels

PAR Level Analysis - A graphical analysis of the usage of items in a location versus the current PAR Level.

PAR Level Recommendations - Recommended PAR Levels for a location based on average daily usage.

PAR Level Recommendations by Cost - Recommended PAR Levels for a location based on average item cost.

SKU Reduction Recommendations - The system recommends items that can be removed from inventory at a PAR Location.

Items Over PAR Level - Items that currently have quantity on hand greater than their PAR Level.

Stock Outs and Critical Hits - How many times an item was reduced to zero quantity on hand and to the critical level over a specified period of time.

PAR Level Value Over Time - The value of PAR Location inventory (based on item cost) as it has change over a specified period of time.

Consumption

Average Monthly Usage - A graphical analysis of inventory usage for PAR Locations.

Consumption Analysis - Inventory analysis based on usage and cost.

Consumption Deviation - Displays items with usage that deviates significantly compared to previous months.

Consumption Over Time - Consumption information by PAR Location month by month over the past six months.

Usage by Physician Summary - Item usage summarized by Physician and procedure.

Compliance

Compliance Analysis - An analysis of how effectively the PAR Excellence system is being used to manage inventory.

Compliance by Group - If you are using PAR Location Groups, you can get a summary level picture of the compliance for the Group and then drill down into the detailed Compliance Analysis.

PAR Charge Compliance - A compliance calculation based on the patient charge transactions recorded at a PAR Charge location versus the departmental issues recorded at the Parent location.

Revenue

Charge/Non-Charge Analysis - Analysis of potential additional revenue generated by changing non-chargeable items to chargeable.

Patient Charge Markup Analysis - Additional revenue that could be generated by increasing the markup on chargeable items.

Setup

PAR Level Minimums and Maximum - Define the PAR Level minimum and maximum values used in the PAR Level Analysis reports.

Usage Normalization Factors - Define the normalization factors that can be used in the Consumption Analysis reports.

Reports

Activity Detail - Shows all activity for a specified date range. Activity can include; item issues, receipts and adjustments, blue-label requisitions and patient ADT.

Quantity On Hand - Shows current quantity on hand and on order for items and how it relates to PAR Level and critical level.

Department Transactions - Detailed list of transactions for items dispensed/credited to a department (versus a patient).

Patient History - A list of transactions for all patients in the PAR Excellence system.

Current Patients - The list of patients currently displayed on a PAR Excellence display board.

Cycle Count Sheets - Items scheduled to be reconciled by a PAR Location based on the Cycle Count processing function.

Order Reports

Existing Orders - Displays open order or all orders for a PAR Location (including order detail).

Order Preview - Displays items that would be ordered if orders were generated now.

Item Reports

Item Master - Everything about an item except quantity on hand.

Item History - All activity in the system for a specified item over a date range.

Reconciliation History - Information about reconciliation activity over a specified date range.

Most Recent Reconciliation per Item - Shows the last time each item was reconciled and the details of that reconciliation.

Administration

User Administration - Define PAR Vision users and set privileges such as; functions allowed and viewable PAR Locations.

System Administration - Set PAR Vision system level parameters (i.e., parameters that apply to all users).

Dashboard Statistics

The PAR Vision Dashboard statistics will tell you in an instant the status of many of the important inventory issues. The graphical green ball, yellow ball, red ball presentation allows you to spot

problems at a glance eliminating the need to analyze detail data in areas where there are no problems.

To perform further analysis of a problem area, click on the colored ball to see the detail that generated the warning.

Equipment Status

This section tells you the health of your PAR Excellence equipment. A green ball lets you know that everything is running properly and communicating with the host computer. A yellow ball alerts you to a possible problem with one of the display boards. A red ball indicates a known problem with a display board that should be attended to immediately.

Caregiver Status

This section provides information to the patient caregivers that will allow them to avoid patient charging problems caused by moving patients or patients who arrive on the floor before the ADT information has been completely processed.

Caregiver Compliance Status

These statistics can alert the hospital management of problems with the caregiver's usage of the PAR Excellence system. Proper usage of the system is essential if the system is going to effectively manage the PAR Location inventory and apply patient charges (where appropriate). Perfect compliance is achieved when all items removed from inventory are properly recorded in the system by touching the item iButton (or scanning the bar code). The result would be that no adjustments would be necessary to reconcile the quantity on hand.

Compliance Status

These statistics are similar to the Caregiver Compliance statistics, however, the detail behind the statistics is more specific about the type of transactions that affect compliance. The purpose of the statistics is to indicate the percentage of time the PAR Excellence system is being used to record inventory transactions. These could be iButton touches, bar code scans or functions in the PAR Excellence online software program. Poor compliance results from items being removed from inventory but not recorded in PAR Excellence.

Materials Management

There are several statistic in this section that deal with Materials Management functionality in the PAR Excellence system. Use these alerts to insure that your day-to-day inventory operations are running smoothly and nothing is being overlooked.

Interfaces Status

This section of the dashboard will alert you to problems with the communications between PAR Excellence and other hospital systems. Depending on the options set for your installation, the PAR Excellence system can be sharing data with a number of other systems, including Patient Accounting and ADT, as well as, other miscellaneous systems.

Data Cleansing

The utilities in this section will alert you to inconsistencies in the PAR Excellence database. For example, if an item is marked chargeable in the Item Master but then is listed as non-chargeable in one of your locations, this might be an indication of a problem with the item definition (either in the Master file or at the location). Many of the anomalies reported in this section are valid in the PAR Excellence system, however, they are not what is found in a typical installation.

Tools

These utilities are used to locate items, setup locations and other miscellaneous activities relevant to the PAR Excellence system.

Equipment Status

Indicates the status of system communications between the server and PAR Excellence devices (such as Display Boards and PAR Bins). The ball indicator allows at-a-glance status determination. Depending on the PAR Excellence equipment you have installed at your hospital, you may not see all the status indicators listed below.

Patient Display Board Status:

-  The last communication for all devices was within the last 30 minutes. The display reads "Communication status: Communications okay".
-  The last communication was more than 30 minutes but less than an hour. The display reads: "Communication status: Last attempt [date] [time]".
-  The last communication was more than an hour ago. The display reads "Communication status: Last attempt [date] [time]".

PAR Bins Status:

-  All PAR Bins are communicating with the server and operating properly.
-  There are problems with some PAR Bins.

If you click on the ball or the message you can see the details behind the [Equipment Status](#).

Caregiver Status

This dashboard indicator lets you know if there are any outstanding Empty Bed Charges. Empty bed charges should always be addressed as soon as possible to avoid lost charges or charging the wrong patient.

The color of the light indicators signal the following:

-  There are no outstanding Empty Bed Charges.
-  The number of Empty Bed Charges and the age of the oldest.

Clicking on the red ball will display the screens where you can further analyze the Empty Bed Charges.

Caregiver Compliance Status

The system administrator has selected all of the PAR Locations for which you have management responsibility. The multi-colored light indicators allow at-a-glance status determination of your PAR Locations' overall compliance for the last 30 days.

Compliance statistics measure how effectively the staff is utilizing the PAR Excellence System when dispensing items. The higher the compliance percentage, the more effective the system will become. Each time a caregiver fails to touch an iTag or scan a BarTag, compliance figures are negatively impacted.

The number indicated is the percentage of the times actual touches were made when items were dispensed or credited. A 90% compliance figure indicates that 90% of the time, caregivers actually touched or scanned white labeled iTags or BarTags when supplies were dispensed.

The display indicates the compliance percentage for patient chargeable items, non-chargeable items and a total of both categories.

The color of the light indicators signal the following:

	The compliance percentage is 91-100. No action is necessary.
	The compliance percentage is 86-90. Compliance is suspect, further analysis is recommended.
	The compliance percentage is 0-85. Compliance is not acceptable, further analysis is highly recommended.

Clicking on any of the 3 lines will take you to the [Caregiver Compliance Analysis](#) data which will provide the detail required to positively affect you PAR Locations' compliance percentage and the effectiveness of the PAR Excellence System. You can also click on the menu selection for "Caregiver Compliance Analysis" (on the left side of the screen) to gain access to the Caregiver Compliance Analysis data.

Compliance Status

The system administrator has selected all of the PAR Locations for which you have management responsibility. The multi-colored light indicators allow at-a-glance status determination of your PAR Locations' overall compliance for the last 30 days.

Compliance statistics measure how effectively the staff is utilizing the PAR Excellence System when dispensing items. The higher the compliance percentage, the more effective the system will become. Each time a quantity adjustment is made to an item, compliance figures are negatively impacted.

The number indicated is the percentage of items adjusted out of inventory versus the number of dispense and credit transactions that were actually recorded. A 90% compliance figure would indicate that 90% of the time the system is being used as intended and only 10% of the time adjustments are necessary to correct the inventory levels.

The display indicates the compliance percentage for patient chargeable items, non-chargeable items and a total of both categories.

The color of the light indicators signal the following:

	The compliance percentage is 91-100. No action is necessary.
	The compliance percentage is 86-90. Compliance is suspect, further analysis is recommended.
	The compliance percentage is 0-85. Compliance is not acceptable, further analysis is highly recommended.

Clicking on any of the 3 lines will take you to the [Compliance Analysis](#) data which will provide the detail required to positively affect you PAR Locations' compliance percentage and the effectiveness of the PAR Excellence System. You can also click on the menu selection in the Data Analysis section for "Compliance Analysis" (on the left side of the screen) to gain access to the Compliance Analysis data.

Materials Management Status

This section of the dashboard displays statistics about several important Materials Management topics. In general, when the status ball is red or yellow you can click on the ball to see the detail information related to the dashboard warning.

More information on most of these reports can be found in the Materials Management section of this document.

More information about Open Orders can be found in the [Order Reports](#) section in the [Existing Orders](#) topic.

Open Orders:

	There are no open orders.
	There are open orders less than 7 hours old.
	There are open order greater than 7 hours old.

Critical Items:

	There are no critical items.
	There are 5 or fewer critical items.
	There are more than 5 critical items.

Negative Quantities on Hand:

	There are no items with a negative quantity on hand.
	There are items with a negative quantity on hand.

Unregistered iButton Touches:

	There have been no unregistered iButton touches in the past week.
	There have been unregistered iButton touches in the past week.

Pending Charges:

-  There are no pending charges or all pending charges are 2 days old or less.
-  There are pending charges 3 or 4 days old.
-  There are pending charges 5 or more days old.

Expiring Items:

-  There are no items that are going to expire in the next 90 days.
-  There are items that will expire in 60 to 90 days.
-  There are items that will expire in less than 60 days.

Expiration Date Exceptions:

-  There are no expiration date exceptions.
-  There are expiration date exceptions (negative quantity for a date or no date).



Expiring Items and **Expiration Date Exceptions** only appear if the Expiration Date feature is installed.

Cycle Count:

-  All PAR Locations are on schedule on reconciliation cycle counting.
-  Some locations are behind schedule on reconciliation cycle counting, but not by more than one cycle.
-  Locations are behind schedule on reconciliation cycle counting and some are more than one cycle behind.

Interfaces Status

This section of the dashboard gives you statistics about PAR Excellence interfaces to other hospital systems. Review this information periodically to insure that data is flowing between the systems in a timely manner.

In addition to the statistics described below, this section of the dashboard also includes the Charge Analysis statistics. More information on these statistic can be found in the [Charge Analysis](#) section of this document.

Patient Charge Batches:

-  Patient charge batches have recently been built.
-  No patient charge batches have been since the date displayed in the message. Determine why patient charge batches are not being built and take corrective action.

ADT:

-  ADT data is being received in a timely manner and no action is necessary. The message displays the time since the last ADT transaction was received.

-  The length of time since the last ADT transaction is greater than normal, but not critical. If you are aware of a reason for the delay in receiving ADT transactions no action is necessary, otherwise, you should verify that the communications between PAR Excellence and the ADT system is working properly.
-  The interface between PAR Excellence and the ADT system appears to have failed. Determine why PAR Excellence is not receiving ADT transactions and take corrective measures.

Queued Files:

-  There are no files queued for PAR Excellence, or the number of files and length of time they have been queued is normal. The message indicates the number and type of each file queued.
-  Files have been queued for processing by PAR Excellence for a longer than normal period of time. Verify that all PAR Excellence processes are running properly.
-  The PAR Excellence programs that process queued files appear to have failed. Determine why the queued file are not being processed and take corrective action.

System Backup:

-  The system backup is current.
-  The system was backed up recently, but should be backed up again soon.
-  The system needs to be backed up.

Charge Analysis

Presents the status of the last Charge Batch Analysis showing the date of the batch, the number of lines and total quantity of charges and the number and total quantity of credits. If there is no charge interface in place or a batch interface is in place but no batches have been created yet, this will not appear on the screen. If a batch is not produced for a day or more, the system will indicate that. If the number of charges being produced departs from the average of the preceding four weeks, the system will indicate that.

-  Charge batch data is current and the data is consistent with the data from the previous four weeks.
-  Charge batch is not current but it is less than 3 days old.
-OR-
The analysis of the charge batch data differs by more that 20% compared to the previous four weeks.
-  Charge batch is not current and it is greater than 3 days old.
-OR-
The analysis of the charge batch data differs by more that 50% compared to the previous four weeks.

If you click on the ball or the message you can see the details behind the status.

Data Fields

If the charge batch data is not current (the first yellow or red scenario described above), if you click on the message or ball you will drill-down to a screen that gives you a list of charge batch that have not yet been purged from the system. The screen shows:

- The date and time the batch was created.
- The date and time the batch was extracted.
- The name of the batch.
- The number of items in the batch.

If the charge batch data is current but the number of charges differs by more than 20% from the previous four weeks (the second yellow or red scenario described above), if you click on the message or ball you will drill-down to a screen that shows the analysis of this weeks data versus the previous four weeks. The screen shows:

- # of Charges this week.
- Average # of Charges for the prior 4 weeks.
- % change this week versus the average of the prior 4 weeks.
- # of Charges for each of the prior four weeks.

Data Cleansing Status

The utilities in this section will alert you to inconsistencies in the PAR Excellence database. Many of the anomalies reported in this section are valid in the PAR Excellence system, however, they are not what is found in a typical installation.

Chargeable and Non-Chargeable Across Multiple Locations:

This utility will tell you if you have items that are chargeable at one (or more) locations and non-chargeable at other location(s). It will also let you change the item so it is consistent across all locations. You should look at each item carefully because it is valid in some situations for an item to be chargeable at one location and not another.

Chargeable Items without Charge Codes:

This utility will tell you if you have chargeable items but no associated charge code. It will also let you change the item to non-chargeable or assign a charge code. The items in this list should generally be changed one way or the other since this is an inconsistency that is never valid.

Unit of Measure Differences Across Multiple Locations:

This utility will tell you if you have items with differing Issue Unit or Measure and/or Replenishment Unit of Measure within different PAR Locations. This is another data cleansing alert that may be completely valid for your hospital because it is certainly possible that an item is replenished by the Each in one location but by the Box in another (for example). You can review each item and change the entries that are not correct.

Tools



Item Locator – A report which can be used to lookup an item at one or more PAR Locations.



PAR Bin Items Without Reference Weights – This report will show you all items that are stocked at a PAR Bin location that do not have a reference weight in the system. Every item on a PA Bin scale must have a reference weight.

Equipment Status Reports

Equipment Status Reports

This section describes the detail reports that are displayed when you drill-down on one of the Equipment Status dashboard entries. Depending on the PAR Excellence equipment you have installed at your hospital, you may not see all the reports described in this section.

The Equipment Status reports include:

[Patient Display Board Status](#)

[PAR Bins Status Summary](#)

[PAR Bins Status](#)

[PAR Bins Troubleshooting](#)

Patient Display Board Status

This report displays the current status of all your Patient Display Boards (PDB).

Selection Criteria

There are 2 possible status conditions: one for devices on “Test” status and one for devices on “Live” status. If both conditions are applicable and both are in Red status you would then have to select one or the other. Otherwise, only one will appear and no selection is required.

Data Fields

Device number - The number assigned to the Patient Display Board.

PDB - Patient Display Board name (location of the board)

Last Successful - The last time that the board communicated with the system.

Communications Failures - The number of failures on the last 2 days on which there were failures.

Current - The number of failures that have occurred since the last successful communication.

Sorting Capabilities

PDB (Patient Display Board) is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Bins Status Summary

This screen shows you a summary of the status of all your PAR Bins locations. Each location is listed with a summary of the number of scales with critical problems, warnings and no problems.

Data Fields

Status - The overall status of the location. A **RED** ball indicates there are problems at the location, a **YELLOW** ball means there are only warnings and a **GREEN** ball means everything is fine.

PAR Location - The name of a PAR Bins location.

Items - The number of items in the location. If there are items in the location that are not registered to scales they will also be included in the number.

Scales - The number of scales at the location. This number represents the total number of scales which may be larger than the number of items if you are using tandem scales at the location.

 The number of scales at the location that have errors.

 The number of scales at the location that have warnings.

 The number of scales at the location that have no problems.

Sorting Capabilities

The **Status** indicators are the default sort sequence for this display. Locations with the most problems will be displayed at the top.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location in the list to see the [PAR Bins Status](#) for that location.

PAR Bins Status

This report is displayed when you drill-down on a PAR Location from the PAR Bins Status Summary. The report gives you comprehensive analysis of the status of your PAR Bins equipment. In order for PAR Bins to be effective, the bins must be in constant communication with the server. In addition, it is important to monitor the quantity on hand for each bin because a bin with a quantity on hand that is less than zero or is significantly higher than the PAR level could be an indication of a bin malfunction even if the bin is communication with the server.

The report has two display modes. The default mode is a standard tabular view of all the bins. In this mode you can sort on any column on the screen using the standard PAR Vision sort

capabilities. The other mode is a graphical view of the bins. This mode can help you visualize the layout of the bins at the location to assist in locating the bin(s) with a problem. You can toggle between the two views using the icon at the top of the screen (to the left of the PAR Location selection box).

The function lets you monitor the status of the bins without the need to physically visit the bins. If a problem is detected, the utility provides a *wizard* that will help you in diagnose the problem. To conclusively determine and correct the problem, you will need to physically visit the bin.

This function will alert you to the following PAR Bins issues:

Overdue Communication - The bin did not communicate with the server the last time it was scheduled to communicate. During normal production usage, the bin will communicate to the server once each hour. If a bin has gone more than two hours without communicating, it should be checked to determine why the communication is failing.

Negative Weight - Obviously, a bin cannot contain a weight less than zero. When the bin is empty, it should report a weight (around) zero. If the bin is reporting a negative weight there might be something pushing on the bin or, possibly, the scale was not zeroed properly.

Quantity Over PAR Level - The bin is reporting a quantity on hand that is greater than the PAR Level. It is quite possible that there is no problem with this bin and it actually contains more items than the PAR Level that was set for the bin. This could happen if items were returned to the bin after orders were built and received. It could also, however, be a problem with the bin calibration. When it is convenient, the bin should be checked to insure that it is operating properly.

Over Scale Capacity - There is more weight in the bin than is recommended for this size bin (and scale). *This is an issue that should be dealt with as soon as possible.* Excess weight in the bin for a prolonged period of time will damage the scale mechanism and the bin readings will no longer be accurate.

Missing g/uiss (reference weight) - This means that the item does not have a reference weight assigned in the system. Without a reference weight the system cannot calculate a QOH. You should use the setup cart with the Re-Weigh function to capture the reference weight for the item as soon as possible.

Selection Criteria



or



– These buttons let you toggle between the graphical presentation of the bins and the tabular presentation. If you are looking at the tabular view you can click on the picture of the bin to see the graphical view. When looking at the graphical view, click the picture of the table to see the tabular view.

Location - Select the PAR Bins location to be reviewed.

Refresh - Click this button to refresh the data on the screen. This button is very useful in the following circumstances:

- You are looking at this screen while you (or someone else) is actually trying to correct a problem with a bin. You can refresh the screen periodically (or when instructed) to see if the changes made to the bin were successful.

- You are viewing the screen over a long period of time that may include a communication cycle between the bin(s) and the server .Refresh the screen to see the up-to-the-minute status of the bins.



The screen will refresh itself automatically every few minutes but you can use the Refresh button to request an immediate refresh.

Status Filter - Click this button to get a pop-up screen with options that let you focus on one or more specific type of problem. You can un-check selected problem types so they are not included in the status display. For example, if you are trying to diagnose a communications problem, you may want to un-check all options except Overdue Communication so the only highlighted bins are those that are not communicating.

Check the box to include the problem in the status display or un-check the box to ignore this type of problem on the display. After all selections are made, click the **OK** button. To exit the pop-up without making any changes, click **Cancel**. You can use the **All Off - All On** button to toggle between all options being checked or un-checked.

The choices are:

Missing g/uiss (reference weight) - Check this box to see items that do not have a reference weight assigned in the system. Without a reference weight the system cannot calculate a QOH.

Negative Weight - Check this box to highlight bins with a total weight less than zero.

Over Scale Capacity - Check this box to highlight bins with a weight that is over the recommended weight limit for the scale.

Overdue Communication - Check this box to highlight bins that have not communicated with the server within the scheduled communications cycle.

QOH Over PAR Level - Check this box to highlight bins with a quantity on hand greater than the PAR Level for the location.



The options appear on the pop-up screen in alphabetical order, NOT the order of importance.

Locate Item - Use this field to type all or part of an item number or description to locate that item at the select PAR Location. Normally, you will enter a complete (unique) item number to locate an item. If you enter a partial number or description, the system will find the first item matching the partial entry. Type the number or description and the use the Tab key to exit the field, or press the Enter key, or click on the screen outside of the box.

Show Wires - If you are looking at the graphical view of the bins, you can check the Show Wires box to see the physical wiring diagram of the scales in the room. In order to see this information you must do a Wire Registration for the room. This display will only be meaningful is the display is sorted by Wire or Shelf Location.

Click to Enable Tare - When doing maintenance to the PAR Bins scales it is sometime necessary to "tare" the scale to reset the zero point of the scale. This is done by pressing the zero button on the scale when the bin is hanging on the scale but the bin is completely empty. If the tare is not done

properly the system cannot properly calculate the quantity on hand from the scale readings. In order to protect against improper taring of scales an administrator must enable this function (*using this button*) for a PAR Location.

PAR Bins Graphical Display

The main portion of the screen displays a graphical representation of the PAR Bins setup. The bins are three different sizes representing the scale capacity at that position. Small bins for small capacity scales and larger bins for higher capacity scales. Bins that are reporting an error are framed in **red** to make them easy to find.

You can use the bin display on the screen to direct yourself (or someone else) to the specific bin that has a problem. Find a bin that is highlighted in red and then count the number of rows down and the number of bins from the left and that will be the actual physical bin with a problem. For example, in the 2nd row, the 4th bin from the left has an error.

Move the cursor to the red highlighted bin and the information for that bin (including the error it is reporting) will be displayed on the left. To freeze the information on an item, click the bin. The "push pin"  will be inserted so the item information does not change as you move around the screen. To release the "push pin"  click again on any bin.

Data Fields

Item Info

Status - If the bin is reporting an error this field will be red and will tell you the error. Click on the error message to launch the [PAR Bins Troubleshooting wizard](#) to help you diagnose the problem (see below).

Item - The item number and description.

QOH - The quantity on hand for this item. Using the total weight in the bin and the average weight of each item, the system calculates the quantity on hand. The quantity is always rounded to a whole number.

PAR - The PAR Level for this item at this location.

UISS - The unit of issue for the item. This is the unit of measure in which the item is dispensed from the bin.

Per - The factor between the unit of issue and the unit of replenishment. For example, if an item is issued as an each and replenished as a box, this is the number of items in a box.

UREP - The unit of replenishment for the item. This is the unit of measure in which the item is restocked.

Bin Info

Shelf Loc. - The shelf location assigned to this bin (based on the most recent Shelf Registration).

Bin Size - The bin size attached to the scales(s).

g/uiss - The weight of each item in the bin. The system uses this weight to determine the number of items in the bin based on the total weight in the bin.

Weight - The total weight in the bin.

Scale Info

ID - Identification number of this bin.

Address - The internal address of the bin for communication purposes.

Max - The maximum weight that should ever be placed in this bin.

Tare - The bin calibration weight that was determined when the bin was set up.

Wire - The wire ID assigned to this bin (based on the most recent Wire Registration).

Model - The manufacturer's model number of this bin.

Ver - The version of the firmware in the bin (internal software that operates the bin).

Item Button - If the bin has an iButton for patient charging, this is the button identification.



You should pay attention to the **Max** value and insure that the total weight in the bin never exceeds this value (Note that the capacity is reported in kilograms which is 1000 grams). The other information in the Scale Info section of the analysis is used primarily by the PAR Excellence engineer when trying to diagnose a problem with the bin.

Sorting Capabilities

Shelf Loc. is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on the **red error message** in the Status field to launch the [PAR Bins Troubleshooting](#) wizard to help diagnose problems.

PAR Bins Troubleshooting

This wizard is intended to help you diagnose and resolve problems with your PAR Bins without assistance from PAR Excellence engineers. After following the steps recommended by the wizard, if you still cannot correct the problem, do not hesitate to call PAR Excellence Technical Support.

Procedures

Launch the wizard by clicking on the **Red Error Message** in the **Status** section of the [PAR Bins Status](#) display.

The wizard describes the problem and presents one of more possible reasons the problem may have occurred. Click on the reason that best matches your situation and the wizard will suggest a solution for you problem.

The diagram below further explains the use of the wizard.

1

Click here to return to PAR Bins Status

QOH Over PAR Level

QOH Over PAR Level can occur as the result of a calibration problem, but is more likely the result of either there truly being too many items in the bin or something pushing down on a scale from above.

The first step is to check on the scale and the contents of the bin. Please count the number of items in the bin and also check to make sure nothing is pushing on it from above.

The QOH is 6, the PAR Level is 4.

The count is higher than PAR. The count is less than or equal to PAR and nothing is pushing on the scale.

Select the answer that best matches your situation.

2

Click here to go back and change your previous answer

QOH Over PAR Level

You have indicated that the count at the location is higher than the PAR Level.

One reason for this is that someone could be placing more items in the bin than the system indicated should be.

Another possibility is a problem with the factor between the Unit of Issue and the Unit of Replenishment.

Unit of Issue: EA Unit of Replenishment: EA Factor: 1

No, the problem is not one of these

Follow the directions to solve the problem or select another answer.

Caregiver Compliance

Caregiver Compliance Analysis

The topics in this section describe the Caregiver Compliance reports in the PAR Vision system. You can access Caregiver Compliance information using the link in the Caregiver section of the PAR Vision Menu (on the left side of the dashboard), or by clicking the red, yellow and green balls in the Caregiver Compliance Status section of the dashboard.

The Caregiver Compliance reports and functions include:

[Caregiver Compliance Summary](#)

[Caregiver Compliance Hit List](#)

[Caregiver Compliance Ranking](#)

[Caregiver Compliance Summary by Month](#)

[Caregiver Compliance Details](#)

[Caregiver Time Analysis](#)

Caregiver Compliance Summary

This analysis allows management to review compliance statistics for all departments they manage. Compliance statistics measure how effectively the staff is utilizing the PAR Excellence System when dispensing items. The higher the compliance percentage, the more effective the system will become. Each time a caregiver fails to touch an iTag or scan a BarTag, compliance figures are negatively impacted.

The first column of this analysis indicates the PAR Location being reported on that particular row.

The second column "Rank" and the third column "Trends" will be discussed later.

The fourth column "Touches" displays the total number of times that white labeled iTags or BarTags have been touched or scanned in that PAR Location (for the selected time period – see Selection Criteria below). This count includes issues and credits – anytime an iTag/BarTag is touched.

The fifth column "Opportunities" displays the total number of opportunities when the caregivers should have touched a white labeled iTag/BarTag. This number is determined each time a reconciliation count is conducted. These counts are typically conducted by the Materials Management staff in order to verify the actual count of each supply at the PAR Location.

The sixth column "% Compliant" displays the percentage of opportunities when actual touches were made. A 90% compliance figure indicates that 90% of the time, caregivers actually touched or scanned white labeled iTags or BarTags when supplies were dispensed.

The seventh column "Adjust Values" (Adjustment Value) translates missing touches or scans into a dollar value. It is determined by calculating the difference between opportunities and touches and then multiplying that total by the selected price – either the item cost (cost to purchase the supply) or the patient cost (price charged to the patient, if this item is eligible for patient charge) – see Selection Criteria below. If the user is interested in determining the dollar amount of lost charges, the user should select "Chargeable Items Only" and then select "Use Patient Costs".

The eighth column "% Dollars Captured" displays an alternate methodology to judge the compliance percentage for this PAR Location. While column six "% Compliance" utilizes raw quantities of opportunities and touches, this column places value on the opportunities and touches utilizing the selected price – see Selection Criteria below.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - You can select to use "Item Cost" or "Patient Cost".

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

PAR Location - The PAR Location.

Rank - A link to the [Caregiver Compliance Ranking](#) screen which shows how a select PAR Location ranks compared to other locations.

Trends - A link to the [Caregiver Compliance Summary by Month](#) screen which shows how compliance is trending.

Touches - The total number of times an item button was touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

Opportunities - The total number of times an item button should have been touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

% Compliant - The compliance percentage based on touches and opportunities.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to compliance.

Sorting Capabilities

PAR Location is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

PAR Vision provides the ability to drill down on the information provided in this analysis. This allows more detailed information to be displayed. To drill down, the user places his cursor on the appropriate spot on the display and simply clicks the left button on the mouse.

Rank - A link to the [Caregiver Compliance Ranking](#) screen which shows how a select PAR Location ranks compared to other locations.

Trends - A link to the [Caregiver Compliance Summary by Month](#) screen which shows how compliance is trending.

PAR Location Compliance Details - Clicking anywhere else within a selected row displays the [Caregiver Compliance Details](#) for a PAR Location. This detail view shows the compliance for each item at the location which will help in determining the problem items.

Hit Lists

By clicking on the “Hit List” logo in the top right corner of the report page, PAR Vision provides additional focus to the information displayed in this report. With this feature we attempt to focus management’s attention to the areas and items that require a priority resolution.

Hit List Displays:

- PAR Locations Needing the Most Improvement.
- PAR Locations with the Most Adjustment Value.
- PAR Locations with the Least % Dollars Captured.
- The top 10 Items Needing the Most Improvement Across All Locations.
- The top 10 Individual Items Needing the Most Improvement.

Please note that the **Hit List** and **Drill Down** pages also include their own help pages.

Caregiver Compliance Hit List

This drill-down provides a focal point for the user to begin to improve compliance.

It displays the following lists:

- Locations Needing the Most Improvement
- Locations with the Most Adjustment Value
- Locations with the Least % Dollars Captured
- The Top Items Needing the Most Improvement Across All Locations
- The Top 10 Individual Items Needing the Most Improvement

Armed with this data, management can begin to focus on the areas where improvement is most needed.

Selection Criteria

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Exclusions - Click this button if you want to exclude a PAR Location or Item from any of the lists displayed. You can use exclusions to remove locations or items that are already being evaluated, or for some reason, need not be evaluated.

See [Exclusion](#) for more information on excluding entries from the Hit List.

Data Fields

Locations Needing the Most Improvement

The criteria used to determine the Locations is the Compliance Percentage.

- PAR Location
- Compliance

Locations with the Most Adjustment Value

The criteria used to determine the Locations is the Adjustment Value totaled for all items in the PAR Location.

- PAR Location
- Adjust Value

Locations with the Least % Dollars Captured

The criteria used to determine the Locations is the % Dollars Captured for all items in the PAR Location.

- PAR Location
- % Dollars Captured

The Top 10 Items Needing the Most Improvement Across All Locations

The criteria used to determine the top 10 Items is the Absolute Adjustment Value Summed across all PAR Locations. Absolute means both up and down adjustments are first stripped of their sign (+ or -) and then added together.

- Item Number
- Item Description
- Absolute Adjust Value Sum

The Top 10 Individual Items Needing the Most Improvement

The criteria used to determine the top 10 items is the Adjustment Value of the Item within a PAR Location.

- PAR Location
- Item Number
- Item Description
- Adjust Value

Caregiver Compliance Ranking

This drill-down displays how the selected PAR Location compares to all other PAR Locations in five categories.

Those categories are:

- Touches
- Opportunities
- % Compliant
- Adjust Value (Adjustment Value)
- % Dollars Captured

This drill-down provides the raw number for each of the categories listed above. Beneath the raw number is the rank of this particular PAR Location in relation to all of the other PAR Locations within the facility.

The total number of PAR Locations included in this comparison is provided directly above the chart.

For example – If the rank under the column "Touches" displays 4, this indicates that the selected PAR Location has the fourth highest number of touches. If the rank under the "% Compliant" column displays 18, this indicates that the selected PAR Location has the 18th highest percentage of compliance.

Selection Criteria

Cost Type - You can select to use "Item Cost" or "Patient Cost".

Report Period - Select the reporting period from the drop down list (will default to the reporting period selected on the Summary screen):

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

For each column in the table, the screen shows the information for the selected PAR Location and where that ranks this location relative to other locations.

Touches - The total number of times an item button was touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

Opportunities - The total number of times an item button should have been touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

% Compliant - The compliance percentage based on touches and opportunities.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to compliance.

Caregiver Compliance Summary by Month

This drill-down graphically displays the trend of compliance activity over the last six months for the selected PAR Location.

The blue line indicates the trending of the "% Compliant" while the gold line indicates the trending of the "% Dollars Captured".

Directly beneath the line graph is the raw data that is utilized in the line graph.

The first column displays the month for which the data represents.

The second column "Touches" displays the total number of times that white labeled iTags or BarTags have been touched or scanned in that PAR Location (for the selected time period – see Selection Criteria below). This count includes issues and credits – anytime an iTag/BarTag is touched.

The third column "Opportunities" displays the total number of opportunities when the caregivers should have touched a white labeled iTag/BarTag. This number is determined each time a reconciliation count is conducted. These counts are typically conducted by the Material Management staff in order to verify the actual count of each supply at the PAR Location.

The fourth column "% Compliant" displays the percentage of opportunities when actual touches were made. A 90% compliance figure indicates that 90% of the time, caregivers actually touched or scanned white labeled iTags or BarTags when supplies were dispensed.

The fifth column "Adjust Values" (Adjustment Value) translates missing touches or scans into a dollar value. It is determined by calculating the difference between opportunities and touches and then multiplying that total by the selected price – either the item cost (cost to purchase the supply) or the patient cost (price charged to the patient, if this item is eligible for patient charge) – see Selection Criteria below.

The sixth column "% Dollars Captured" displays an alternate methodology to judge the compliance percentage for this PAR Location. While column four "% Compliant" utilizes raw quantities of opportunities and touches, this column places value on the opportunities and touches utilizing the selected price – see Selection Criteria below.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - You can select to use "Item Cost" or "Patient Cost".

PAR Location - Select a PAR Location (will default to the location selected on the Summary screen).

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

For each **Month** in the selected reporting period, the screen shows the information below for the selected PAR Location.

Touches - The total number of times an item button was touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

Opportunities - The total number of times an item button should have been touched with the touch probe (or bar code scanned) at this PAR Location during the reporting period.

% Compliant - The compliance percentage based on touches and opportunities.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to compliance.

Sorting Capabilities

Month is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Caregiver Compliance Details

This drill-down allows management to review compliance statistics for a specific department. Compliance statistics measure how effectively the staff is utilizing the PAR Excellence System when dispensing items. The higher the compliance percentage, the more effective the system will become. Each time a caregiver fails to touch an iTag or scan a BarTag, compliance figures are negatively impacted.

By sorting this drill-down, utilizing the sixth column "% compliant", the user can easily identify problem items.

The first column of this analysis indicates the item number being reported on that particular row.

The second column displays the item description.

The third column indicates if the item is a patient chargeable item or a non-charge item.

The fourth column "Touches" displays the total number of times that the iTag or BarTag for the selected item was touched or scanned in that PAR Location (for the selected time period – see Selection Criteria below). This count includes issues and credits – anytime the iTag/BarTag is touched.

The fifth column "Opportunities" displays the total number of opportunities when the caregivers should have touched the iTag/BarTag for the selected item. This number is determined each time a reconciliation count is conducted. These counts are typically conducted by the Material Management staff in order to verify the actual count of each supply at the PAR Location.

The sixth column "% Compliant" displays the percentage of opportunities when actual touches were made for the selected item. A 90% compliance figure indicates that 90% of the time, caregivers actually touched or scanned the iTag or BarTag when this supply was dispensed.

The seventh column "Adjust Values" (Adjustment Value) translates missing touches or scans into a dollar value. It is determined by calculating the difference between opportunities and touches and then multiplying that total by the selected price – either the item cost (cost to purchase the supply) or the patient cost (price charged to the patient, if this item is eligible for patient charge) – see Selection Criteria below. If the user is interested in determining the dollar amount of lost charges, the user should select "Chargeable Items Only" and then select "Use Patient Costs".

The eighth column "% Dollars Captured" displays an alternate methodology to judge the compliance percentage for this PAR Location. While column six "% Compliant" utilizes raw quantities of

opportunities and touches, this column places value on the opportunities and touches utilizing the selected price – see Selection Criteria below.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items). This selection is pre-set to the selection you made on the Summary screen.

Cost Type - You can select to use "Item Cost" or "Patient Cost".

PAR Location - Select a PAR Location (will default to the location selected on the Summary screen).

Report Period - Select the reporting period from the drop down list (will default to the reporting period selected on the Summary screen):

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Chargeable Indicator - Indicates whether the item is chargeable or non-chargeable.

Touches - The number of times the item button was touched with the touch probe (or bar code scanned) during the reporting period.

Opportunities - The number of times the item button should have been touched with the touch probe (or bar code scanned) during the reporting period.

% Compliant - The compliance percentage based on touches and opportunities.

Adjust Value - The value (based on the select cost) of the adjustments to the item inventory.

% Dollars Captured - The percentage of the value of the item that was correctly captured by the system due to compliance.

Sorting Capabilities

% Compliant is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Caregiver Time Analysis

This report lets you analyze how much time is being spent by the Caregivers using the PAR Excellence system.

For a typical Caregiver, use of the PAR Excellence system is limited to using the touch probe to touch patient buttons on the Patient Display Board and then touch an item button in the PAR Location inventory. The touch probe is then placed into the downloader on the Patient Display Board and the transactions are automatically recorded in the system.

This report adds up all the patient touches over a period of time and all the item touches over the same period then, using metrics that you provide, it calculates the total amount of time the Caregivers spend in an average day touching the buttons.

Selection Criteria

Based on data from - This setting determines how many transactions are used to do the analysis. The options are:

- yesterday
- the past week
- the past month

The report will run faster if you select the shortest interval (yesterday), however, the results might not be representative of a typical day. For example, depending on the type of hospital, the activity on a Sunday might be significantly less than a weekday. Selecting yesterday on a Monday, therefore, may not produce meaningful results.

Average time to find a patient - Enter the average number of seconds it take to locate and touch a patient button on the Patient Display Board. The default time of 5 seconds is based on statistics from several hospitals over the years.

Avg, incremental time per item - Enter the number of seconds it takes to touch an item button. Do not include the time it take to locate the item in the inventory since this time is necessary with, or without, the PAR Excellence system and equipment. Again, the default time of 1 second is based on statistics from hospital over time.

Data Fields

PAR Location - The name of a PAR Location.

Patient/Dept. Touches/Scans - This is the total number of patient or department touches that have been done over the selected time frame. The time required for these touches will use the *Average time to find a patient* value entered above.

Items - This is the total number of item touches that have been done over the selected time frame. The time required for these touches will use the *Avg. incremental time per item* value entered above.

Incremental Minutes Per Day Required for PAR Excellence System - This is the calculated time per day the Caregivers are spending using the PAR Excellence system.

Current Compliance - The compliance percentage for the PAR Location.

Additional Minutes Per Day Required for 100% Compliance - The additional time per day that would be spent by the Caregivers if there was 100% compliance using the PAR Excellence system. The total time required (if there was 100% compliance) would be the time currently being spent plus the additional minutes.



The times calculated above are minutes per day, so if you select the *past month* in the **Based on data from** drop-down box, the system will calculate the total time for all the touches extracted and divide by 30.

Sorting Capabilities

PAR Location is the default sort sequence for this report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Compliance

Compliance Analysis

The topics in this section describe the Compliance reports in the PAR Vision system. You can access Compliance information using the link in the Data Analysis (Compliance) section of the PAR Vision Menu (on the left side of the dashboard), or by clicking the red, yellow and green balls in the Compliance Status section of the dashboard.

The Compliance reports and functions include:

[Compliance Summary](#)

[Compliance Hit List](#)

[Compliance Ranking](#)

[Compliance Summary by Month](#)

[Compliance Details](#)

[Compliance Transactions](#)

[Compliance Adjustments Summary](#)

[Compliance Summary - Ad Hoc](#)

[Compliance By Group](#)

[PAR Charge Compliance](#)

[PAR Charge Compliance Details](#)

[PAR Charge Setup](#)

[PAR Bin Compliance](#)

Compliance Summary

Allows a multi-faceted view of system compliance so that any user may see how they rank with other areas or users, how their compliance trends over various time periods via the raw data and via that data graphed, the item detail behind the compliance numbers for All PAR Locations or a specific PAR Location and even the entire transaction history over various time periods for a selected PAR Location/item combination.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - You can select to use "Item Cost" or "Patient Cost".

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

PAR Location - The PAR Location.

Rank - A link to the [Compliance Ranking](#) screen which shows how a select PAR Location ranks compared to other locations.

Trends - A link to the [Compliance Summary by Month](#) screen which shows how compliance is trending.

Dispense Qty - The quantity of all items dispensed at the location during the time period (that were properly recorded in the system).

Credit Qty - The quantity of all items credited at the location during the time period (that were properly recorded in the system).

Adjust Qty (Net) - The adjustments that were necessary to reconcile the inventory at this location ((and location ranking).

% Compliant - Compliance for the location. Perfect compliance is when no adjustments are necessary to reconcile the inventory. That would mean all dispenses and credits are being properly recorded in the system.

Issue Value - The value (based on the selected cost) of all items that were properly issued (dispensed).

Credit Value - The value (based on the selected cost) of all items that were properly credited.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to good compliance.

Sorting Capabilities

PAR Location is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

PAR Vision provides the ability to drill down on the information provided in this analysis. This allows more detailed information to be displayed. To drill down, the user places his cursor on the appropriate spot on the display and simply clicks the left button on the mouse.

Rank - A link to the [Compliance Ranking](#) screen which shows how a select PAR Location ranks compared to other locations.

Trends - A link to the [Compliance Summary by Month](#) screen which shows how compliance is trending.

[Compliance Details](#) is displayed when you click on a PAR Location. This detail view shows the compliance for each item at the location which will help in determining the problem items.

[Transaction History Details for Compliance](#) for an item can be displayed from the details screen.

[Compliance Adjustments Summary](#) can be displayed from the Transaction History Details screen.

Hit Lists

By clicking on the “Hit List” logo in the top right corner of the report page, PAR Vision provides additional focus to the information displayed in this report.

Hit List Displays:

- PAR Locations Needing the Most Improvement.
- PAR Locations with the Most Adjustment Value.
- PAR Locations with the Least % Dollars Captured.
- The top 10 Items Needing the Most Improvement Across All Locations.
- The top 10 Individual Items Needing the Most Improvement.

Please note that the **Hit List** and **Drill Down** pages also include their own help pages.

Compliance Hit List

This drill-down provides a focal point for the user to begin to improve compliance.

It displays the following lists:

- Locations Needing the Most Improvement
- Locations with the Most Adjustment Value
- Locations with the Least % Dollars Captured
- The Top Items Needing the Most Improvement Across All Locations
- The Top 10 Individual Items Needing the Most Improvement

Armed with this data, management can begin to focus on the areas where improvement is most needed.

Selection Criteria

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Exclusions - Click this button if you want to exclude a PAR Location or Item from any of the lists displayed. You can use exclusions to remove locations or items that are already being evaluated, or for some reason, need not be evaluated.

See [Exclusion](#) for more information on excluding entries from the Hit List.

Data Fields

Locations Needing the Most Improvement

The criteria used to determine the Locations is the Compliance Percentage.

- PAR Location
- Compliance

Locations with the Most Adjustment Value

The criteria used to determine the Locations is the Adjustment Value totaled for all items in the PAR Location.

- PAR Location
- Adjust Value

Locations with the Least % Dollars Captured

The criteria used to determine the Locations is the % Dollars Captured for all items in the PAR Location.

- PAR Location
- % Dollars Captured

The Top 10 Items Needing the Most Improvement Across All Locations

The criteria used to determine the top 10 Items is the Absolute Adjustment Value Summed across all PAR Locations. Absolute means both up and down adjustments are first stripped of their sign (+ or -) and then added together.

- Item Number
- Item Description
- Absolute Adjust Value Sum

The Top 10 Individual Items Needing the Most Improvement

The criteria used to determine the top 10 items is the Adjustment Value of the Item within a PAR Location.

- PAR Location
- Item Number
- Item Description
- Adjust Value

Compliance Ranking

The Compliance Ranking screen is displayed when you click on the **Rank** column for a PAR Location on the Compliance Summary screen. The screen shows each of the columns from the summary screen along with the ranking for the selected PAR Location in each category.

Use this information to see how a PAR Location measures up to other locations.

Selection Criteria

Cost Type - You can select to use "Item Cost" or "Patient Cost".

Report Period - Select the reporting period from the drop down list (will default to the reporting period selected on the Summary screen):

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

This table shows the values and ranking for PAR location during the selected time period. The report header information also tells you the total number of PAR Locations for which the ranking applies.

Dispense Qty - The quantity of all items dispensed at the location during the time period (that were properly recorded in the system).

Credit Qty - The quantity of all items credited at the location during the time period (that were properly recorded in the system).

Adjust Qty (Net) - The adjustments that were necessary to reconcile the inventory at this location ((and location ranking).

% Compliant - Compliance for the location and how the location ranks with all other locations. Perfect compliance is when no adjustments are necessary to reconcile the inventory. That would mean all dispenses and credits are being properly recorded in the system.

Issue Value - The value (based on the selected cost) of all items that were properly issued (dispensed).

Credit Value - The value (based on the selected cost) of all items that were properly credited.

Adjust Value - The value (based on the select cost) of all adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to good compliance.

Compliance Summary by Month

The Compliance Summary by Month screen is displayed when you click on the **Trend** column for a PAR Location on the Compliance Summary screen. To return to the Compliance Summary screen, click the **Previous** button at the top of the screen.

This drill-down graphically displays the trend of compliance activity over the last six months for the selected PAR Location. The blue line indicates the trending of the "% Compliant" while the gold line indicates the trending of the "% Dollars Captured".

Directly beneath the line graph is the raw data that is utilized in the line graph. The first column displays the month for which the data represents. The other columns match the columns on the Compliance Summary screen with the values in each column being relative to the corresponding month.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - You can select to use "Item Cost" or "Patient Cost".

PAR Location - Select a PAR Location (will default to the location selected on the Summary screen).

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

For each **Month** in the selected reporting period, the screen shows the information below for the selected PAR Location.

Dispense Qty - The quantity of all items dispensed at the location for the month (that were properly recorded in the system).

Credit Qty - The quantity of all items credited at the location for the month (that were properly recorded in the system).

Adjust Qty (Net) - The adjustments that were necessary to reconcile the inventory at this location ((and location ranking).

% Compliant - Compliance for the location. Perfect compliance is when no adjustments are necessary to reconcile the inventory. That would mean all dispenses and credits are being properly recorded in the system.

Issue Value - The value (based on the selected cost) of all items that were properly issued (dispensed) during the month.

Credit Value - The value (based on the selected cost) of all items that were properly credited during the month.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations during the month.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to good compliance.

Sorting Capabilities

Month is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels



Location Comparison - Use this button in the PAR Vision menu bar to compare compliance across multiple locations using the [Compliance by Month Comparison](#).

Compliance by Month Comparison

This screen lets you compare and graph monthly compliance across multiple locations. All of your locations are listed in a table along with the monthly compliance for the past six month. You can select which locations you want to chart in the graph.

This lets you analyze how each location is performing relative to other locations and quickly see (via the graph) which locations are improving at the best rate.

Selection Criteria

Chargeable Type - Select whether you want to see compliance by "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

PAR Location - All of your PAR Locations are displayed in the list. You can check the box next to the locations you want to graph.

Data Fields

PAR Location - The name of a PAR Location.

Months - Compliance totals for the prior six months for each PAR Location.

Graph - Check the locations you want to see on the graph. The compliance percentage for each month becomes a data point on the graph. Hover the mouse over the graph and then click **2D** or **3D** to see the graph in two dimensions or three dimensions.

Sorting Capabilities

PAR Location is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.



No matter what column and direction you choose for your sort, the **All Locations** line always remains at the top of the list.

Compliance Details

This screen is displayed when you click on a **PAR Location** on the Compliance Summary screen. You can click anywhere on the summary line for the PAR Location (other than Rank and Trend) to display this page. To return to the Compliance Summary screen, click the **Previous** button at the top of the screen.

The information displayed is the same as the summary screen broken down *for each item* at the location. This detail lets you determine if a problem at a location is universal or specific to a few items.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items). This selection is pre-set to the selection you made on the Summary screen.

Cost Type - You can select to use "Item Cost" or "Patient Cost".

PAR Location - Select a PAR Location (will default to the location selected on the Summary screen).

Report Period - Select the reporting period from the drop down list (will default to the reporting period selected on the Summary screen):

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Chargeable Indicator - Indicates whether the item is chargeable or non-chargeable.

Dispense Qty - The quantity of this item dispensed at the location during the time period (that were properly recorded in the system).

Credit Qty - The quantity of this item credited at the location during the time period (that were properly recorded in the system).

Adjust Qty (Net) - The adjustments that were necessary to reconcile the inventory for this item.

% Compliant - Compliance for this item at this location. Perfect compliance is when no adjustments are necessary to reconcile the inventory. That would mean all dispenses and credits are being properly recorded in the system.

Issue Value - The value (based on the selected cost) of this item that was properly issued (dispensed).

Credit Value - The value (based on the selected cost) of this item that was properly credited.

Adjust Value - The value (based on the selected cost) of the adjustments to the item inventory.

% Dollars Captured - The percentage of the value of this item that was correctly captured by the system due to good compliance.

Sorting Capabilities

% Compliant is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

[Transaction History Details for Compliance](#) (for the selected item) is displayed if you click on an item.

[Compliance Adjustments Summary](#) can be displayed from the Transaction History Details screen.

Transaction History Details for Compliance

This screen shows the detail transactions that are used to generate the compliance statistics for a selected item.

You can display this screen by clicking on an item on the [Compliance Detail](#) screen. From this screen you can drill down further the [Adjustments Summary](#) screen to analyze the adjustment transactions that negatively affect compliance.

Selection Criteria

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

Date and Time - The date and time of the transaction.

Transaction - The type of transaction.

Qty - The quantity for this transaction.

New QOH - How the transaction affected the quantity on hand for the item.

Sorting Capabilities

Transaction Date and Time are the default sort for this screen.

Re-sorting of this table is not supported since the **New QOH** value is only meaningful when the list of transactions is displayed in date/time sequence.

Drill-Down Level

[Compliance Adjustments Summary](#) is displayed by when you click the  icon in the top right corner of the screen.

Compliance Adjustments Summary

This screen is displayed when you click the  icon in the top right section of the Compliance Transactions screen.

Guidelines for interpreting this information:

- High incidence of up adjustments - May indicate items not received into PAR Excellence when delivered to the location.
- High incidence of down adjustments - May indicate items not touched/scanned as dispensed.
- High incidence of up and down adjustments - May indicate excessive counting errors.

Selection Criteria

The time period used on this screen is taken from the Compliance Transactions screen.

Data Fields

Instances of Upward Adjustments - The number of times during the reporting period that and upward adjustment was done.

Total Qty for Upward Adjustments - The total quantity of all upward adjustments.

Instances of Downward Adjustments - The number of times during the reporting period that and downward adjustment was done.

Total Qty for Downward Adjustments - The total quantity of all downward adjustments.

Compliance Summary - Ad Hoc

This report provides the same information as the [Compliance Summary](#) report but it allows you to select a custom date range. The standard Compliance Summary report uses summarized data for pre-determined periods over the past six months but this report lets you run the Compliance Summary for any date range you choose.

Since the report does not use pre-calculated values it will take longer to run this report than the standard report.

Selection Criteria

Chargeable Type - Select whether you want to see "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - You can select to use "Item Cost" or "Patient Cost".

Start Date - Enter the date where the Compliance Analysis will start.

End Date - Enter the ending date for the Compliance Analysis.

Update Output - Click this button after you have made all your sections to begin running the report.

Data Fields

PAR Location - The PAR Location.

Dispense Qty - The quantity of all items dispensed at the location during the time period (that were properly recorded in the system).

Credit Qty - The quantity of all items credited at the location during the time period (that were properly recorded in the system).

Adjust Qty (Net) - The adjustments that were necessary to reconcile the inventory at this location ((and location ranking).

% Compliant - Compliance for the location. Perfect compliance is when no adjustments are necessary to reconcile the inventory. That would mean all dispenses and credits are being properly recorded in the system.

Issue Value - The value (based on the selected cost) of all items that were properly issued (dispensed).

Credit Value - The value (based on the selected cost) of all items that were properly credited.

Adjust Value - The value (based on the select cost) of the adjustments at this PAR Locations.

% Dollars Captured - The percentage of the total value at this PAR Location that was correctly captured by the system due to good compliance.

Sorting Capabilities

PAR Location is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Compliance By Group

If you have defined PAR Location Groups, this screen summarizes the compliance statistics for the PAR Locations in the Group(s). Use this report to get a snapshot of how the various groups are performing. You can then drill-down to the Compliance Summary where you can analyze the detail Compliance information for any PAR Location or Group.

Selection Criteria

Chargeable Type - Select whether you want the summary to include "Chargeable" items, "Non-Chargeable" items or "Both" (all items).

Cost Type - For the "Dollars Captured" summary, you can use "Item Cost" or "Patient Cost".

Report Period - Select the reporting period from the drop down list:

- Last 30 days
- Select a specific month (out of the past 6 months)
- The last 6 months combined

Data Fields

Group - The name of a PAR Location Group.

Locations with % Compliance - Summarizes the number of locations in the group based on the compliance percentage at the location during the Report Period selected.

- **>95%** - the number of locations in the Group with compliance greater than 95 percent.
- **85%-95%** - the number of locations in the Group with compliance between 85 percent and than 95 percent.
- **75%-85%** - the number of locations in the Group with compliance between 75 percent and than 75 percent.
- **<75%** - the number of locations in the Group with compliance less than 75 percent.
- **Locations with % Dollars Captured** - Summarizes the number of locations in the group based on the percentage of costs that were properly captured (i.e., recorded in the system) as a result of good compliance.
- **>95%** - the number of locations in the Group with greater than 95 percent of costs properly recorded in the system.
- **85%-95%** - the number of locations in the Group with between 85 percent and than 95 percent of costs properly recorded in the system.
- **75%-85%** - the number of locations in the Group with between 75 percent and than 75 percent of costs properly recorded in the system.
- **<75%** - the number of locations in the Group with less than 75 percent of costs properly recorded in the system.



Dollars Captured percentages can differ from Compliance percentages when poor compliance involves a large number of high cost items (or low cost items). For example, if

the Compliance percent is high (good) but the items that were not recorded were expensive items, then the Dollars Captured percent could be low (bad).

Sorting Capabilities

Group Name is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on any Group to see the [Compliance Summary](#) screen where you can continue your analysis with more detailed data.

PAR Charge Compliance

Overview

This function is used to analyze the activities between a Parent (inventory) location and its associated Child (PAR Charge) locations. The PAR Charge functionality lets you manage the quantity on hand from one location (the parent) and do patient charging from the PAR Charge location (the child).

The inventory is dispensed (or issued) from the parent location to the department and the same inventory is issued to the patient from the child location. Perfect compliance, therefore, is when the number of departmental issues from the parent is the same as the number of patient issues from the child.

Selection Criteria

Parent PAR Location - The location at which the inventory levels is being maintained.

Start Date and Time - The starting date and time for the transactions to be analyzed.

End Date and Time - The starting date and time for the transactions to be analyzed.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

After clicking the Update Output button, the system will analyze the compliance between the Parent location and the PAR Charge location(s) and display the following results.

Summary

Issues to Department - The number of times an item was issued to the department at the Parent location.

Net PAR Charges - The number of times an item was issued to a patient from a child (PAR Charge) location.

Compliance - The percentage of time the PAR Charge process was followed properly. Perfect compliance means that every department issue from the Parent location became a patient issue from the child location.

Details

PAR Charge (child) PAR Location - The name of one of the child locations associated to the selected Parent locations.

Net PAR Charges - The number of patient issues done at this location.

Drill-Down Levels

If you click anywhere in the **Details** section of the screen, the system will display the [PAR Charge Compliance Details](#) for all items at the location.

Click the **Setup PAR Charge** button to run the [PAR Charge Setup](#) utility that lets you define the Parent/Child relationship between the locations.

PAR Charge Compliance Details

Overview

This screen displays the detailed compliance data for each item at the PAR location that had PAR Charge activity.

Selection Criteria

Parent PAR Location - The location at which the inventory levels is being maintained.

Start Date and Time - The starting date and time for the transactions to be analyzed.

End Date and Time - The starting date and time for the transactions to be analyzed.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

After clicking the Update Output button, the system will display the detailed compliance data for each item with activity during the selected date range.

Item Number - An item with PAR Charge activity during the selected date range for the selected Parent location.

Item Description - The description of the item.

item Cost - The item cost for the item.

Charge Number -

Patient Cost - The patient charge number for the item.

Compliance - The PAR Charge compliance for this item. PAR Charge compliance measures the percentage of time a department issue from the Parent location becomes a patient issue from a child location.

Issued to Dept. (Parent) - The number of times this item was issued to the department from the Parent locations.

PAR Charge Qty (Total) - The total number of patient issues for all PAR Charge (child) locations.

PAR Charge Qty f/ ? - Each PAR Charge (child) location is listed with the number of patient issue at each location.

Sorting Capabilities

The primary default sort field is **Compliance** percentage in ascending order (lowest compliance first). Within compliance, the data is sorted by the number of **Issues to the Department** at the parent location in descending order (most issues first).

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Charge Setup

Overview

Use this utility to define the Parent/Child relationship for PAR Charge Compliance analysis. The Parent location is the location where the inventory quantity on hand levels are being managed. Items are issued from the parent location to the department. The Child (PAR Charge) locations are where the items are being issued to the patients.

Selection Criteria

Parent - Select the location that represents the PAR Charge parent. This location issues items to the department and the quantity on hand is maintained at this location.

Children - Select the location(s) that represent the PAR Charge children. These locations issue items to the patient.

Procedures

To create the Parent/Child relationships, follow the procedures below.

1. Using the selection list under the Parent heading (- Select Parent -), select the location that will be the parent location.
2. Next, using the selection list under the Children heading (- Select Child -), select one of the child locations for this parent.
3. The utility will add the location to the list of children and present another Select Child list.
4. Select another child location for this parent (if applicable) and the new child will be added to the list.
5. Continue until all children for this Parent have been added to the list.
6. To set up another set of Parent/Child locations, select a Parent location using the Select Parent list beneath the separator line.
7. Select the Children for the new parent as described above.

To delete a Child location for a Parent:

1. Click the **Delete** button next to the child location to be deleted.

2. If you delete all children for a Parent, the Parent location is also removed.

To delete an entire set of Parent/Child locations:

1. Click the **Delete** button to the left of the Parent location.
2. As noted above, you could also delete each child location individually until there are no more children for the Parent.

PAR Bin Compliance

Overview

PAR Bins compliance is a measure of the number of patient (or department) charges for an item versus the usage of that item in a PAR Bin location. Only chargeable items at the location are included in the report.

For the chargeable items at the location, for each item dispensed there should be a corresponding patient (or department) charge. Perfect compliance, therefore, is achieved when the number of charges is equal to the item usage. Although compliance for all items is important, you should pay particular attention to the compliance for any high cost items stored at the location. You can sort the report by item cost (or patient cost) by clicking on the column heading.

Selection Criteria

PAR Location - Select the location you want to analyze. The list only contains locations that use PAR Bins.

Start Date and Time - The starting date and time for the transactions to be analyzed.

End Date and Time - The starting date and time for the transactions to be analyzed.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.



You can use the **Start Time** and **End Time** fields to analyze compliance during various intervals in a day. For example, you can see how compliance at night compares to compliance during the day time on a particular day.

Data Fields

After clicking the Update Output button, the system will analyze the compliance between item usage and charges and display the following results.

Summary

PAR Bin Item Usages - The total number of chargeable items dispensed from the location in the selected date range.

PAR Bin Item Charges - The total number of charges recorded for the location in the selected date range.

Compliance - The percentage of time a charge was recorded when an item was dispensed.

Details

Item Number - The PAR Excellence item number.

Item Description - The description of the item.

Item Cost - The cost of the item to the hospital.

Charge Number - The charge number for the item.

Patient Cost - How much you charge the patient for the item.

Usage - The quantity of this item that was dispensed during the selected date range.

Charges - The number of patient (or department) charges that were recorded for this item during the selected date range.

Compliance - The percentage of dispensed items that were also charged.

Sorting Capabilities

The default sort field is **Compliance** percentage in ascending order (lowest compliance first). You can easily re-sort the report by any column of the report by clicking on the column heading. For example, if you are not charging for items, then the report might be much more useful if it were sorted by **Usage**. If you are charging for items, you may want to sort by **Item Cost** so you can easily see the compliance for your high cost items.

See [Sorting](#) for more information on sorting PAR Vision lists.

Web Requisitions

Web Requisitions

The topics in this section describe the Web Requisition function in the PAR Vision system. You can access these functions using the links in the Web Req section of the PAR Vision Menu (on the left side of the dashboard).

The Web Requisition function includes:

[Requisition Items](#)

[Order Details](#)

[Item Order History Details](#)

[Request Items from MM](#)

[Edit Open MM Requests](#)

[Completed MM Requests](#)

[Fill MM Requests](#)

[Review/Reprint Filled MM Requests](#)

Requisition Items

This function lets you requisition certain blue-label items for a PAR Location. Once these items have requisitioned you can use the PAR Excellence system to build an order and then receive the order into inventory.

Not all blue-label items can be requisitioned using this function. Those items that have an iButton (or bar code) assigned must be requisitioned using the normal requisitioning function. Normal requisitioning is done using the RRR board and involves touching iButtons for items and quantities with the touch probe.

If you have blue-label items that do not have an iButton (or bar code) assigned, it is not possible to requisition the items using the normal process. That's when this function is used.

Procedures

1. Select a PAR Location.
2. The system displays all blue-label items at the location that do not have an iButton (or bar code) assigned.
3. Enter the quantity of an item to be requisitioned in the box in the Req. Qty column on the screen.
4. After all quantities have been entered, click the Submit Requisition button.
5. The system will display the Posted Requisitions screen with a re-cap of what has been requisitioned.
6. The next time orders are built for this PAR Location the items that were requisitioned will be ordered.

Selection Criteria

PAR Location - The location for which you want to requisition items.

Apply Filter > - Click this button after you have entered a value in one, or more, of the fields described below to show only the items at the location that match the filter criteria.

Vendor Number - Enter all or part of a Manufacturer's/Vendor number of the item(s) to be requisitioned.

Item Number - Enter all or part of a PAR Excellence item number of the item(s) to be requisitioned.

Item Description - Enter all or part of an item description for the item(s) to be requisitioned.



After clicking the **Apply Filter >** button, the screen is re-displayed with the items matching the filter on top and separated from the remaining items with a blue line. You can still requisition any item on the screen (including those below the blue line that did not match the filter).

Data Fields

On Order - The current quantity on order for this item. This information is important because you may already have enough of the item on order and you need not requisition more.

Req. Qty - A data entry field in which you enter the quantity of the item to be requisitioned.

Unit Rep. - The unit of replenishment for the item. This is the unit of measure that will be requisitioned.

Vendor Number - The Manufacturer's/Vendor Number for the item.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Req. Count - The number of time this item has been requisitioned in the past. This number is used as the default primary sort field so the items that you requisition most often are at the top of the list. This is helpful because the items you are most likely to requisition will be easy to find.

Replenishment Source - The replenishment source for the item. This information could be useful if you know how long it takes a particular replenishment source to fill an order. You may want to requisition an item before it is actually needed if you know the replenishment source is slow to fill orders.

Sorting Capabilities

Req. Count (in descending order) is the default sort field for this list. This is helpful because the items you are most likely to requisition will be easy to find. But, remember that you can click on any column to re-sort the list by the data in that column.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill Down Levels

Click on an item in the list to see the [Item Order History Details](#) screen for that item.

From the Item Order History Details screen you can drill down further to see the [Order Details](#) for an order.

Item Order History Details

This screen is displayed when you drill down on an item on the [Requisition Items](#) screen. The screen shows a list of all orders (that have not been purged from the system) for this item. The orders are listed in date sequence so you can see the most recent order first.

Data Fields

Item Number, Description and PAR Location - This information is displayed in a message above the table of orders.

Date - The date the order was built. If the order has not yet been built, this field is blank.

Qty - The quantity of this item that is (or was) contained on the order.

Order Status - The status of the order.

- Pending Order Build - The item has been requisitioned but the order has not yet been built.
- Built - The order has been built but no receiving activity has taken place.
- Receiving - The order has been partially received.
- Backordered - Everything on the order has been backordered.
- Closed - The order has been completely received.

Order Name - The name that was given to the order, or if no name was specified, the order number.

Replenishment Source - The source that will (or did) fill the order.

Sorting Capabilities

Date (most recent first) is the default sort field for this list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill Down Levels

Click on an order in the list to see the [Order Details](#).

Order Details

This screen is displayed when you drill down on an order on the [Item Order History Details](#) screen. The screen shows all items on the order along with information about the quantity still on order for the item the quantity backordered and the quantity received.

Data Fields

Order Name, Replenishment Source, Order Date and PAR Location - This information is displayed in the message above the order items table.

Current on order - The quantity for the item that has not yet been received and is still on order.

Unit Rep. - The unit of measure of the item to be received (or already received).

Back Ordered - The quantity of the item that is on backorder.

Received - The quantity of the item that has already been received on this order.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Sorting Capabilities

Current on order (in descending sequence) is the default sort field for this list. This places items that have not yet been received at the top of the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Request Items

Overview

This utility lets you request items from a supply location to be dispensed to a patient. Normally the items that are requested using this function will be low volume specialty items that are not stocked at the nursing location(s). It can also be used to request an item that is normally stocked at the nursing location but is temporarily out of stock, although that will be very infrequent.

When a request is submitted it will be forwarded to the Materials Management staff in the selected supply room and they will pull the items from the supply room and deliver them to the nursing location. The system will automatically handle the patient charging if appropriate.

This is one of five functions that make up the complete requisitioning capability in PAR Vision.

Request Items - this function lets a Caregiver request supplies from a supply room in the hospital.

Edit Open Requests - this function allows the Caregiver to remove items from a request to the supply room if it has not yet been filled.

Completed Requests - after the request has been filled it will appear on this screen and the interested people can review the requests to see what is being requested and how long it takes to fill a request.

Fill Requests - this function is used by the Materials Management people in the supply room to the requests from the nursing stations and to fill the requests.

Review/Reprint Filled Requests - after a request has been filled it will appear on the screen and the Materials Management people in the supply room can review the requests that have been filled and reprint the pick/delivery ticket if necessary.

For step-by-step instructions on how to submit a request for items, see the **Procedures** section below.

Selection Criteria

Item Selection

Hospital - Select the supply room from which items will be requested. If there is only one supply room this value will be pre-selected.

Item Number - Enter the PAR Excellence item number for the desired item. As you type the item number the list will automatically be filtered. When you see the desired item in the list, click on the item to select it.

Item Description - If you do not know the item number but you know some, or all, of the item description, you can enter it in this field. As you type the list will be filtered to include only the items matching the description you type. When you see the desired item in the list, click on the item to select it.

Vendor/Mfg Number - In addition to Item Number or Description you can also select an item using the Vendor/Mfg Number. Begin typing the number to filter the list to the appropriate items. When you see the desired item in the list, click on the item to select it.

Quantity - Enter the quantity to the item to be dispensed to the patient.

Patient Selection

Nursing Location - Select the location where the patient is located.

Patient Room - Enter the room number for the patient (that will receive the items). As you type the room number the list will automatically be filtered. When you see the desired patient in the list, click on the patient to select him/her.

Patient Name - Optionally, you can select the patient by typing the patient name. As you type the name the list will be filtered to include only the patients matching the name you type. When you see the desired patient in the list, click on the patient to select him/her.

Clinic Number - In addition to the Patient Room or Patient Name you can also select a patient using the clinic number assigned to the patient. As you type the clinic number the list will automatically be filtered. When you see the desired patient in the list, click on the patient to select him/her.

*After all the above fields are completed, click the **Add Item** button to put the item on the request.*

Data Fields

Delete - Click this button to remove an item from the request prior to submitting.

Hospital - This field displays the supply location that was selected to fulfill the request.

Item - The item number and description requested from the Supply Location.

Qty - This field displays the quantity of the item requested.

UISS - This is the unit of measure related to the quantity in the previous field.

Nursing Location - The location for which the item is being requested.

Patient Number - The Clinic Number for the patient for which the item is being requested.

Patient Name - The Name of the patient for which the item is being requested.

*After adding all the items you want to request, click the **Submit Request** button to send the request to Materials Management.*

Procedures

To request an item from the supply location, follow the steps below:

1. Select the **Hospital** where you want to request supplies. If there is only one supply location available, it will be automatically selected for you.
2. You can select an item using either the **Item Number**, the **Item Description** or the **Vendor/Mfg Number**. This flexibility is provided so you can find an item using whatever information you have immediately available to you.
3. Click into one of the three item selection fields and begin typing the item information. You will notice that the list of items is automatically filtered based on the information you have typed so far. When you see your item in the list, you can stop typing and select the item by clicking on the entry in the list.
4. Enter the **Quantity** of the item you would like to request.
5. Select the **Nursing Location** where the selected item should be delivered.
6. Select the **Patient** for whom the item is being requested. You can select the patient using either the **Patient Room**, **Patient Name**, or **Clinic Number**. Click into one of the three patient selection boxes and begin typing the information. When you see the desired patient in the list, you can stop typing and select the patient by clicking on the entry in the list.
7. Click the **Add Item** button to put this item on the request.
8. If you want to request another item for this patient or another patient, repeat steps 1 through 7 for the new item and patient.
9. After all items are on the request, click the **Submit Request** button. The system will reply with a notice that *the request was successfully posted*.

If you enter an item on the request in error (either the wrong item, the wrong patient or the wrong quantity), you can click the **Delete** button in the list to delete that item from the request. You can now enter the correct information on the request using the steps above.

Edit Open Requests

Overview

This function lets the Caregiver cancel a request that was made using PAR Vision but has not been fill by the Materials Management staff in the supply room. You can also use this function to simply review the open requests for a location.

For step-by-step instructions on how to cancel a request, see the **Procedures** section below.

Selection Criteria

Hospital - Select the supply location from which items were requested.

Nursing Location - Select the nursing location where the patient is located.

*After making the selections above, click the **Refresh Now** button.*

Data Fields

Delete - Click this button to remove an item from the request prior to submitting.

Hospital - This field displays the supply location that was selected to fulfill the request.

Item - The item number and description requested from the Supply Location.

Qty - This field displays the quantity of the item requested.

UISS - This is the unit of measure related to the quantity in the previous field.

Nursing Location - The location for which the item is being requested.

Patient - The Clinic Number and Patient Name for which the item is being requested.

Requested Date - The date the request was submitted.

Requested Time - The time the request was submitted.

Procedures

To cancel an item requested from the supply room, follow the steps below:

1. Select the supply room from which you requested the item from the **Hospital** list.
2. Select the **Nursing Location** where the item will be delivered.
3. Locate the item that is no longer needed in the list of open requests.
4. Click the **Delete** button for that item..

The request for that item will be deleted. If you want to cancel additional items, repeat the process.

Completed Requests

Overview

This function lets the Caregiver or Nurse Manager review the completed requests that have been made using PAR Vision. Using this function you can see which of your requests have been completed for a specified date range and you can see how long it took the Materials staff to complete various requests.

For step-by-step instructions on how to review completed requests, see the Procedures section below.

Selection Criteria

Hospital - Select the supply location from which the items were requested.

Nursing Location - Select the location where the patient is located.

Start - Enter or select the starting date for the transactions you want to review. This date refers to the date you made the request.

End - Enter or select the ending date for the transactions you want to review. This date refers to the date you made the request.

After making the selections above, click the **Refresh Now** button.

Data Fields

Hospital - This field displays the supply location that was selected to fulfill the request.

Filled From - This is the location where the items were actually dispensed. Most of the time this will be the supply room, however, there are occasions when the requested item is not stocked in the supply room so the inventory is pulled from another location.

Item - The item number and description requested from the Supply Location.

Qty - This field displays the quantity of the item requested.

UISS - This is the unit of measure related to the quantity in the previous field.

Nursing Location - The location for which the item was requested.

Patient - The Clinic Number and Patient Name for which the item was requested.

Requested Date - The date the request was submitted.

Requested Time - The time the request was submitted.

Completed Date - The date the request was filled by the Materials staff.

Completed Time - The time the request was filled by the Materials staff.

Procedures

To review completed requests, follow the steps below:

1. Select the supply location from which you requested the items from the **Hospital** list.
2. Select the **Nursing Location** where the items were delivered.
3. The **Start** and **End** dates default to the last seven days. If you want to see requests from a different date range, enter a start date and end date (mm/dd/yy). You can also click on the calendar icon and select a date from the calendar pop-up.
4. Click the **Refresh Now** button to get the list of completed requests.

Fill Requests

Overview

This is the main function used by the Materials staff in the supply room to fill web requisition requests from the Nursing locations. When a request is made from a nursing location, the request will automatically appear on this screen in the supply room. The Materials staff in the supply room monitoring the function will see the request and dispense and deliver the appropriate supplies.

Most of the items requested will be dispensed from the inventory in the supply room. Occasionally, however, a requested item will not be stocked in the supply room or the supply room could be out of stock. In those cases, the Fill MM Requests function provides the flexibility to locate an item at another PAR Location and request that the item be dispensed from that location.

When a request is filled a pick ticket will be printed which can be put with the supplies to help insure delivery to the correct Nursing location.

For step-by-step instructions on how to fill a request, see the **Procedures** section below.

Selection Criteria

Hospital - Select the supply location from which items will be requested.

Nursing Location - Select the location where the patient is located.

*After making your selections, click the **Refresh Now** button to display the requests to be filled.*

Data Fields

Fill - Click this button to fill the item requested on this line.

Fill From - This is the location that will dispense the item. The default is to fill the request from the supply room where it was requested. Some items, however, are not stocked in the supply room, or the supply room may be out of stock. In those cases, you can select a location from the list to fill the request. The list contains the current QOH at each location to assist in making your selection.

Item - The item number and description requested from the Supply Location.

Qty - The quantity of the item requested. You can change this value to dispense less (or more) than was requested depending on the stock level in the supply room.

UISS - This is the unit of measure related to the quantity in the previous field.

Nursing Location - The location that requested the item.

Patient - The Clinic Number and Patient Name for which the item is being requested.

Requested Date - The date the Nursing location entered the request.

Requested Time - The time that the request was made.

Procedures

To fill a request for an item, follow the steps below:

1. Select the supply location where the request was submitted from the **Hospital** list. If there is only one supply location available, it will be automatically selected for you.
2. Select the **Nursing Location** that made the request. The default is to display all open requests from all nursing locations.
3. Look at the **Fill From** value. To fill the request from a location other than the supply room, select a location from the list that has enough QOH available.
4. Look at the **Qty** value. If you want to dispense a quantity different from what was requested, change the value to the appropriate quantity.
5. Click the **Fill** button at the beginning of the line to fill the request.
6. Retrieve the pick list printout from the printer and the items from the supply room (or the location you selected to fill the request) and deliver the items to the Nursing location.

Review/Reprint Filled Requests

Overview

This function can be used by the Materials staff in the supply room to review requests that have already been completed. The function also includes a Reprint button that can be used to reprint the pick list for the item in case the printout got lost or damaged.

For step-by-step instructions on how to review completed requests, see the **Procedures** section below.

Selection Criteria

Hospital - Select the supply location from which items were requested.

Nursing Location - Select the location where the patient is located.

Start - Enter or select the starting date for the transactions you want to review. This date refers to the date you made the request.

End - Enter or select the ending date for the transactions you want to review. This date refers to the date you made the request.

*After making the selections above, click the **Refresh Now** button.*

Data Fields

Reprint - Click this button to reprint the pick list for this item.

Hospital - This field displays the supply location that was selected to fulfill the request.

Filled From - This is the location where the items were actually dispensed. Most of the time this will be the supply room, however, there are occasions when the requested item is not stocked in the supply room so the inventory is pulled from another location.

Item - The item number and description requested from the Supply Location.

Qty - This field displays the quantity of the item that was filled.

UISS - This is the unit of measure related to the quantity in the previous field.

Nursing Location - The location for which the item was requested.

Patient - The Clinic Number and Patient Name for which the item was requested.

Requested Date - The date the request was submitted.

Requested Time - The time the request was submitted.

Completed Date - The date the request was filled by the Materials staff.

Completed Time - The time the request was filled by the Materials staff.

Procedures

To review completed requests, follow the steps below:

1. Select the supply location from which the item was requested from the **Hospital** list.
2. Select the **Nursing Location** where the items were delivered.
3. The **Start** and **End** dates default to the last seven days. If you want to see requests from a different date range, enter a start date and end date (mm/dd/yy). You can also click on the calendar icon and select a date from the calendar pop-up.
4. Click the **Refresh Now** button to get the list of completed requests.
5. To reprint the pick list for an item, click the **Reprint** button at the beginning of the line.

Request Items Setup

Overview

This utility is used to define the notes that will be displayed on the Request Items screen and to setup the relationship between the Nursing locations and the Hospital where they are located. This relationship is used to determine which nursing locations are displayed depending on the Hospital selection that is made.

The Hospital to Nursing Location relationship is a Parent/Child relationship. Each Hospital (or supply room) can have multiple Nursing locations associated to it. Refer to the procedures below for step by step procedures on setting up the relationship.

Selection Criteria

Request Items Delivery Notice

Use this section of the screen to create up to four lines of text that will appear on the top right hand side of the request Items screen. This text will typically describe the length of time it will take for a normal delivery, how to contact the supply room clerk, etc. Type the text you want to appear on the screen. Each line of text will be saved when you exit the field.

Request Items Location Mapping

Use this section of the screen is used to create the Parent/Child relationship between the Hospital(s) and the Nursing locations at the hospital.

Parent - Select the location that represents the supply room at the Hospital.

Children - Select the Nursing location(s) or groups at this hospital. These are the locations (or groups of locations) where the patients are located.

Procedures

To create the Parent/Child relationships, follow the procedures below.

1. Using the selection list under the **Parent** heading (- *Select Parent* -), select the location that will be the parent location.
2. Next, using the selection list under the **Children** heading (- *Select Child* -), select one of the child locations for this parent.
3. The utility will add the location to the list of children and present another *Select Child* list.
4. Select another child location for this parent (if applicable) and the new child will be added to the list.
5. Continue until all children for this Parent have been added to the list.
6. To set up another set of Parent/Child locations, select a **Parent** location using the *Select Parent* list beneath the separator line.
7. Select the **Children** for the new parent as described above.

To delete a Child location for a Parent:

1. Click the **Delete** button next to the child location to be deleted.
2. If you delete all children for a Parent, the Parent location is also removed.
3. To delete an entire set of Parent/Child locations:
4. Click the **Delete** button to the left of the Parent location.
5. As noted above, you could also delete each child location individually until there are no more children for the Parent.

Fill Requested Items Setup

Overview

This utility is used setup the relationship between the locations that can be used to fill a request and the Hospital where they are located. This relationship is used to determine which locations are displayed in the "Fill From" list depending on the Hospital where the request was submitted.

The Hospital to "Fill From" location relationship is a Parent/Child relationship. Each Hospital (or supply room) can have multiple "Fill From" locations associated to it. Refer to the procedures below for step by step procedures on setting up the relationship.

Selection Criteria

Use this section of the screen is used to create the Parent/Child relationship between the Hospital(s) and the "Fill From" locations at the hospital.

Parent - Select the location that represents the supply room at the Hospital.

Children - Select the location(s) at this hospital. These are the PAR locations at this hospital where inventory items are stocked.

Procedures

To create the Parent/Child relationships, follow the procedures below.

1. Using the selection list under the **Parent** heading (- *Select Parent* -), select the location that will be the parent location.
2. Next, using the selection list under the **Children** heading (- *Select Child* -), select one of the child locations for this parent.
3. The utility will add the location to the list of children and present another *Select Child* list.
4. Select another child location for this parent (if applicable) and the new child will be added to the list.
5. Continue until all children for this Parent have been added to the list.
6. To set up another set of Parent/Child locations, select a **Parent** location using the *Select Parent* list beneath the separator line.
7. Select the **Children** for the new parent as described above.

To delete a Child location for a Parent:

1. Click the **Delete** button next to the child location to be deleted.
2. If you delete all children for a Parent, the Parent location is also removed.

To delete an entire set of Parent/Child locations:

1. Click the **Delete** button to the left of the Parent location.
2. As noted above, you could also delete each child location individually until there are no more children for the Parent.

Graphical Analysis

Graphical Analysis

These reports can be used to analyze the physical location of the inventory at a PAR Location. The reports will show you the actual arrangement of the shelves at the location along with compliance, cost and usage information for each item in each shelf location.

You can access these reports from the Data Analysis section of the PAR Vision menu.

[Graphical PAR Location Analysis](#)

[Set Walls to PAR Location Bins](#)

Graphical PAR Location Analysis

This report displays physical shelf locations at a PAR Location with detailed information about the item stocked in each shelf location. In order for the information on this report to be completely meaningful you must assign a shelf location for each item at the PAR Location. Shelf locations are assigned using the PAR Location Items utility in the main PAR Excellence system. Your PAR Excellence Account Manager can work with you to develop a logical location naming scheme.

The system lets you further define the physical setup of the location by assigning the bins to a wall at the location. So if you have bins mounted on different walls at the location, you can tell the system which bins are on which walls to make the information provided in the display even more meaningful.

Once you have all your items assigned to a shelf location and walls (if applicable), this function will provide valuable information about the physical location of the items with the lowest compliance, the highest usage and the highest cost. You can use this information to rearrange items at the location to save time for the Caregivers or increase compliance on the highest cost items.

For example, by physically locating a high cost item (with low compliance) close to the Patient Display Board, you may increase the compliance for that item. Also, by placing high usage items near the Patient Display Board you will make it easier for the Caregiver to dispense the item and save him/her time searching for the item.

The color coded graphical bins tell you immediately what items are low compliance, high usage and high cost.

Selection Criteria

PAR Location - Select the PAR Location to be analyzed.

Color code by - Select the method to use for color coding the graphical bins on the display.

- **Compliance** - The bins will be color coded in shades of **blue** with the items with the highest compliance percentage being dark blue. As the compliance percentage decreases, the shade of blue gets lighter and items with 0% compliance are white.

- **Cost** - The bins will be color coded in shades of **green** with the items with the highest cost being dark green. As the cost decreases, the shade of green gets lighter and items with \$0 cost are white.
- **Usage** - The bins will be color coded in shades of **purple** with the items with the highest usage being dark purple. As the usage decreases, the shade of purple gets lighter and items with no usage are white.

Graphical Bins - Move the cursor on top of one of the graphical bins to display the information about the item at that shelf location. Move through the bins to see the item information at each location.

To freeze the information on an item, click the shelf location. The "push pin"  will be inserted so the item information does not change as you move around the screen.

To release the "push pin"  click again on any shelf location.

Data Fields

When you hover the cursor over a graphical bin (or shelf) information about the item at that shelf location is displayed in the box on the left.

Item Info

Item No. - The PAR Excellence item number of the item at the shelf location.

Item Description - The item description.

Vendor/Mfg No. - The vendor or manufacturer's item number for the item.

PAR Level - The PAR Level for the item at this PAR Location.

QOH - The current quantity on hand for the item at this location.

Analysis

Item Type - The item type. White, Blue or PAR Bin.

Compliance - The compliance percentage for this item at this PAR Location.

ADU - the average daily usage for the item.

Cost - The item cost.

Other

Shelf Loc. - The name assigned to this shelf location. Shelf locations should be logical names that represent the position of each shelf in relation to other shelves at the location. If you use a logical shelf naming scheme, the information on this screen is much more meaningful.

Bin Size - This applies to PAR Bin items only and it represents the size of the scale used to hold the bin at this location.

Sorting Capabilities

Shelf Location is the default sort sequence for this screen. In addition, if your shelf locations are named logically to represent the physical sequence of the shelves, the display of the graphical bins will be organized to reflect that sequence. For example, if your shelf naming convention places a letter at the beginning of each shelf location, all the shelves that begin with A will be in the top row of the display. Then the B shelves, etc.

You can sort the display by any field in the information box on the left by clicking on the field description. For example, to sort by compliance percentage, click on the work **Compliance**.



All sort sequences (other than shelf location) will place the graphical bins in a square pattern in sequence by the selected sort field left-to-right, top-to-bottom.

Drill-Down Levels

Click on the **Set Walls** button in the Shelf Loc. field to [Set Walls to PAR Location Bins](#). The Set Walls button is only available when the display is sorted by shelf location.

Set Walls to PAR Location Bins

Overview

This utility lets you identify the wall at the location where a row of bins is physically located. There are several benefits to defining the setup of the location at this level. For example, if all the low compliance items are on a particular wall, you would be well served to determine the reason why. Maybe the Patient Display Board is located too far away from this wall.

Another use of this information could be in locating an item. If you have shelf locations assigned for all items and have further identified the wall on which the shelf is located, you should be able to pinpoint the exact physical location of any item at the PAR Location. Use the Sorting Capabilities on the screen to sort the items by description or Vendor/Manufacturers number. Then locate the time on the screen and the system will tell you the exact wall and shelf location at which it is stocked.

The term "wall" is used loosely in this function. A wall does not need to be one of the four walls at the location. You could also use a "wall" to identify a cart or table on which items are stocked at the location.

Selection Criteria

PAR Location - Select the PAR Location where you want to set up the walls.

Data Fields

Wall - Select the PAR Location where you want to set up the walls.

Bin - The wall location defined for the currently selected item.

Item No. - The PAR Excellence item number for the currently selected item.

Item Description - The description of the currently selected item.

Vendor No. - The vendor or manufacturer's number for the currently selected item.

Graphical Bins - The items at this PAR Location organized by shelf location. You can move the cursor on top of one of the graphical bins to display the information about the item at that shelf location. Move through the bins to see the item information at each location.

To freeze the information on an item, click the shelf location. The "push pin"  will be inserted so the item information does not change as you move around the screen.

To release the "push pin"  click again on any shelf location.

Procedures

When the screen is initially displayed (before any walls have been defined), the items will be arranged in rows as defined in the Shelf Location. Each row will be preceded by a button names **New Wall**.

Follow the procedure outlined below to define the walls at the PAR Location.

1. Click on the first **New Wall** button. You will notice that the button changes to **Clear Wall** and all the rows beneath this row become slightly indented.
2. Find the row of items where the next wall begins and click the **New Wall** button. The rows above the selected row are all now defined to be on Wall 1 and you are now defining the rows that are on the second wall.
3. Again, find the row of items where the third wall begins and click the **New Wall** button. Now you have defined Wall 1 and Wall 2 and you are defining the third wall.
4. Continue until all walls have been defined.

To clear a wall (and put all items on that wall on the wall defined above it), click the **Clear Wall** button.

Once all your walls are defined, you can click the **Previous page** button to return to the [Graphical PAR Location Analysis](#) screen. You will notice that the display is now grouped by the walls you defined with alternating colors for each wall.

PAR Levels

PAR Levels

The topics in this section describe the PAR Level reports and utilities in the PAR Vision system. You can access the PAR Level reports using the links in the Data Analysis (PAR Levels) section of the PAR Vision Menu (on the left side of the dashboard).

The Consumption reports and functions include:

[PAR Level Analysis](#)

[PAR Level Analysis Details](#)

[PAR Level Recommendations](#)

[PAR Level Recommendations Details](#)

[PAR Level Recommendations by Cost](#)

[PAR Level Recommendations by Cost Details](#)

[SKU Reduction Recommendations](#)

[Items over PAR Level](#)

[Stock Outs and Critical Hits](#)

[PAR Level Value Over Time](#)

[PAR Level Value Over Time Details](#)

PAR Level Analysis

This function looks at the PAR Levels of items with respect to the number of days-of-use each PAR Level represents. It reports both the number of items and their dollar value within ranges of days-of-use with subsequent drill downs to show detail relating to specific items, items within locations, and days of the week usage patterns for individual items. This allows analysis to support PAR Level reduction.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type -The type of item to be included in the display. This option is only available if you select a single PAR Location. The choices are:

- While Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

Data Fields

Days of Use - The number of days of supply for items based on current PAR levels and usage. For analysis purposes, the number of days is summarized into groupings. The number of days in each group is determined by a setting on the [System Administration](#) screen. Depending on this setting, you will see one of the two breakdowns shown below.

- **Infinite (no usage)** - there is no usage statistics for these items.
- **< 500** - there is more than 500 days of supply for these items.
- **100 - 500** - there is 100 to 500 days of supply.
- **30 - 100** - there is 30 to 100 days of supply.
- **14 - 30** - there is 14 to 30 days of supply .
- **7 - 14** - there is 7 to 14 days of supply.
- **3 - 7** - there is 3 to 7 days of supply.
- **> 3** - there is less than 3 days of supply.
- **Infinite (no usage)** - there is no usage statistics for these items.
- **< 365** - there is more than 365 days of supply for these items.
- **180 - 365** - there is 180 to 365 days of supply.
- **90 - 180** - there is 90 to 180 days of supply.
- **30 - 90** - there is 30 to 90 days of supply.
- **14 - 30** - there is 14 to 30 days of supply .
- **7 - 14** - there is 7 to 14 days of supply.
- **3 - 7** - there is 3 to 7 days of supply.
- **> 3** - there is less than 3 days of supply.

Population - The number of items that fall into the corresponding # of days of use range.

% of Total - The percentage of the total population of items found in this grouping.

Value - The value of the items in this grouping.

% of Total - The percentage of the total value of all items found in this grouping.



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Days of Use is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on one of the groupings in the chart to see the [PAR Level Analysis Detail](#) for that grouping. The detail screen shows the individual items that make up the group.

From the PAR Level Analysis Details screen you can drill down again to see [Item Day of the Week Usage Summary](#) (the usage and receipt pattern for an item by day of the week).

PAR Level Analysis Details

The PAR Level Analysis Details screen shows you the individual items that make up the grouping that was selected on the Summary screen. You can use this screen to identify slow moving items that may be candidates PAR level reduction.

Selection Criteria

If you selected **All PAR Locations** on the summary screen, there are no additional selections available on this screen.

If a single PAR Location was selected, you can change your selection for **White items**, **Blue items** or **PAR Bin items** on this screen.

Data Fields

The message above the table tells you the **Grouping** that was selected on the summary screen.

All PAR Locations

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

ADU - Average daily usage for this item.

AMU - Average monthly usage for the item.

Unit - The unit of measure used to dispense the item.

PAR Level -The total PAR Level for all locations where the item is stocked.

PAR Level Days - The number of days of usage that would be available if the item was at PAR Level.

Locations Stocked - The number of locations where this item is stocked.

Unit Cost - The average cost of the items in inventory.

PAR Level Cost - The total cost of the item when it is at PAR Level.

Single PAR Location

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

ADU - Average daily usage for this item at this PAR Location.

AMU - Average monthly usage for the item at this PAR Location.

Unit - The unit of measure used to dispense the item at this PAR Location.

PAR Level -The PAR Level for this item at this PAR Location.

PAR Level Days - The number of days of usage that would be available if the item was at PAR Level.

Crit Level -The critical level for this item at this PAR Location.

Crit Level Days - The number of days of usage that would be available if the item was at critical level.

QOH -The current quantity on hand for this item at this PAR Location.

QOH Days - The number of days of usage that is currently available.

PAR Location - The name of the PAR Location.

Days - The number of days of information available to do these calculations (but not more than the last six months).

Unit Cost - The cost of the item.

PAR Level Cost - The cost of the item when it is at PAR Level.

Sorting Capabilities

Average Daily Usage is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

If the selection on the summary screen was to All PAR Locations, then you can click on an item to see the un-combined date for that item (see the description of *Single PAR Location* above).

When the un-combined data is displayed, if you click on an Item/PAR Location row, you will see the [Item Day of the Week Usage Summary](#).

PAR Level Recommendations

Allows the user to specify either a "fixed quantity" or "days of inventory" for ranges of Average Daily Usage. The system then provides summary information as to the number of items and their value across ranges of the # of days of use so that you can see the impact of the scenario that was input.

The user may then view and/or modify the recommended PAR Levels or Critical Levels and then export the reviewed information to either the PAR Excellence database or an Excel spreadsheet.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type -The type of item to be included in the display. The choices are:

- White Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

ADU Criteria

PAR Level - Qty or Days - These fields let you specify a "fixed quantity" for the PAR Level or a "number of days of inventory" desired (and the system will calculate the PAR Level). Specify the values by item groupings based on average daily usage (ADU).

For example; for items with average daily usage less than 1, you can set PAR Level at the fixed quantity of 1 and for items with an average usage of 1-5, you can say you want to maintain 2 days of inventory, etc.

Critical Level - Qty or Days - Same as the PAR Level fields described above, but used to calculate Critical Level.

After you have completed your selections for PAR Level and Critical Level, click the **Show Effect** button to see how your choices affect the PAR Level Recommendations summary.

Data Fields

The analysis shows two tables with associated pie charts. The left side is the PAR Level analysis using the current PAR Level data. The right side is the analysis using recommended values based on your input for **PAR Level Qty/Days** and **Critical Level Qty/Days**.

Days of Use - The number of days of supply for items based on current PAR levels and usage. For analysis purposes, the number of days is summarized into the following groupings:

- **Infinite (no usage)** - there is no usage statistics for these items, so stock will never run out.
- **< 500** - there is more than 500 days of supply for these items.
- **100 - 500** - there is 100 to 500 days of supply.
- **30 - 100** - there is 30 to 100 days of supply.
- **14 - 30** - there is 14 to 30 days of supply (i.e., two weeks to a month).
- **7 - 14** - there is 7 to 14 days of supply (i.e., one to two weeks).
- **3 - 7** - there is 3 to 7 days of supply.
- **3** - there is less than 3 days of supply.

Population - The number of items that fall into the corresponding # of days of use range.

% of Total - The percentage of the total population of items found in this grouping.

Value - The value of the items in this grouping.

% of Total - The percentage of the total value of all items found in this grouping.



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Days of Use is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on one of the groupings in the chart to see the [PAR Level Analysis Detail](#) for that grouping. The detail screen shows the individual items that make up the group.

From the PAR Level Analysis Details screen you can drill down again to see [Item Day of the Week Usage Summary](#) (the usage and receipt pattern for an item by day of the week).

Click the **Export** button to see the [PAR Level Recommendations Details](#) that will let you fine tune the recommendations and/or export the recommendations for further analysis. You can even apply the recommendations directly to the database so they will be used for future requisitioning and ordering.

PAR Level Recommendations Details

This component of the PAR Levels Recommendation function lets you review and fine tune the recommendations made by the system for PAR Level of each item. You can also export the recommendations to a spreadsheet if you if you would rather do your analysis using Excel.

When all the recommendations have been reviewed and you have made your manual changes, you can apply the changes to the database to update the PAR Levels at the selected location.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type -The type of item to be included in the display. The choices are:

- While Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

ADU Criteria

PAR Level - Qty or Days - These fields let you specify a "fixed quantity" for the PAR Level or a "number of days of inventory" desired (and the system will calculate the PAR Level). Specify the values by item groupings based on average daily usage (ADU).

For example; for items with average daily usage less than 1, you can set PAR Level at the fixed quantity of 1 and for items with an average usage of 1-5, you can say you want to maintain 2 days of inventory, etc.

Critical Level - Qty or Days - Same as the PAR Level fields described above, but used to calculate Critical Level.

After you have completed your selections for PAR Level and Critical Level, click the **Recalculate** button to see how your choices affect the PAR Level Recommendations.

Export Target

PAR Excellence Database - If you click one of the Export buttons with this option selected, the PAR Levels shown on the screen will be applied to the database and it will affect requisitioning and ordering. When you select this option be certain that the PAR Level values are accurate because you will potentially be making mass changes to the system.

Excel Spreadsheet - When this option is selected, the PAR level values will be exported to a spreadsheet and no changes are made to the database. Use this option when you want to do further analysis of the data prior to updating the database, or you can use the spreadsheet as a guide to make changes to PAR Levels using the PAR Excellence online system.

Print Version or Screen Version - Click this icon to toggle the display between a format that is more suitable for printing and a format the is easier for data entry.



When you switch from Screen Version to Print Version (or back), all changes you have entered will be lost. So, you should decide which format you want to work with *before* you start making changes.

Export Checked, All ADU Categories - The PAR level recommendations are displayed on the screen grouped by average daily usage. If you want to export all groups at once (either to the database or to a spreadsheet) click this button. Alternately, each category has an Export button that can be used to export the data only for that grouping.

Export Checked ADU = ?? - This button appears at the top of each table that groups PAR levels by average daily usage. Clicking this button exports only the data in the associated grouping.

On/Off - These buttons appear above the check box column for each grouping by average daily usage. Click the On button to check all items in the group or click the off button to un-check all items in the group.



When you click any one of the Export buttons, only the associated items that are checked will be Exported. This gives you the control and flexibility to pick and choose the items to be exported.

Check Box (by item) - Each item on the screen is preceded by a check box which you can use to specify which items should be exported. If the box is checked the item will be exported, if it is blank it will not be exported.

Data Fields

Item Number and **Description** - The item number and description of an item at the selected PAR Location.

PAR Level

Current - The current PAR Level for the item at the location (this value cannot be changed).

New - The recommended PAR Level based on the ADU criteria specified. This is a data entry field and you can change the recommended value if you want to set the PAR level to something other than what was recommended.

Critical Level

Current - The current critical level for the item at the location (this value cannot be changed).

New - The recommended critical level based on the ADU criteria specified. This is a data entry field and you can change the recommended value if you want to set the critical level to something other than what was recommended.

Blue item - If this is a blue-label item there is no critical level so the Current and New values are not displayed.

Calculation Override Messages - You may notice additional information displayed in red in either (or both) of the PAR Level column and Critical Level column of the report. These are situations where it is not possible to set the PAR Level or Critical Level to the calculated value. The message contains the calculated value and the reason for the override. For example:

- **Min = 10 Calc = 8** - The calculated value is less than the minimum PAR Level so the value is set to the minimum.
- **Max = 10 Calc = 12** - The calculated value is greater than the maximum PAR Level so the value is set to the maximum.

- **Calc = 12 Factor = 24** - The calculated value is not possible because of the conversion factor of the replenishment unit of measure so the value is set to a number that is a multiple of the conversion factor.

Sorting Capabilities

Item Number within average daily usage grouping is the default sort field.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

When you click one of the Export buttons, you will see the [PAR Level Recommendations Export](#) screen. This screen show you all the data that will be exported to the spreadsheet or the database with one last chance to review the data and confirm or abort your choice. This confirmation process is not so important when exporting to a spreadsheet, however, it is *very* important when exporting to the database. Once you click the **Make changes to database** button, all PAR levels shown on the PAR Level Recommendations Export screen will be applied to the database.

PAR Level Recommendations by Cost

Allows the user to Input various item cost ranges and to input either a "fixed quantity" or "number of days" attributable to PAR Levels or Critical Levels as well as either a "distinct quantity" or "number of days" or a "percentage of the PAR Level" and have the system calculate new PAR Levels, Critical Levels and Re-Order Points based upon the user input.

This allows these levels to be established based on Cost of items rather than simply on usage. The assumption is that lower cost items should be maintained at higher levels in order to decrease the labor component associated with assessment and replenishment activities. The labor component is measured in "Picks/Week".

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type -The type of item to be included in the display. The choices are:

- While Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

ADU * Cost Criteria

PAR Level - Qty or Days - These fields let you specify a "fixed quantity" for the PAR Level or a "number of days of inventory" desired (and the system will calculate the PAR Level). Specify the values by item groupings based on average daily usage times the item cost (ADU * item cost). Usage times cost is a measure of the true value of an item because it takes into account inexpensive items with a high usage volume, as well as, expensive items with a low volume.

For example; for items with value under \$1, you can say you want to maintain 30 days of inventory, and for items with a value over \$50, you can say you want to maintain a fixed quantity of 10 items, etc.

Critical Level - Qty or Days - Same as the PAR Level fields described above, but used to calculate Critical Level.

Re-Order Point - Qty or Days of % of PAR- Qty and Days are the same as described above for PAR Level and this selection also allows for % of PAR. Enter the "fixed quantity" or the "number of days of inventory" or a "percentage of the PAR Level" at which you want to re-order. For example, you may want to re-order when the inventory is at 25% of the PAR Level.

After you have completed your selections for PAR Level and Critical Level, click the **Show Effect** button to see how your choices affect the PAR Level Recommendations summary.

Picks/Week Summary

The information in this section cannot be changed by the user and it contains a summary of how the Picks per Week will be affected by the selections you have made. This is important because you want to minimize the number of picks per week, especially on low value items, because the labor cost to replenish the item exceeds the value of maintaining a "just in time" inventory of those items.

Data Fields

The analysis shows two tables with associated pie charts. The left side is the PAR Level analysis using the current PAR Level data. The right side is the analysis using recommended values based on your input for **PAR Level Qty or Days** and **Critical Level Qty or Days** in the ADU times Cost fields.

Days of Use - The number of days of supply for items based on current PAR levels and usage. For analysis purposes, the number of days is summarized into the following groupings:

- **Infinite (no usage)** - there is no usage statistics for these items, so stock will never run out.
- **< 500** - there is more than 500 days of supply for these items.
- **100 - 500** - there is 100 to 500 days of supply.
- **30 - 100** - there is 30 to 100 days of supply.
- **14 - 30** - there is 14 to 30 days of supply (i.e., two weeks to a month).
- **7 - 14** - there is 7 to 14 days of supply (i.e., one to two weeks).
- **3 - 7** - there is 3 to 7 days of supply.
- **3** - there is less than 3 days of supply.

Population - The number of items that fall into the corresponding # of days of use range.

% of Total - The percentage of the total population of items found in this grouping.

Value - The value of the items in this grouping.

% of Total - The percentage of the total value of all items found in this grouping.



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Days of Use is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on one of the groupings in the chart to see the [PAR Level Analysis Detail](#) for that grouping. The detail screen shows the individual items that make up the group.

From the PAR Level Analysis Details screen you can drill down again to see [Item Day of the Week Usage Summary](#) (the usage and receipt pattern for an item by day of the week).

Click the **Export** button to see the [PAR Level Recommendations by Cost Details](#) that will let you fine tune the recommendations and/or export the recommendations for further analysis. You can even apply the recommendations directly to the database so they will be used for future requisitioning and ordering.

PAR Level Recommendations by Cost Details

This component of the PAR Levels Recommendation function lets you review and fine tune the recommendations made by the system for PAR Level of each item. You can also export the recommendations to a spreadsheet if you would rather do your analysis using Excel.

When all the recommendations have been reviewed and you have made your manual changes, you can apply the changes to the database to update the PAR Levels at the selected location.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type -The type of item to be included in the display. The choices are:

- While Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

ADU * Cost Criteria

PAR Level - Qty or Days - These fields let you specify a "fixed quantity" for the PAR Level or a "number of days of inventory" desired (and the system will calculate the PAR Level). Specify the values by item groupings based on average daily usage times the item cost (ADU * item cost). Usage times cost is a measure of the true value of an item because it takes into account inexpensive items with a high usage volume, as well as, expensive items with a low volume.

For example; for items with value under \$1, you can say you want to maintain 30 days of inventory, and for items with a value over \$50, you can say you want to maintain a fixed quantity of 10 items, etc.

Critical Level - Qty or Days - Same as the PAR Level fields described above, but used to calculate Critical Level.

Re-Order Point - Qty or Days of % of PAR- Qty and Days are the same as described above for PAR Level and this selection also allows for % of PAR. Enter the "fixed quantity" or the "number of days of inventory" or a "percentage of the PAR Level" at which you want to re-order. For example, you may want to re-order when the inventory is at 25% of the PAR Level.

After you have completed your selections for PAR Level and Critical Level, click the **Show Effect** button to see how your choices affect the PAR Level Recommendations summary.

Export Target

PAR Excellence Database - If you click one of the Export buttons with this option selected, the PAR Levels shown on the screen will be applied to the database and it will affect requisitioning and ordering. When you select this option be certain that the PAR Level values are accurate because you will potentially be making mass changes to the system.

Excel Spreadsheet - When this option is selected, the PAR level values will be exported to a spreadsheet and no changes are made to the database. Use this option when you want to do further analysis of the data prior to updating the database, or you can use the spreadsheet as a guide to make changes to PAR Levels using the PAR Excellence online system.

Print Version or Screen Version - Click this icon to toggle the display between a format that is more suitable for printing and a format that is easier for data entry.



When you switch from Screen Version to Print Version (or back), all changes you have entered will be lost. So, you should decide which format you want to work with *before* you start making changes.

Export Checked, All ADU Categories - The PAR level recommendations are displayed on the screen grouped by average daily usage. If you want to export all groups at once (either to the database or to a spreadsheet) click this button. Alternately, each category has an Export button that can be used to export the data only for that grouping.

Export Checked - This button appears at the top of each table that groups PAR levels by average daily usage times cost. Clicking this button exports only the data in the associated grouping.

On/Off - These buttons appear above the check box column for each grouping by average daily usage times cost. Click the On button to check all items in the group or click the off button to uncheck all items in the group.



When you click any one of the Export buttons, only the associated items that are checked will be Exported. This gives you the control and flexibility to pick and choose the items to be exported.

Check Box (by item) - Each item on the screen is preceded by a check box which you can use to specify which items should be exported. If the box is checked the item will be exported, if it is blank it will not be exported.

Data Fields

Item Number and Description - The item number and description of an item at the selected PAR Location.

PAR Level

Current - The current PAR Level for the item at the location (this value cannot be changed).

New - The recommended PAR Level based on the ADU times cost criteria specified. This is a data entry field and you can change the recommended value if you want to set the PAR level to something other than what was recommended.

Critical Level

Current - The current critical level for the item at the location (this value cannot be changed).

New - The recommended critical level based on the ADU times cost criteria specified. This is a data entry field and you can change the recommended value if you want to set the critical level to something other than what was recommended.

Blue item - If this is a blue-label item there is no critical level so the Current and New values are not displayed.

Re-Order Point

Current - The current re-order point for the item at the location (this value cannot be changed).

New - The recommended re-order point based on the ADU times cost criteria specified. This is a data entry field and you can change the recommended value if you want to set the re-order point to something other than what was recommended.

Blue item - If this is a blue-label item there is no re-order point so the Current and New values are not displayed.

ADU - The average daily usage that was calculated for this item. This value is displayed for informational purposes only and cannot be changed.

Calculation Override Messages - You may notice additional information displayed in red in either (or both) of the PAR Level column and Critical Level column of the report. These are situations where it is not possible to set the PAR Level or Critical Level to the calculated value. The message contains the calculated value and the reason for the override. For example:

- **Min = 10 Calc = 8** - The calculated value is less than the minimum PAR Level so the value is set to the minimum.
- **Max = 10 Calc = 12** - The calculated value is greater than the maximum PAR Level so the value is set to the maximum.
- **Calc = 12 Factor = 24** - The calculated value is not possible because of the conversion factor of the replenishment unit of measure so the value is set to a number that is a multiple of the conversion factor.

Sorting Capabilities

Item Number within average daily usage grouping is the default sort field.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

When you click one of the Export buttons, you will see the [PAR Level Recommendations by Cost Export](#) screen. This screen shows you all the data that will be exported to the spreadsheet or the database with one last chance to review the data and confirm or abort your choice. This confirmation process is not so important when exporting to a spreadsheet, however, it is very important when exporting to the database. Once you click the **Make changes to database** button, all PAR levels shown on the PAR Level Recommendations Export screen will be applied to the database.

SKU Reduction Recommendations

Designed to evaluate the impact of slow moving inventory on a selected PAR location. This utility serves two primary functions, first to identify extremely low velocity items and their costs that could be centralized (Central Supply or other like location) thus freeing up valuable storage space. This storage space could then be better utilized for high velocity or urgent need items.

The second function of this utility examines the labor element attached to centralizing the low velocity items. This is measured in trips, meaning how many deliver/pick-up trips to or from a central location would it cost to consolidate these supplies. Users can then balance improved storage utilization against the labor to support slow moving items from a central location.

What would the effect be on the number of items stocked at a location if Caregivers were required to obtain certain low-use items via an alternative means such as a phone call or having the items stored in a central location apart from their regular storage location? This report compiles information based on historical usage to show you the answer. How many of the alternative requests per week equals how many potential SKU reductions is shown.

Based on the number of trips per week you are willing to make to some alternative source, the system tells you how many items can be removed from the PAR Location inventory.

Selection Criteria

PAR Location - Select a PAR Location to be analyzed.

Item Type - The type of item to be included in the display. The choices are:

- White Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

Consigned or Purchased - Select whether the report should contain only items that are on consignment from the manufacturer or purchased or both (default).

Data Fields

If you are willing to make this many trips per week to a central location - This is the number of times you would have to retrieve an item from a central location (because it is not stocked at the PAR Location).

You can eliminate this many SKUs - This is the number of items that could be removed from the PAR Location inventory (based on making the number of trips to a central location).

For example; if there is an item in the PAR Location inventory that is only used, on average, once a week, if you are willing to make one trip per week to the central inventory location, you could remove that item from the PAR Location inventory.

% of Total - The percentage of the total population of items stocked at the PAR Location represented by this reduction.

Which represents this much value - The value of the items that could be removed.

% of Total - The percentage of the total value of the items at the PAR Location represented by this reduction.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

If you are willing to make this many trips per week to a central location is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

If you click on a row in the table, you would see the [SKU Reduction Recommendations Detail](#) screen for that row. These are the specific items that could be removed from the PAR Location inventory (given the number of trips to a central inventory location).

SKU Reduction Recommendations Detail

The SKU Reduction Recommendations screen summarizes the number of items that can be removed from the PAR Location inventory (if you are willing to make trips to a central inventory location). This screen tell you specifically which items can be eliminated from the inventory.

The purpose of removing items from the inventory is to reduce the value of the inventory sitting at the PAR Location. There are a number of sound business reasons for minimizing the value of the inventory at the various PAR Locations. You must keep in mind, however, the lost productivity (i.e., labor cost) and possible reduction in patient care quality when a Caregiver must retrieve an item from the central inventory location.

Taking all these factors into account, review this screen for items that might possibly be removed from the PAR Location inventory.

Selection Criteria

Consigned or **Purchased** - Select whether the report should contain only items that are on consignment from the manufacturer or purchased or both (default).

Data Fields

The message (in green) at the top of the screen tells you the **number of items** and **value** that can be eliminated based on a number of **trips** to a central inventory location.

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

ADU - Average daily usage for this item at this PAR Location.

Unit - The unit of measure used to dispense the item at this PAR Location.

PAR Level -The PAR Level for this item at this PAR Location.

PAR Level Days - The number of days of usage that would be available if the item was at PAR Level.

Crit Level -The critical level for this item at this PAR Location.

Crit Level Days - The number of days of usage that would be available if the item was at critical level.

QOH -The current quantity on hand for this item at this PAR Location.

QOH Days - The number of days of usage that is currently available.

PAR Location - The name of the PAR Location.

Days - The number of days of information available to do these calculations (but not more than the last six months).

Unit Cost - The cost of the item.

PAR Level Cost - The cost of the item when it is at PAR Level.

Consigned - Indicates whether the items is on consignment or purchased.

Sorting Capabilities

ADU (average daily usage) is the default sort field on this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Items over PAR Level

This screen shows items at one, or more, PAR Locations where the quantity on hand is more than the current PAR Level for that item (at that location). Assuming that your PAR Levels are set accurately, this list represents an immediate opportunity to reduce the value of the inventory at the PAR Locations.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

QOH - The current quantity on hand for this item at the PAR Location.

PAR Level -The PAR level for the item at this location.

Cost of Excess - The cost of the excess inventory represented by this item.

PAR Location - The PAR Location.

Sorting Capabilities

Cost of Excess (highest first) is the default sort field for this screen. This tells you your greatest opportunities to reduce PAR Location inventory value.

See [Sorting](#) for more information on sorting PAR Vision lists.

Hit List

If you click on the [Hit List](#) icon in the top right corner of the screen, you will see the Top 10 items with the greatest excess inventory (based on cost) and the top 10 PAR Locations with the greatest overall excess cost.

Items over PAR Level Hit List

This screen displays the Top 10 items with quantity on hand greater than PAR Level. The rating is based on the excess value created by the overage, not simply the quantity. For example, a \$50 item that is over PAR Level by 3 will rate higher than a \$5 item over PAR Level by 10.

The screen also displays the Top 10 PAR Locations based on the total excess value of all items over PAR Level.

The Exclusions feature (described below) gives you the flexibility to remove items from the Top 10 list in cases where an item is not a candidate for quantity reduction, or items that are already being evaluated.

Selection Criteria

Exclusions - Click this button if you want to exclude items (or PAR Locations) from the Top 10 list. These would be items (or PAR Locations) that are not a candidate for quantity reduction, or items (or locations) that are already being evaluated. You can exclude these items so the system will display the next item(s) in the list that have a large excess value.

See [Exclusion](#) for more information on excluding entries from the Hit List.

Data Fields

Inventory Items

Item Number - The PAR Excellence item number.

Item Description - The item description.

PAR Level - The current PAR Level for the item.

QOH - The current quantity on hand.

Cost of Excess - The cost of the excess inventory based on the item cost.

PAR Locations - The PAR Location where this item overage exists..

PAR Locations

PAR Locations - The name of a PAR Location.

Total Cost of Excess - The total cost of all items with quantity on hand greater than PAR Level.

Sorting Capabilities

Cost of Excess is the default sort for the item list on the screen.

Total Cost of Excess is the default sort for the PAR Location list on the screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

If you click on a row in the list of **PAR Locations** you will see a list of items at this location with quantity on hand greater than PAR Level. This list is the same as the list you would get of you selected this PAR Location in the Selection Criteria on the [Items over PAR Level](#) screen.

Stock Outs and Critical Hits

Lists the items that have reached Critical Level or Zero over the last six months (or other selected time period). The system allows sorts such that the items that are the worst offenders are displayed prominently. Drill down presents all transactions relative to the selected item. This allows those items causing problems for Caregivers and materials management to be readily identified and remedied.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Report Period - Select the length of time over which the analysis should be run. The options are the last 6 months down to only the current month.

Show All Items - Check this box to show all items at the location whether or not the item had a Stock Out or Critical Hit in the selected time period. You can now drill-down on any item in the location to the [Transaction History Details](#) report to see the running QOH for an item over the period.

Ignore items with PAR level <= - This field can be used to remove items from the list that have very low PAR levels. For example, if you have an item with a PAR Level of one, each time you use that item it will generate both a zero hit and a critical hit. You may not want these items in the list so you can more easily concentrate on other items. The default value is one so you don't see items in the list with a PAR level of one (as described above). Depending on your PAR Levels and stocking processes, you may want to also ignore items with PAR levels higher than one. Click in the box and enter the PAR level value you want to ignore (and all PAR Levels less than this value).

Data Fields

Item Number - The PAR Excellence item number for an item with a critical hit of zero hit over the reporting period.

Item Description - The item description.

PAR Location - The PAR Location where the critical hit of zero hit occurred.

Critical Hits - The number of time over the reporting period that the item reached the critical inventory level.

Zero Hits - The number of time over the reporting period that the item went to zero quantity on hand.

Days - The number of days of data available for the analysis of this item.

 On this report the **Days** field represents an important piece of information. If a new item (i.e., it has a small number of days of information available) appears on this list, especially if it has a large number of critical hits or zero hits, it would be an indication that you have not set the PAR Level and/or Critical level properly for this item.

Sorting Capabilities

Zero Hits (descending) is the default sort field on this screen. This puts the problem items at the top of the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an item on the screen to see the [Transaction History Details](#). This history tells you exactly when and why an item reach the critical level and/or zero quantity on hand.

Transaction History Details

This screen shows the detail transactions that have affected the item quantity on hand over the selected reporting period. You can use this information to determine when and why (i.e., which type of transaction) caused the quantity shortage.

If you use the Show All Items option on the Stock Outs and Critical Hits screen you can see the transaction detail for any item in the system. This can be useful when researching a variety of issues, including, problems with orders and receipts, credits, patient charges, etc.

You can display this screen by clicking on an item on the [Stock Outs and Critical Hits](#) screen.

Selection Criteria

Report Period - Select the length of time over which the analysis should be run. The options are the last 6 months down to only the current month. The default is the period that was selected on the summary screen.

Data Fields

Date and Time - The date and time of the transaction.

Transaction - The type of transaction.

Qty - The quantity for this transaction.

New QOH - How the transaction affected the quantity on hand for the item.

Critical - Asterisk (*) if the transaction caused a critical hit (i.e., the quantity on hand reach, or went below, the critical level).

Zero - Asterisk (*) if the transaction caused a zero hit (i.e., quantity on hand reached zero).

Negative - Asterisk (*) if the transaction caused the quantity on hand to go below zero. Under normal circumstances this should never happen, even if inventory is low. The most common cause of a negative quantity for an item is an improperly recorded receipt, or a receipt which was not recorded.

Sorting Capabilities

Transaction Date and **Time** are the default sort for this screen.

Re-sorting of this table is not supported since the **New QOH** value is only meaningful when the list of transactions is displayed in date/time sequence.

PAR Level Value Over Time

This screen can show you how the value of the inventory at the PAR Locations has changed over time. PAR Level value is a product of PAR Level times item cost, so changes to either of these two values for the items stocked at the PAR Location will change the PAR Level value.

Ideally, as you become better at managing your inventory, the PAR Level value will go down. If you assume that the item cost remains the same, PAR Level value will be lowered by reducing the PAR Level for some, or all, items at the location. As you lower PAR Levels you should keep an eye on the [Stock Out and Critical Hits](#) reports to insure that you have not lowered the level for an item by too much.

As we know, however, it is unlikely that item cost will remain constant over any extended period of time. This report can also be used to monitor the cost of the inventory at a location over time. If the cost of goods increases dramatically at any point, or if costs continue to rise month over month, you might want to look for new replenishment sources for some, or all, of your inventory items.

Options for the report (see Selection Criteria below) allow you to hold either one of the two factors constant so you can clearly see changes to the other.

The report also includes a graphical representation of the value changes so it is visually obvious when and why large changes occur.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Report Period - Select the period of time over which you want to see PAR Level value changes. You can look at the data going back as far as 6 months.

Isolate Cost or PAR Level changes - The third selection field (which has no title on the screen) allows you to isolate changes to either the Cost or the PAR Level.

- **Show PAR Level and cost changes simultaneously (default)** - This selection will show the true change in the value over the period because it will reflect both changes in PAR Level and changes in item cost.

- **Isolate PAR Level changes** - This selection lets you focus on how changes to the PAR Level only has affected the value. You can fix the cost based on its value in a specified month, so any fluctuation in the value is attributable to a change in the PAR Level. Use this selection if you are trying reduce the value by reducing PAR Level so you get an accurate gauge of your progress.
- **Isolate cost changes** - This selection lets you focus on how price increases (or decreases) only have affected the value. You can fix the PAR Level based on its value in a specified month, so any fluctuation in value is attributable to a change in item cost. Use this selection if you are analyzing costs in anticipation of changing vendors.

Data Fields

Check Box - The check box at the beginning of each row can be used to select PAR Locations to be included in the graph. Check the boxes for the PAR Locations to be graphed and then click the graph icon  in the header row of the table.

PAR Location - A PAR Location.

Months - The report shows the PAR Level value for each month in the selected Report Period. The calculation takes into effect your selection for isolating PAR Level or cost. For example, if you selected Isolate PAR Level, any change in value is a result of decreasing (or increasing) PAR Level(s).



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

PAR Location is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location in the table to see the [PAR Level Value Over Time Details](#) screen. The details screen shows the value over time data for the individual items stocked at the selected location.

Check the box in the first column of the table for one or more PAR Locations and click the graph icon  to see the value over time data in plotted in a graph. After analyzing the graph, you can return to the data sheet by clicking the data sheet icon  above the graph.

PAR Level Value Over Time Details

This screen displays the PAR Level value over time data for the individual items stocked at a PAR Location. PAR Level value is a product of PAR Level times item cost, so changes to either of these two values for an item will change the PAR Level value.

Ideally, as you become better at managing your inventory, the PAR Level value will go down. If you assume that the item cost remains the same, PAR Level value will be lowered by reducing the PAR

Level for an item. As you lower PAR Levels you should keep an eye on the [Stock Out and Critical Hits](#) reports to insure that you have not lowered the level for an item by too much.

As we know, however, it is unlikely that item cost will remain constant over any extended period of time. This report can also be used to monitor the cost of an item over time. If the cost of an item increases dramatically at any point, or if costs continue to rise month over month, you might want to look for new replenishment sources for that item.

Options for the report (see Selection Criteria below) allow you to hold either one of the two factors constant so you can clearly see changes to the other.

Selection Criteria

PAR Location - Select a PAR Location.

Report Period - Select the period of time over which you want to see PAR Level value changes. You can look at the data going back as far as 6 months.

Isolate Cost or PAR Level changes - The third selection field (which has no title on the screen) allows you to isolate changes to either the Cost or the PAR Level.

- **Show PAR Level and cost changes simultaneously (default)** - This selection will show the true change in the value over the period because it will reflect both changes in PAR Level and changes in item cost.
- **Isolate PAR Level changes** - This selection lets you focus on how changes to the PAR Level only has affected the value. You can fix the cost based on its value in a specified month, so any fluctuation in the value is attributable to a change in the PAR Level. Use this selection if you are trying reduce the value by reducing PAR Level so you get an accurate gauge of your progress.
- **Isolate cost changes** - This selection lets you focus on how price increases (or decreases) only have affected the value. You can fix the PAR Level based on its value in a specified month, so any fluctuation in value is attributable to a change in item cost. Use this selection if you are analyzing costs in anticipation of changing vendors.

Show - The last selection field on this screen (which also has no title on the screen) lets you change the information that is displayed in the table.

- **Show Value (default)** - Displays the PAR Level Value.
- **Show Level** - Displays the PAR Level for each item. Use this selection if you are isolating PAR Level (i.e., cost is fixed) so you can see the actual changes in PAR Level.
- **Show Cost** - Displays the Cost for each item. Use this selection if you are isolating cost (i.e., PAR Level is fixed) so you can see the actual changes in item cost.
- **Show Value and Level** - Displays the PAR Level Value and PAR Level for each item. Use this selection if you are isolating PAR Level (i.e., cost is fixed) so you can see the actual changes in PAR Level and how that affects the value for each item.
- **Show Value and Cost** - Displays the PAR Level Value and Cost for each item. Use this selection if you are isolating cost (i.e., PAR Level is fixed) so you can see the actual changes in item cost and how that affects the value for each item.

- **Show Level and Cost** - Displays the PAR Level and Cost for each item. Use this selection if you are not isolating either value and you want to see the actual changes in both PAR Level and Cost.
- **Show Value, Level and Cost** - Displays the PAR Level Value, the PAR Level and Cost for each item. Use this selection if you are not isolating either value and you want to see the actual changes in both PAR Level and Cost and how those changes affect the value.

Data Fields

Item Number - The PAR Excellence item number for an item at the selected location.

Item Description - The description of the item.

Months - For each month in the selected Report Period, the report displays the data requested in the **Show** selection criteria. Because the PAR Level and/or cost for an item might change one or more times in a month, the report might display the PAR Level or Cost as an average value in a month. When that happens, the **VALUE IS DISPLAYED IN ORANGE**. Each month box might contain any, or all, of the three fields:

- **PAR Level Value** - PAR Level for the item times item cost.
- **PAR Level** - PAR Level for the item.
- **Cost** - the item cost.



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Item Description is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Consumption

Consumption

The topics in this section describe the Consumption reports in the PAR Vision system. You can access the Consumption reports using the links in the Data Analysis (Consumption) section of the PAR Vision Menu (on the left side of the dashboard).

The Consumption reports and functions include:

[Average Monthly Usage](#)

[Average Monthly Usage Details](#)

[Consumption Analysis](#)

[Item Consumption Comparison](#)

[Consumption Deviation](#)

[Consumption Analysis - Ad Hoc](#)

[Consumption Over Time](#)

[Consumption Deviation Details](#)

[Usage by Physician Summary](#)

[Inventory Turns](#)

Average Monthly Usage

Allows the user to view items sorted as to ranges of Average Monthly Usage. Displays item detail with associated cost and where the items reside in the facility. Particularly valuable to find items that have low usage levels so they can be examined for possible elimination or PAR Level reduction.

Selection Criteria

PAR Location - Select a single PAR Location or All PAR Locations.

Combine PAR Locations - This option is only available when you select All PAR Locations. Check this box to combine the Average Monthly Usage data for each item at the hospital level (i.e., data for all PAR Locations is combined). This selection also affects how the data is displayed on the detail screen if you drill down on one of the statistics in the chart. When this option is selected you do not have the option to select white only, blue only or PAR Bins only (see below).

Item Type -The type of item to be included in the display. This option is only available if you select a single PAR Location. The choices are:

- **While Items** - White-label items.
- **Blue Items** - Blue-label items.
- **PAR Bins Items** - Items which are stocked in PAR Bins.

Data Fields

Average Monthly Usage - The average monthly usage chart summarizes the number of items used and the value of those items into five categories:

- **0 (no usage)** - items that are never used.

- **< .333** - items with usage of less than 1/3 of an item per month.
- **.333 to .666** - items with usage of 1/3 to 2/3 of an item per month.
- **.666 to 1** - items with usage of less than 1 a month (but greater than 2/3 of an item).
- **1 or more** - items that have usage of at least 1 per month.

Population - The number of items that fall into the corresponding range of usage.

% of Total - The percentage of the total population of items found in this grouping.

Value - The value of the items in this grouping.

% of Total - The percentage of the total value of all items found in this grouping.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Average Monthly Usage is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on one of the groupings in the chart to see the [Average Monthly Usage Details](#) for that grouping. The detail screen shows the individual items that make up the group.

From the Average Monthly Usage Details screen you can drill down again to see [Item Day of the Week Usage Summary](#) (the usage and receipt pattern for an item by day of the week).

Average Monthly Usage Details

The Average Monthly Usage Details screen shows you the individual items that make up the grouping that was selected on the Summary screen. You can use this screen to identify slow moving items that may be candidates PAR level reduction.

Selection Criteria

If you selected **Combine PAR Locations** on the summary screen, there are no additional selections available on this screen.

If PAR Locations are not combined, you can change your selection for **White items**, **Blue items** or **PAR Bin items** on this screen.

Data Fields

The message above the table tells you the **Grouping** that was selected on the summary screen.

Combine PAR Locations

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

ADU - Average daily usage for this item.

AMU - Average monthly usage for the item.

Unit - The unit of measure used to dispense the item.

PAR Level -The total PAR Level for all locations where the item is stocked.

PAR Level Days - The number of days of usage that would be available if the item was at PAR Level.

Locations Stocked - The number of locations where this item is stocked.

Average Cost - The average cost of the items in inventory.

PAR Level Cost - The total cost of the item when it is at PAR Level.

PAR Locations not combined

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

ADU - Average daily usage for this item at this PAR Location.

AMU - Average monthly usage for the item at this PAR Location.

Unit - The unit of measure used to dispense the item at this PAR Location.

PAR Level -The PAR Level for this item at this PAR Location.

PAR Level Days - The number of days of usage that would be available if the item was at PAR Level.

Crit Level -The critical level for this item at this PAR Location.

Crit Level Days - The number of days of usage that would be available if the item was at critical level.

QOH -The current quantity on hand for this item at this PAR Location.

QOH Days - The number of days of usage that is currently available.

PAR Location - The name of the PAR Location.

Days - The number of days of information available to do these calculations (but not more than the last six months).

Unit Cost - The cost of the item.

PAR Level Cost - The cost of the item when it is at PAR Level.

Sorting Capabilities

Average Daily Usage is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

If the selection on the summary screen was to Combine PAR Locations, then you can click on an item to see the un-combined data for that item (see the description of *PAR Locations not combined* above).

When the un-combined data is displayed, if you click on an Item/PAR Location row, you will see the [Item Day of the Week Usage Summary](#).

Consumption Analysis

Demonstrates projected usage and cost for items within a user specified PAR location. The utility uses past performance (time period selected by user) to forecast future activity. This data can then be normalized using various pre-defined factors, such as patient days, beds, cases, ADU. This information can then be used for budgeting, demand planning, contract compliance, etc.

Shows consumption (usage) data for specific locations or all locations together and includes the cost for each scenario. When examining the data via individual locations, allows the user to specify the time period (monthly, or the average of the last 6 months) to examine and to specify one of several normalization factors if desired.

Selection Criteria

PAR Location - Select a single PAR Location, a Group of PAR Locations or All PAR Locations.

Use date from - Select to combine the data for the last six months, or choose a specific month. This option is not available if All PAR Locations is selected.

Normalize by - If you have set up [Usage Normalization Factors](#), you can select how you want the data normalized. The default is to use the raw average daily usage (no normalization). This option is not available if All PAR Locations is selected.

Data Fields

The message above the table tells you the **Projected Annual Cost** for all locations or for the selected location.

All PAR Locations

Item Number - The PAR Excellence item number.

Item Description - The description of the item.

ADU - The average daily usage for this item over the last six months.

Unit Cost - The unit cost for the item.

Projected Annual Cost - The projected annual cost for the item for all PAR Locations.

% of Total Annual Cost - The percentage of the total annual cost for all items represented by this item.

ABC - Classification based on the average daily usage and item cost.

- The group of items representing 70% of the total annual cost are **A** class items.
- Those representing the next 20% are **B** class items
- The rest are **C** class items.

Single PAR Location selected

Item Number - The item number.

Item Description - The description of the item.

Use - The actual quantity of this item used over the specified time period.

ADU - The average daily usage for this item over the specified period.

Unit - The issue unit of measure for this item.

Unit Cost - The unit cost for the item.

Projected Annual Cost - The projected annual cost for the item at the selected location.

% of Total Annual Cost - The percentage of the total annual cost for all items represented by this item at the selected location.

ABC - Classification based on the average daily usage and item cost.

- The group of items representing 70% of the total annual cost are **A** class items.
- Those representing the next 20% are **B** class items
- The rest are **C** class items.

Usage per Day - The number of this item used in a day.

Cost per Day - The cost of this item on a daily basis.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Projected Annual Cost is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on one an item to see the [Item Consumption Comparison](#) screen. This drill down information is most valuable when **All PAR Locations** is selected.

Click on the **Ad Hoc** icon on the right side of the title bar to load the [Consumption Analysis - Ad Hoc](#) report. This report will let you run Consumption analysis for any date range.

Item Consumption Comparison

Shows additional consumption information for an item for one or all PAR Locations (depending on the PAR Location selection on the Consumption Analysis screen). If only a single location is selected, the data on this screen will be shaded yellow to alert you that you are not looking at the complete consumption picture for this item. Assuming that All PAR Locations was selected on the summary screen, you can use this screen to compare consumption between various PAR Locations for an item.

Selection Criteria

Use date from - Select to combine the date for the last six months, or choose a specific month. This option is not available if All PAR Locations is selected.

Normalize by - If you have set up [Usage Normalization Factors](#), you can select how you want the data normalized. The default is to use the raw average daily usage (no normalization). This option is not available if All PAR Locations is selected.

Data Fields

The message above the table tells you the **Projected Annual Cost** for this item for all PAR Locations (even if only one PAR Location was selected).

PAR Location - A PAR Location where this item is stocked.

ADU - The average daily usage for this item at this PAR Location over the last six months or for the selected month.

Unit - The unit of measure used for the average daily usage.

Unit Cost - The unit cost for the item.

Projected Annual Cost - The projected annual cost for this location based on average daily usage and item cost.

% of Total Annual Cost - The percentage of the total annual cost for this item represented by this PAR Location.

Number of Days - The number of days of data used for the calculations. This may be less than the selected time frame if the item was not stocked at the PAR Location for the entire selected time.

Usage per - The usage reflected in this field is based on the normalization factor selected. If no normalization factor is selected, it is Usage per Day, otherwise, it is the usage for whatever factor was selected.

Cost per - The cost reflected in this field is based on the normalization factor selected. If no normalization factor is selected, it is Cost per Day, otherwise, it is the cost for whatever factor was selected.

 The data on the screen is shaded yellow when only a single PAR Location is selected to alert you that you are not looking at the complete consumption picture for this item. To see consumption data for this items at all PAR Locations where it is stocked, selected **All PAR Locations** on the summary screen.

Sorting Capabilities

% of Total Annual Cost is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Consumption Analysis - Ad Hoc

This report provides the same information as the [Consumption Analysis](#) report but it allows you to select a custom date range. The standard Consumption Analysis report uses summarized data for pre-determined periods over the past six months but this report lets you run the Consumption Analysis for any date range you choose.

Since the report does not use pre-calculated values it will take longer to run this report than the standard report.

Selection Criteria

PAR Location - Select a single PAR Location, a Group of PAR Locations or All PAR Locations.

Start Date - Enter the date where the Consumption Analysis will start.

End Date - Enter the ending date for the Consumption Analysis.

Update Output - Click this button after you have made all your sections to begin running the report.

Data Fields

The message above the table tells you the **Projected Annual Cost** for all locations or for the selected location.

All PAR Locations

Item Number - The PAR Excellence item number.

Item Description - The description of the item.

ADU - The average daily usage for this item over the last six months.

Unit Cost - The unit cost for the item.

Projected Annual Cost - The projected annual cost for the item for all PAR Locations.

% of Total Annual Cost - The percentage of the total annual cost for all items represented by this item.

ABC - Classification based on the average daily usage and item cost.

- The group of items representing 70% of the total annual cost are **A** class items.
- Those representing the next 20% are **B** class items
- The rest are **C** class items.

Single PAR Location selected

Item Number - The item number.

Item Description - The description of the item.

Use - The actual quantity of this item used over the specified time period.

ADU - The average daily usage for this item over the specified period.

Unit - The issue unit of measure for this item.

Unit Cost - The unit cost for the item.

Projected Annual Cost - The projected annual cost for the item at the selected location.

% of Total Annual Cost - The percentage of the total annual cost for all items represented by this item at the selected location.

ABC - Classification based on the average daily usage and item cost.

- The group of items representing 70% of the total annual cost are **A** class items.
- Those representing the next 20% are **B** class items
- The rest are **C** class items.

Usage per Day - The number of this item used in a day.

Cost per Day - The cost of this item on a daily basis.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Projected Annual Cost is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Consumption Deviation

Allows the user to examine any PAR Location to see which items have exceeded the standard deviation (positive deviations only) for each item for the month preceding the current month (based on the last 6 months of data). This may be used to indicate the largest deviations potentially affecting budgeting variances.

May also view the item details for each item over each of the last 6 months – with choices to view:

- All deviations.
- The deviations exceeding 1 sigma (the standard deviation amount).
- Only the amount of the deviations exceeding 1 sigma (i.e. only the amount beyond the standard deviation).

Selection Criteria

PAR Location - Select a PAR Location.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Average Consumption Cost - The average consumption cost over the last six months.

Standard Deviation - The standard deviation for last month's cost versus the last six months.

Consumption Cost - Last month's consumption cost.

Excess Cost - The amount over the standard deviation.

Sorting Capabilities

Excess Cost is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an item to see the Consumption Deviation Details. The screen shows the item details for each item over each of the last 6 months – with choices to view:

- All deviations
- Only those deviations exceeding 1 sigma
- Only the amount of the deviations exceeding 1 sigma, (i.e. only the amount beyond the standard deviation)

Consumption Deviation Details

Allows the user to examine any PAR Location to see which items have exceeded the standard deviation (positive deviations only) for each item for the month preceding the current month (based on the last 6 months of data). This may be used to indicate the largest deviations potentially affecting budgeting variances.

May also view the item details for each item over each of the last 6 months – with choices to view:

- All deviations.
- The deviations exceeding 1 sigma (the standard deviation amount).
- Only the amount of the deviations exceeding 1 sigma (i.e. only the amount beyond the standard deviation).

Selection Criteria

PAR Location - Select a PAR Location.

Deviation Option

- All deviations.
- The deviations exceeding 1 sigma (the standard deviation amount).
- Only the amount of the deviations exceeding 1 sigma (i.e. only the amount beyond the standard deviation).

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Past Six Months Data:

- **Excess Deviation** - The excess deviation in the month for this item.
- **Cost** - The cost for this item in the month.
 - Red** – The cost exceeds the standard deviation (+ the mean) by the positive amount shown.
 - Yellow** – The cost is less than the standard deviation (+ or - the mean) by the negative amount shown.

- White** – The cost does not exceed the standard deviation (+ or - the mean).

Mean - The mean cost of the past six months.

Std Dev - The standard deviation over the last six months.

Sorting Capabilities

Excess Deviation for last month is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Consumption Over Time

Shows consumption (usage), in terms of dollars, by PAR Location and how it has increased (or decreased) over a period of time. Consumption dollars is a product of usage and item price.

Realistically, you cannot really regulate your usage since it is a by-product of the activity at the hospital. Sometimes, however, you do have the opportunity to regulate the item price. This report provides options that allow you to analyze how your consumption dollars are affected by increases (or decreases) in item price independent of usage.

Additional options for the report allow you to hold either one of the two factors constant so you can clearly see changes to the other.

The report also includes a graphical representation of the changes so it is visually obvious when and why large changes occur.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Report Period - Select the period of time over which you want to see consumption value changes. You can look at the data going back as far as 6 months.

Normalize by - If you have set up [Usage Normalization Factors](#), you can select how you want the data normalized. The default is to use the raw average daily usage (no normalization).

Isolate Price or Usage changes - The last selection field (which has no title on the screen) allows you to isolate changes to either the Price or the Usage.

- **Show usage and price changes *simultaneously*** (default) - This selection will show the true consumption dollars over the period because it will reflect both changes in usage and changes in item price.
- **Isolate usage changes** - This selection lets you focus on how changes to the usage only has affected the consumption dollars. You can fix the price based on its value in a specified month, so any fluctuation in the consumption value is attributable to a change in usage. Use this selection if you want to see how your usage has increased (or decreased) over time.
- **Isolate price changes** - This selection lets you focus on how price increases (or decreases) only have affected the consumption value. You can fix the usage based on its value in a specified

month, so any fluctuation in value is attributable to a change in item price. Use this selection if you are analyzing prices in anticipation of changing vendors.

Data Fields

Check Box - The check box at the beginning of each row can be used to select PAR Locations to be included in the graph. Check the boxes for the PAR Locations to be graphed and then click the graph icon  in the header row of the table.

PAR Location - A PAR Location (including All PAR Locations).

Months - The report shows the consumption value for each month in the selected Report Period. The calculation takes into account your selection for isolating usage or price. For example, if you selected Isolate price, any change in value is a result of an increase (or decrease) in item prices.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

PAR Location is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location in the table to see the [Consumption Analysis](#) for the selected location(s).

Check the box in the first column of the table for one or more PAR Locations and click the graph icon  to see the consumption over time data plotted in a graph. After analyzing the graph, you can return to the data sheet by clicking the data sheet icon  above the graph.

Usage by Physician Summary

A comprehensive report of item usage and cost by Physician. This report tells you which doctors are using which supplies and the average cost of those supplies in a specified date range.

Since this list can get very large and the amount of data on the screen is substantial, it is recommended that you use the Selection Criteria to focus on specific Procedures and use short date ranges.

Selection Criteria

Procedure - Select a Procedure or All Procedures.

PAR Location - Select a PAR Location.

Date Range - Enter the beginning and ending date for your search. Use date ranges with only a few days to create a more manageable list.

Include/Exclude - Select whether transactions with no Physician assigned should be included in the list. Exclude is recommended to minimize the number of entries in the list. Other reports in the system (such as, [Activity Detail](#)) can be used to see a complete list of transactions.

Update Output - Click this button after you have entered or changed your selection criteria to refresh the list.

Data Fields

Physician Name - The name of each Physician (with activity based on the Selection Criteria) is listed as a column in the report.

Avg. Cost Total - The total of the Average Cost for the corresponding Physician.

Number of Cases - The number of Patients being cared for by the corresponding Physician.

Item Description - The description of the item.

Item Number - The PAR Excellence item number.

Average Cost per Item - For each Physician, this is the average cost of the corresponding item used by the Physician.

Total Qty of item Used - For each Physician, this is the quantity of the corresponding item used by the Physician.\



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Avg. Cost Total is the default sort field for this screen.

Because of the complexity of this report, the sorting capabilities differ somewhat from the standard PAR Vision report. In general, you can click on a column to sort by that column (as described in the [Sorting](#) section), however, there are also some additional capabilities.

For example:

- Click on the **Physician>** heading to sort the columns by Physician name.
- Click on the **Avg. Cost Total>** to sort the columns by the Average Total Cost by Physician.
- Click on the **Number of Cases>** heading to sort the columns by the number of cases for each Physician.
- Click on an **Item Description** to sort the columns by Average Cost for that item.

Revenue

Revenue

The topics in this section describe the Revenue reports in the PAR Vision system. You can access the Revenue reports using the links in the Data Analysis (Revenue) section of the PAR Vision Menu (on the left side of the dashboard).

The Revenue reports and functions include:

[Charge/Non-Charge Analysis](#)

[Charge/Non-Charge Detail](#)

[Charge/Non-Charge Hit List](#)

[Patient Charge Markup Analysis](#)

[Patient Charge Markup Detail](#)

[Patient Charge Markup Hit List](#)

Charge/Non-Charge Analysis

Based upon user supplied markups for various item cost ranges and a user supplied reimbursable percentage, shows the potential revenue increase from making either White or Blue items chargeable that currently are not chargeable.

Selection Criteria

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

After you have completed your selection criteria, click the **Show Effect** button to show the Charge/Non-Charge Analysis below.

Data Fields

PAR Location - An entry for All PAR Locations and an entry for each PAR Location.

The system displays the additional potential revenue (annually) if **Non-Charge White-Label items** were made chargeable and if **Blue-Label items** were made chargeable. The effect is displayed at two data points:

100% - if 100% of the charges were reimbursable.

NN% - if charges are reimbursed at the percentage you entered above in the **Reimbursable** field above.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Total is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location to see the [Charge/Non-Charge Detail](#). The details is the effect on each individual item at the PAR Location given the user supplied selection criteria.

Hit List

If you click on the [Hit List](#) icon in the top right corner of the screen, you will see the Top 10 items with the greatest effect on this analysis.

Charge/Non-Charge Detail

Based upon user supplied markups for various item cost ranges and a user supplied reimbursable percentage, shows the potential revenue increase from making either White or Blue items chargeable that currently are not chargeable.

Selection Criteria

PAR Location - Select a PAR Location.

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

Item Type Selection

- **Show White Non-Charge** - Check this box to include the currently non-chargeable while-label items in the detail report.
- **Show Blue** - Check this box to include blue-label items in the detail report.

After you have completed your selection criteria, click the **Show Effect** button to show the Charge/Non-Chare Analysis below.

 The selection fields will be pre-filled with the values selected on the [Charge/Non-Charge Analysis](#) summary screen. You can change any or the values on this screen, and even select a different **PAR Location**, without returning to the summary screen.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Item Type - White or Blue.

ADU - The average daily usage for the item at this PAR Location.

Unit - The unit of measure used to dispense the item.

Unit Cost - The unit cost for the item.

Cost + Markup - The chargeable cost for the item (based on the markup values entered above).

Annual Revenue Potential (at 100%) - The potential revenue if 100% of the charges were reimbursable.

Annual Revenue Potential (at NN%) - The potential revenue if charges were reimbursed at the percentage specified in the **Reimbursable** field above.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Annual Potential Revenue is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Charge/Non-Charge Hit List

This screen displays the Top 10 items, across all PAR Locations, with the largest effect on the Charge/Non-Charge Analysis. Use this list to identify the items that if changed from non-chargeable to chargeable will have greatest impact on your potential revenue.

The Exclusions feature (described below) gives you the flexibility to remove items from the Top 10 list in cases where an item is not a candidate for change regardless the effect it will have on revenue.

Selection Criteria

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

After you have completed your selection criteria, click the **Show Effect** button to show the Charge/Non-Charge Analysis below.

 The selection fields will be pre-filled with the values selected on the [Charge/Non-Charge Analysis](#) summary screen. You can change any or the values on this screen, and even select a different **PAR Location**, without returning to the summary screen.

Exclusions - Click this button if you want to exclude items from the Top 10 list. These would be items that are not a candidate for change regardless the effect it would have on the revenue. Exclude

these items so the system will display the next item(s) in the list that have a large impact on the revenue.

See [Exclusion](#) for more information on excluding entries from the Hit List.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Item Type - White or Blue.

ADU - The average daily usage for the item at this PAR Location.

Unit - The unit of measure used to dispense the item.

Unit Cost - The unit cost for the item.

Cost + Markup - The chargeable cost for the item (based on the markup values entered above).

Annual Revenue Potential (at 100%) - The potential revenue if 100% of the charges were reimbursable.

Annual Revenue Potential (at NN%) - The potential revenue if charges were reimbursed at the percentage specified in the **Reimbursable** field above.



The information displayed for each hit list item is the same as the data on the [Charge/Non-Charge Detail](#) screen, however, it is for all PAR Locations combined (the detail screen shows items at a single location). To see the information for the individual location, click on one of the items in the hit list.

Sorting Capabilities

Annual Potential Revenue is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an item in the hit list to see this same information for this item for each individual PAR Location.

Patient Charge Markup Analysis

Based upon user supplied markups for various item cost ranges and a user supplied reimbursable percentage, shows the Annual Chargeable Item Revenue at Current Patient Cost versus Annual Chargeable Item Revenue at Specified Markup and shows the difference between the two.

Can be used to show the impact of various markup strategies.

Selection Criteria

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

After you have completed your selection criteria, click the **Show Effect** button to show the Patient Charge Markup Analysis below.

Data Fields

PAR Location - An entry for All PAR Locations and an entry for each PAR Location.

The system displays annual revenue given the **Current Patient Cost** and the potential revenue at the **Specified Markup**. The effect is displayed at two data points:

- **100%** - if 100% of the charges were reimbursable.
- **NN%** - if charges are reimbursed at the percentage you entered above in the **Reimbursable** field above.

Difference - The revenue difference between the values described above.



There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Difference is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location to see the [Patient Charge Markup Detail](#). The details is the effect on each individual item at the PAR Location given the user supplied selection criteria.

Hit List

If you click on the [Hit List](#) icon in the top right corner of the screen, you will see the Top 10 items with the greatest effect on this analysis.

Patient Charge Markup Detail

Based upon user supplied markups for various item cost ranges and a user supplied reimbursable percentage, shows the Annual Chargeable Item Revenue at Current Patient Cost versus Annual Chargeable Item Revenue at Specified Markup and shows the difference between the two.

Can be used to show the impact of various markup strategies.

Selection Criteria

PAR Location - Select a PAR Location.

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

After you have completed your selection criteria, click the **Show Effect** button to show the Charge/Non-Charge Analysis below.

 The selection fields will be pre-filled with the values selected on the [Patient Charge Markup Analysis](#) summary screen. You can change any or the values on this screen, and even select a different **PAR Location**, without returning to the summary screen.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

ADU - The average daily usage for the item at this PAR Location.

Unit - The unit of measure used to dispense the item.

Unit Cost - The unit cost for the item.

Current Markup % - The current markup percentage on the item cost for charging the patient.

Current Patient Cost - The current chargeable item cost.

Cost + New Markup - The new chargeable cost for the item based on the new markup values entered above.

Difference (at 100%) - The potential revenue difference if 100% of the charges were reimbursable.

Difference (at NN%) - The potential revenue difference if charges were reimbursed at the percentage specified in the **Reimbursable** field above.

 There may also be a **NOTE** at the top of the screen warning you that there are [Items with \\$0 Cost](#).

Sorting Capabilities

Difference is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Patient Charge Markup Hit List

This screen displays the Top 10 items, across all PAR Locations, with the largest effect on the Patient Charge Markup Analysis. Use this list to identify the items that if patient cost was increased will have greatest impact on your potential revenue.

The Exclusions feature (described below) gives you the flexibility to remove items from the Top 10 list in cases where an item is not a candidate for change regardless the effect it will have on revenue.

Selection Criteria

Markup Cost by - Enter an item cost range and markup percentage (or flat dollar amount) for items in that range. You can enter up to five cost ranges, however, you do not have to specify all cost ranges (enter 0 in both boxes for entries you do not plan to use).

Reimbursable - Enter the estimated percentage of the charges that would be reimbursable.

After you have completed your selection criteria, click the **Show Effect** button to show the Patient Charge Markup Analysis below.

 The selection fields will be pre-filled with the values selected on the [Patient Charge Markup Analysis](#) summary screen. You can change any or the values on this screen, and even select a different **PAR Location**, without returning to the summary screen.

Exclusions - Click this button if you want to exclude items from the Top 10 list. These would be items that are not a candidate for change regardless the effect it would have on the revenue. Exclude these items so the system will display the next item(s) in the list that have a large impact on the revenue.

See [Exclusion](#) for more information on excluding entries from the Hit List.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

ADU - The average daily usage for the item at this PAR Location.

Average Cost - The average cost (across all PAR Locations) for the item.

Avg. Current Markup % - The average current markup percentage (across all PAR Locations) on the item cost for charging the patient.

Avg. Current Patient Cost - The current chargeable item cost (across all PAR Locations).

Avg. Cost + New Markup - The new chargeable cost for the item (across all PAR Locations) based on the new markup values entered above.

Difference (at 100%) - The potential revenue difference if 100% of the charges were reimbursable.

Difference (at NN%) - The potential revenue difference if charges were reimbursed at the percentage specified in the **Reimbursable** field above.



The information displayed for each hit list item is the same as the data on the [Patient Charge Markup Detail](#) screen, however, it is for all PAR Locations combined (the detail screen shows items at a single location). To see the information for the individual location, click on one of the items in the hit list.

Sorting Capabilities

Difference is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an item in the hit list to see this same information for this item for each individual PAR Location.

Setup

Setup

The topics in this section describe the data analysis Setup utilities in the PAR Vision system. You can access the data analysis Setup utilities using the links in the Data Analysis (Setup) section of the PAR Vision Menu (on the left side of the dashboard).

The data analysis Setup utilities include:

[PAR Level Minimums and Maximums](#)

[Usage Normalization Factors](#)

Usage Normalization Factors

This setup utility allows authorized users to create different *factors* by which consumption can be analyzed. In the absence of normalization factors, all consumption analysis is done by the number of days in a month. Normalization factors can let you analyze inventory consumption by different criteria. For example, you can do consumption analysis based on the number of beds in a location, or based on the number of patient days rather than strictly calendar days.

These normalization factors can be very beneficial particularly when using the [Item Consumption Comparison](#) function because it lets you make meaningful comparisons between locations of varying sizes. For example, it might be meaningless to compare the consumption of a location with 100 beds to one with 10 beds based solely on the raw average daily usage of an item. If you compare the usage by bed, however, the comparison could be much more meaningful.

This can be valuable in the areas of budgeting, supply forecasting, and case costing.

[Procedures](#)

Add or Remove a Category

The first thing you must do when setting up the normalization factors is to define the criteria you wish to use to analyze consumption. These are called *the Normalization Categories*. For example, you may wish to analyze consumption based on the number of *Beds* at the location(s) and the number of *Patient Days* at the location(s).

1. Click the Add/Remove Category button.
2. In the blank box at the top of the screen enter a category (for example, Beds) and click the Add New Category button.
3. Enter another category (for example, Patient Days) and click **Add New Category**.
4. Continue until all categories have been entered.
5. If a category appears that is no longer used (or was entered in error), click the **Delete** button to the left of the Category name to remove the category.
6. When the category list is complete, click the **Previous Page** button in the [PAR Vision menu bar](#).

Add or Change the Factors

Now you can define the actual factor for each category at each location. For example, you can tell the system that Location X has 10 beds and Location Y has 100 beds.

1. Select a Month from the drop down list. Factors are defined by month to allow for fluctuation month after month. For example, if you are remodeling one of the floors at the hospital, you may have more beds at the location once the renovation is complete.
2. You can ask the system to display the average of the past six months of Factors if you select **Average last 6 months** from the list, however, you cannot apply updates when you are in this mode. This is simply to help you set up the factors for a new month.
3. The screen displays each PAR Location and a column for each Category you have defined. In each box, enter the Factor for that category at the corresponding location. For example, in the Beds column for Location X, enter 10 and in the Beds column for Location Y, enter 100.
4. After all Factors have been entered, click the **Submit Changes** button.

Reports

Reports

The topics in this section describe the generic reports available in the PAR Vision system. You can access these reports using the links in the Reports section of the PAR Vision Menu (on the left side of the dashboard). The Reports section also contains several sub-menus in which you will find reports logically grouped by report type and/or function. The sub-menus found under the Reports section include:

[Item Reports](#)

[Activity and History Reports](#)

[Quantity On Hand Reports](#)

[Order Reports](#)

[Patient and Charging Reports](#)

[Usage Reports](#)

[PAR Bins Reports](#)

[PAR Express Reports](#)

[Reconciliation Reports](#)

[Exception Reports](#)

[Physicians Reports](#)

[Expirations](#)

The generic reports in the Reports in this section (not included in one of the sub-menus include:

[Replenishment Sources](#)

[Unregistered iButton Touches](#)

[Borrow Card Registrations](#)

Replenishment Sources

This report provides a list of the Replenishment Sources that you have defined in the PAR Excellence System. Replenishment sources are used primarily to define the interface format used by the PAR Excellence System when sending orders to the hospital MMIS system. For example, when an order is built for items in the hospital central supply room, the replenishment source might specify that the system print a pick ticket. Items being replenished from Owens & Minor, on the other hand, might specify that the information be written to a file in a specific format that is transmitted electronically to the MMIS system.

Data Fields

Source - The name of the replenishment source.

Number - The (optional) number assigned to the replenishment source.

Type - The type of source. This is normally one of two values; *Internal* for sources inside the hospital and *External* for sources representing an outside vendor.

Interface - The interface format to use when communicating to the hospital MMIS system.

Percent - Global re-order point to use when ordering from this replenishment source. For example, if this value is 75 it means that items below 75% of PAR Level will be ordered. If the value is 100, then anything under PAR Level is ordered (i.e., anything less than 100% of PAR Level).

Separate - Yes or No to specify whether a separate order is built for each PAR Location even though these orders are all going to the same source.

Sorting Capabilities

The default sort sequence for this report is the Replenishment **Source** name.

See [Sorting](#) for more information on sorting PAR Vision lists.

Borrow Card Registrations

This report gives you a list of all the Borrow Cards registered in the system and the location to which they are registered.

Data Fields

Card Number - This number is internally assigned by the system when the card is registered and represents the unique identifier for the Borrow Card.

Location - The PAR Location to which this card has been registered.

iButton - The iButton number on the Borrow Card.

Sorting Capabilities

The default sort sequence for this report is Card Number.

See [Sorting](#) for more information on sorting PAR Vision lists.

Unregistered iButton Touches

If there have been unregistered iButton touches in the past week, there are two screens that will help you diagnose and correct the problem.

The summary screen simply tells you the unregistered iButton serial number and the number of time it was touched. If you click on a button, the system will display the detail data related to the touches.

The detail screen is intended to provide you with sufficient information to identify the unregistered button so it can be properly registered.

Data Fields

Summary Screen

iButton - the serial number of the unregistered button.

Total Count - the number of time this button was touched in the past week.

Detail Screen

Date and Time - the date and time of one of the touches to the button.

Downloaded At - where the Touch Probe was downloaded with the unregistered button touch.

Located At - the location of the unregistered button (if that can be determined based on other button touches in the sequences).

Previously Registered As - if applicable, information about a previous registration of this same button.

Touched During - the process being performed when the button was touched (such as; dispense, reconciliation, etc.)

Patient or Department - if a related patient or department can be determined.

Item Touched Before - if another button was touched prior to this iButton in the sequence.

iButton Class - the type of iButton (such as; item, department, etc.)

Sorting Capabilities

Total Count is the default sort for the summary screen.

Date and Time is the default sort for the detail screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Item Reports

Item Reports

The topics in this section describe the Item reports that are available in the PAR Vision system. You can access these reports using the links in the Items (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Item reports include:

[Item Master](#)

[PAR Location Items](#)

[Item Classification](#)

[Vendor-Manufacturer Item Numbers](#)

[Accounting Codes](#)

[Lot/Serial Number Usage](#)

[Manufacturer Barcode Registrations](#)

[Items with \\$0 Cost](#)

[Item Day of the Week Usage Summary](#)

Item Master

The Item Master report shows detailed information about the items stored in the PAR Excellence inventory. Some of the Item master fields contain data that is common to all PAR Locations (such as, Item description) and some of the fields are used as the default value for the PAR Location when an item is added to the location (such as, the default Replenishment Source).

Selection Criteria

Consigned or Purchased - Select whether the report should contain only items that are on consignment from the manufacturer or purchased or both (default).

Item Number - Enter all, or any part, of an item number to filter the list.

Item Description - Enter all, or any part, of an item description to filter the list.

Vendor Number - Enter all, or any part, of a vendor/manufacturer's number to filter the list.

Item Type - Select the type of items to be displayed from the drop-down list.

- **All (default)** - Show all item types.
- **White** - Show only white-label items.
- **Blue** - Show only blue-label items.
- **PAR Bin** - Show only PAR Bin items.
- **W & B** - Show white-label and blue-label items (no PAR Bin items).
- **W & P** - Show white-label and PAR Bin items (no blue-label items).

- **B & P** - Show blue-label and PAR Bin items (no white-label items).

Apply Filter - After you have entered all your filter criteria, click the **Apply Filter** button to see the list of matching items.

Data Fields

Item Number - The PAR Excellence item number

Item Description - The item description.

Vendor Number - The vendor/manufacturer's number.

Item Type - The type of item.

- **White** - Show only white-label items.
- **Blue** - Show only blue-label items.
- **PAR Bin** - Show only PAR Bin items.

Charge - Y if the item is chargeable. Blank if it is non-chargeable.

Default Charge Code - The default charge code (if chargeable). Used if a different charge code is not entered for a PAR Location.

Patient Cost - The cost of this item to the Patient.

Item Cost - The hospital's cost for this item.

UISS - The default unit of issue for the item. Used if a different unit of issue is not entered for a PAR Location.

Factor - The number of issue units within each replenishment unit (the conversion factor).

UREP - The default unit of replenishment for the item. Used if a different unit of replenishment is not entered for a PAR Location.

Default Source - The default replenishment source for the item. Used if a different replenishment source is not entered for a PAR Location.

Source Bin - The location of the item at the replenishment source (if the source is internal to the hospital).

Consigned - Y if the item is on consignment from the vendor. Blank if the item is purchased.

Sorting Capabilities

Item Number is the default sort sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

Item Classification

This report shows items within a PAR Location (or group) that meet one of the classification specifications that you have defined in the PAR Excellence system.

Classification criteria is customizable for each PAR Excellence installation and it allows you to group together items with various characteristics. For example, you can set up a classification called "Expiring Items" and this report will show you all items in a location that meet that criteria (i.e., items that have an expiration date). Or, you could define a classification based on item cost, for example, all items with cost greater than \$1000. Maybe the prefix on the item number or vendor number has some special meaning in your system. You can set up a classification based on the first 2 or 3 (or whatever) characters in the item number.

The possibilities are endless. You can define a classification using any field, or group of fields, or partial field from the Inventory Master table, the PAR Location tables and the Replenishment Source table. Your PAR Excellence Account Manager or a Technical Support representative can work with you to define the classifications required at your installation.

Selection Criteria

PAR Location - Select a PAR Location or group, or all PAR Locations.

Classification - Select one of the classification specifications that have been defined for you installation. These classifications can be defined using the core PAR Excellence system with help from your Account Manager or Technical Support representative.

Item Type - You can display only White label items that meet the criteria, only Blue label items or only PAR Bin items.

Update Output - After you have entered all your criteria, click the **Update Output** button to see the list of matching items.

Data Fields

PAR - The PAR Level for the item at the location.

QOH - The current quantity on hand for the item at this location.

Shelf Location - The location of the item within the PAR Location (if you have done shelf registration at the location).

PAR Location - The name of the PAR Location.

Vendor/Mfg Num - The vendor/manufacturer's number.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Repl. Source - The replenishment source for the item.

Charge - Y if the item is chargeable. Blank if it is non-chargeable.

Sorting Capabilities

Item Number is the default sort sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Location Items

This reports lets you select a PAR Location and see all the items stocked at that location with all the *PAR Location specific* information about the item.

Selection Criteria

PAR Location - Select the PAR Location to be viewed.

Data Fields

Item Number - The item number.

Item Description - The item description.

Type - The item type (white or blue).

PAR Level - The PAR Level for this item (at the selected location).

Crit. Level - The critical alert level for the item.

UISS - The unit of issue for the item (i.e., the unit of measure dispensed to a patient).

UREP - The unit of replenishment (i.e., the restocking unit of measure).

Charge? - If the item is chargeable there will be a **Y** in this column.

Charge Number - If the item is chargeable this is the charge code that is passed to the patient charge system.

Bin Location - The location of this item at this PAR Location. This is sometimes referred to as the shelf location and is normally populated when you do a Shelf Registration.

Replenish Source - The replenishment source for the item.

Req. Qty - The default requisition quantity for a blue item.

Req. Bin - The location of the item in the replenishment location. This is normally used for items that are replenished from the hospital central supply location and can be printed on the pick ticket to help find the item when picking items to restock a location.

Expense Code - The expense code for the item.

Revenue Center - The revenue center for the item.

Revenue Code - The revenue code for the item.

Sorting Capabilities

Item Number is the default sort sequence for this report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Vendor-Manufacturer Item Numbers

This report shows the Vendor/Manufacturer number for the items in the PAR Excellence system. This same information is available on other reports in PAR Vision (such as, the Item Master report) but this report is easier to use if you are only interested in Vendor/Manufacturer Number because it displays a very limited amount of information. In addition, if you have assigned Vendor/Manufacturer names to each of your items, you can filter this report by a name (i.e., see only Vendor/Manufacturer Numbers for a specific vendor).

Selection Criteria

PAR Location - Select a PAR Location or All Locations. If you select a PAR Location (or Group) it will show only the Items stocked at that location (or locations).

Item Number or **Item Description** - Use these boxes to enter a specific Item Number (or Description) to see the Vendor/Manufacturer information.

Vendor/Manufacturer Name - use *Any/Unnamed Vendor/Mfg* to see all items in the Item Master or select a specific Vendor to see just items from that Vendor. In order to use this feature you must have Vendor Manufacturer Names assigned for each item in the Item master. These values can be assigned using the Item Master Maintenance utility.

Data Fields

Vendor/Mfg Number - The Vendor/Manufacturer Number for the item (if one has been assigned).

Vendor/Mfg Name - The Vendor/Manufacturer Name for the item (if one has been assigned).

Item Number - The Item master number for the item (usually assigned in the hospital MMIS system).

Item Description - The description of the item.

Sorting Capabilities

The default sort sequence for this report is Vendor/Mfg Number.

See [Sorting](#) for more information on sorting PAR Vision lists.

Lot/Serial Number Usage

This report can be used to look up item usage information by the manufacturer's lot number or serial number. The selection criteria for the report is designed to let you find one or more items from a specific lot or serial number.

The PAR Excellence system will only capture this information if you dispense the items using a scanner (versus a touch probe) and the items have been specifically configured to require the scanning of this information in addition to the item number. These capabilities are usually only configured for procedural areas, such as, Cath Labs and Operating Rooms.

An item can be set up to require up to three additional scans (after the item number scan) to capture Lot Number, Serial Number and Expiration Date. The allowable combinations are as follows:

1. Lot Number (only)
2. Lot Number and Serial Number
3. Expiration Date
4. Expiration Date and Lot Number
5. Expiration Date, Lot Number and Serial Number

After scanning the item number the scanner will sound additional beeps indicating the number of additional scan required. The scanner display will also display the next bar code expected (for example, the scanner display will say "**Lot Next**" when the next expect scan is a Lot Number. Scan types 1, 2, 4 and 5 will result in information being captured in this report.

Selection Criteria

PAR Location - Select the PAR Location where the item was dispensed or use *All PAR Locations* to see data from multiple locations.

Replenishment Source - Select the Replenishment Source that supplied the item or use *All Sources* to see items from multiple replenishment sources.

Start Date/Time - Enter the earliest date and time that the item would have been dispensed.

End Date/Time - Enter the latest date and time that the item would have been dispensed.

Lot/Serial Number - If you are looking for a specific Lot or Serial number, enter the value here. You can also enter a partial number to find all items containing the string entered.

Item Number - If you are looking for a specific Item, enter the item number or description.

Item Description - If you are looking for a specific Item, enter the item number or description.

Patient Number - If you are looking for an item that was dispensed to a specific patient, enter the patient account number or name.

Patient Name - If you are looking for an item that was dispensed to a specific patient, enter the patient account number or name.

 For the Item Number, Item Description, Patient Number and Patient Name, the program will "prompt" you through your selection. As you type in the field, the list will be filtered down to contain only items with the prefix entered so far. At any time you can make a selection from the list to select that entry.

Data Fields

Date/Time - The date and time the item was dispensed.

Lot/Serial Number - The Lot or Serial number for the item.

Lot or Serial - The word **Lot** or **Serial** indicating the type of number in the Lot/Serial Number column.

 When both Lot and Serial number are required, PAR Excellence will assume the first scan is the Lot Number and the second scan is the Serial Number.

Item Number - The item number that was dispensed.

Item Description - The description of the item that was dispensed.

Patient Number - The patient account number of the patient to whom the item was dispensed.

Patient Name - The name of the patient to whom the item was dispensed.

Credit - The word **Credit** if this was a credit instead of a dispense.

Qty. - The quantity of the item dispensed (or credited). If this is a credit the number will be negative.

Replenishment Source - The Replenishment Source that supplied the item.

PAR Location - The location where the item was dispensed.

Sorting Capabilities

Date/Time is the default sort sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

Accounting Codes

This report displays the important accounting codes that are defined in the system. The most widely used of the accounting codes is the Patient Charge code (which is included) but the report also includes the other lesser used codes that can be defined in the system.

Selection Criteria

PAR Location - Select a PAR Location (or Group) or All Locations.

Item Type - Click the button to specify the type of items you want to see in the report (white items, blue items or both).

Data Fields

PAR Location - the name of the PAR Location where the item is stocked.

Type - The type of item. White items have an iButton (or barcode) and every time an item is dispensed the button is touched with a probe (or scanned) to tell the system to decrement inventory. Blue items are *not* touched on every dispense. The quantity on hand (or the quantity to order) is determined based on a blue item requisition or it is calculated by the system based on the weight of the item (if the item is attached to a PAR Bin scale).

Item Number - The item number.

Item Description - The description of the item.

Charge Code - The patient charge code for this item.

Charge - The column will contain a **Y** if the item is chargeable or blank if it is non-chargeable. If this column contains a Y there should also be a charge code in the Charge Code column. If these two columns are not in sync you can use the [Chargeable Items without Charge Codes](#) function to correct the problem.

Expense Code - The expense code assigned to the item.

Revenue Center - The revenue center assigned to the item.

Revenue Code - The revenue code assigned to the item.

Sorting Capabilities

The default sort sequence for this report is **PAR Location**, **Item Type** and **Item Description**. This will display all white items in a location first (ordered by item description) then the blue items (also in item description sequence).

See [Sorting](#) for more information on sorting PAR Vision lists.

Manufacturer Barcode Registrations

If you dispense items using a barcode scanner, PAR Excellence provides the flexibility to dispense by scanning the barcode generated by PAR Excellence or the barcode that is affixed to the package by the manufacturer. In order for the system recognize the barcodes on the packaging you must first register those barcodes with the system.

This report is used to view the items in a location with manufacturer barcode registrations.

Selection Criteria

PAR Location - Select a PAR Location or group, or all PAR Locations.

Registrations or **All** - Select the option to see only items that currently have manufacturer barcodes registered or to see all items at the location (including those that have not had a package barcode registered).

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Barcode - The manufacturer barcode value that was registered for this item. If you have selected All Items and this field is blank, the item does not have a manufacturer barcode registered.

Lot Code - Y if the item requires a Lot Code to be scanned when it is dispensed.

Serial Number - Y if the item requires a Serial Number to be scanned when it is dispensed.

Expiration - Y if the item requires an Expiration Date to be scanned when it is dispensed.

Sorting Capabilities

Item Number is the default sort sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

Items with \$0 Cost

This screen displays items in inventory that have zero as a cost value. This generally is the result of improperly setting up the item in the Item Master table. Many of the PAR Vision reports do analysis based on usage and cost, so it is important to properly record the cost of all items, otherwise, your reports are not showing accurate information.

You can set the item cost using the PAR Excellence functions that maintain the Item Master table.

Selection Criteria

Par Location - The PAR Excellence item number.

Item Type -The type of item to be included in the display. The choices are:

- While Items - White-label items.
- Blue Items - Blue-label items.
- PAR Bins Items - Items which are stocked in PAR Bins.

Data Fields

Item Number - The PAR Excellence item number.

Item Description -The description of the item.

Cost - On this screen, this value will always be \$0.00.

Sorting Capabilities

Item Number is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Item Day of the Week Usage Summary

This screen shows average and maximum issues and receipts for an item by day of the week. You can use this information to schedule ordering to insure that stock is available on the days it is most often needed.

Data Fields

The message above the table tells you the item and PAR Location that was selected from the detail screen.

Average Issued - The average quantity issued for this item on each day of the week.

Maximum Issued -The maximum quantity that has been issued for this item for each day of the week.

Averaged Received - The average quantity received for this item on each day of the week.

Maximum received - The maximum quantity that has been received for this item for each day of the week.

Activity and History Reports

Activity and History Reports

The topics in this section describe the Activity and History reports that are available in the PAR Vision system. You can access these reports using the links in the Activity/History (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Activity and History reports include:

[Activity Detail](#)

[Patient History](#)

[Bed History](#)

[Item History](#)

[Department Transactions](#)

[Transfer-Inventory Transactions](#)

[HIPAA System Activity](#)

[Item Update Interface History](#)

Activity Detail

This is a detailed listing of all Activity tracked by the PAR Excellence system. You can use this report for a variety of reasons, including:

- To create an audit log of activity for a day at a PAR Location.
- Searching for one or more transactions while researching a problem with a patient.
- Looking for all activity against an item at one or more PAR Locations.
- To get a list of activity against a specific bed.

This report is generally used by the Materials Management staff in support of researching a problem or to get a comprehensive list of activity at a location. Upper level management personnel will generally find that other PAR Vision reports, which summarize these transactions into much higher level categories, to be more useful.

Because of the volume of data contained in the transaction log, it is recommended that you limit your Selection Criteria to a very short period of time and be as specific as possible with your selection criteria.

Selection Criteria

PAR Location - Select a Par Location of All PAR Locations.

Item Type

- Chargeable - Show transactions involving chargeable items only.
- Non-Chargeable - Show transactions involving non-chargeable items only.
- Both - Show transactions for all items.

Transaction Type

- Patient Admits, Discharges, Transfers - Include transactions that show Patient ADT.
- QOH Adjustments - Include transactions that show adjustments to quantity on hand.
- Receipts (Replenishment) - Show white-label item receipt transactions.
- Blue-Label Requisitions - Show Blue-Label item requisitions.

 Item issues (dispenses) and credits are always included automatically.

Start Date - Enter the date to start searching for transactions.

End Date - Enter the date to stop searching for transactions.

 Because of the potentially high volume of data, this screen lets you start and end your search at a specific hour and minute of a day. Also, you can use the calendar pop-up to select your date by clicking on the calendar icon .

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

Average Items/Patient and **Average \$/Patient** - These figures are calculated based on the selection criteria entered above. You can use this information to compare these data points for different locations and/or different time frames.

Date and **Time** - The date and time of the transaction.

Patient - If the transaction involved a patient, this is the patient name and/or number. The PAR Vision administrator can setup the patient name format. If the transaction was for a department (versus a patient), this field will contain the work Department.

 Because the patient name is sensitive information, the administrator can stipulate that a user is not authorized to view the patient name. If this is the case, the name field will be blank even if a patient was involved in the transaction.

Activity - The type of activity.

- **Adjustment** - An adjustment to quantity on hand.
- **Credit** - Item credited to a patient (or department).
- **Dispense** - Item was dispensed to a patient (or department).
- **Event** - A patient event (other than a procedure).
- **Into Bed** - A patient was placed into a bed.
- **Out of Bed** - A patient was moved out of a bed.
- **Patn Nbr Chng** - The patient number was changed.
- **Procedure** - A procedure was performed on a patient.
- **Received** - An white-label item was received into inventory.

- **Requisition** A blue-label item was requisitioned.
- **Resupply Loc.** - Inventory was sent from the central supply area to a PAR Location.
- **Pendg Assign** - A pending transaction was assigned to a patient (or department).

Bed - The bed number for the transaction (if applicable).

Qty - The quantity of the transaction.

UISS - The unit of measure related to the quantity in the previous column. In this report all quantities are report in the issue unit of measure.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Charge - Y if the transaction is chargeable, N if it is not chargeable, blank if Charge/Non-Charge is not applicable to this transaction.

PAR Location - The PAR Location.

Employee - The person who performed the transaction. This will only be displayed if you are capturing the employee ID along with the transaction.

Sorting Capabilities

Date and **Time** is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Patient History

This report gives you a history of patients in and out of the hospital. You can also drill-down on a patient to see the detail transactions involving the patient.

Selection Criteria

PAR Location - Enter all or part of a PAR Location.

Patient Name - Enter all or part of a Patient Name.

Patient Number - Enter all or part of a Patient Number.

Admit - Enter a date to see all Patients admitted on that date.

Discharge - Enter a date to see all Patients discharged on that date.

Apply Filter - After entering a value in any, or all, of the fields above, click the **Apply Filter** button to get the list of matching Patients.

Data Fields

PAR Location - The PAR Location that is primarily providing supplies to the patient.

Patient Name - The patient name.

Patient Number - The patient number.

Admit - The date the patient was admitted into the hospital.

Discharge - The date the patient was discharged from the hospital.

Sorting Capabilities

Patient Number is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a Patient to see the [Patient History Details](#) screen for that patient.

Patient History Details

This screen is similar to the [Activity Detail](#), however, it is focused on only the transactions that apply to the Patient selected on the [Patient History](#) summary screen.

Data Fields

The **Patient Number** and **Patient Name** are displayed at the top of the screen.

Date and **Time** - The date and time of the transaction.

Transaction - The transaction type.

- **Credit** - Item credited to a patient (or department).
- **Dispense** - Item was dispensed to a patient (or department).
- **Event** - A patient event (other than a procedure).
- **Into Bed** - A patient was placed into a bed.
- **Out of Bed** - A patient was moved out of a bed.
- **Patn Nbr Chng** - The patient number was changed.
- **Procedure** - A procedure was performed on a patient.

Bed - The bed involved (if applicable)

Qty - The quantity of the transaction.

Item Number - The item number for the transaction.

Item Name - The item description.

PAR Location - The PAR Location where the item was stocked.

Charge? - Y if the item was chargeable, blank if it was non-chargeable.

Sorting Capabilities

Date and Time are the default sort fields for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Bed History

The bed history report shows all items dispensed to the various patients assigned to a specified bed over a selected date range. This information can be useful if you are trying to resolve a lost charge or incorrect charge to a patient. This report will not only tell you which patient was in the bed at a certain time but the other items dispensed to that patient at that same time.

Selection Criteria

Bed Name - The name of the bed to analyze. This information must be provided (i.e., there is no "all beds" option). Click in the field to see a list of bed names and then choose the desired bed.

Start Date/Time - The starting date and time for the analysis.

End Date/Time - The ending date and time for the analysis.

Data Fields

Date/Time - The date and time of the activity for this bed.

Patient - The name of the patient in the bed at that date and time. If the patient name is not displayed you may not be authorized to see patient names on the reports. If you need to see the patient name talk to your PAR Vision administrator to have your user profile changed.

Activity - The activity for the associated item (Dispense or Credit).

Qty - The quantity of the items dispensed or credited.

Item Number - The item number for this transaction.

Item Description - The description of the item.

Charge? - If the item was chargeable this column will contain a **Y** otherwise it will be blank.

Sorting Capabilities

The default sort sequence for this report is **Date/Time**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Item History

This activity detail for an item within a specified date range. This is a comprehensive list of everything that has happened to this item during the period. This list is very useful in diagnosing inventory problems at a location.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Number - Enter the PAR Excellence item number for the history to be displayed.

Item Description - Enter an item description for the history to be displayed.

i For both the Item Number and Item Description, the program will "prompt" you through the selection of an item. Begin typing in the box and the program will display a drop-down list of items that begin with the number or description. As you continue to type, the list will be filtered down to contain only items with the prefix entered so far. At any time you can make a selection from the drop-down list to select that item.

YOU MUST SELECT AN ITEM TO RUN THIS REPORT.

Start Date and Time - Enter the date and time to start searching for transactions.

End Date and Time - Enter the date and time to stop searching for transactions.

i Because of the potentially high volume of data, this screen lets you start and end your search at a specific hour and minute of a day. Also, you can use the calendar pop-up to select your date by clicking on the calendar icon .

Activity Type - Select whether you want to see all activity or only quantity on hand adjustments.

Update Output - After you have entered or changed your Selection Criteria, click the Update Output button to refresh the screen.

Data Fields

Date and Time - The date and time of the transaction.

Activity - The transaction type.

- **Adjustment** - An adjustment to quantity on hand.
- **Credit** - Item credited to a patient (or department).
- **Dispense** - Item was dispensed to a patient (or department).
- **Received** - An white-label item was received into inventory.
- **Requisition** A blue-label item was requisitioned.
- **Resupply Loc.** - Inventory was sent from the central supply area to a PAR Location.
- **Pendg Assign** - A dispense transaction is pending assignment to a patient (or department).

Qty - The quantity of the transaction.

Bed - The bed involved in the transaction (if applicable).

Patient - The patient involved in the transaction (if applicable).

i Because the patient name is sensitive information, the administrator can stipulate that a user is not authorized to view the patient name. If this is the case, the name field will be blank even if a patient was involved in the transaction.

PAR Location - The PAR Location where the activity took place.

Sorting Capabilities

Date and **Time** are the default sort fields for this report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Department Transactions

This report is similar to the [Activity Detail](#) report but it allows you to focus on transaction that were issued or credited to a Department.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Type:

- **Chargeable** - Show transactions involving chargeable items only.
- **Non-Chargeable** - Show transactions involving non-chargeable items only.
- **Both** - Show transactions for all items.

Start Date - Enter the date to start searching for transactions.

End Date - Enter the date to stop searching for transactions.



You can use the calendar pop-up to select your date by clicking on the calendar icon .

Data Fields

Used By - The department involved.

Date and **Time** - the date and time of the transaction.

Activity - The type of activity.

- **Credit** - Item credited to a department.
- **Dispense** - Item was dispensed to a department.

Qty - The quantity of the transaction.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Total Cost - The cost of the transaction.

Dispensed From - The PAR Location where the item was stocked.

Bed - The bed number involved in the transaction (if applicable).

Sorting Capabilities

Date and **Time** (descending) is the default sort field for this report. This put the most recent transactions at the top of the screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Transfer-Inventory Transactions

This report shows the inventory transfer activity between locations. Inventory can be transferred from one location to another using the **Transfer Inventory Between Locations** function in PAR Client (i.e., the PAR Excellence foreground software).

Selection Criteria

Par Location - Select a PAR Location (or Group) or All Locations to see transfer transactions where a specific location(s) is involved in the transfer (either the from location or the to location).

Item Number or **Item Description** - Click in one of these boxes to enter an item number or item description to see only transfer transactions involving a single item.

Start Date/Time - Enter the start date and time for the analysis.

End Date/Time - Enter the ending date and time for the analysis.

Data Fields

Date/Time - The date and time of the transfer activity.

Item Number - The item number that was transferred.

Item Description - The description of the item that was transferred.

From Location - The location from which the item was transferred.

Quantity - The quantity (and unit of measure) of the item transferred.

To Location - The location that received the item in the transfer.

Quantity - The quantity (and unit of measure) of the item received into the “to” location. This may differ from the quantity if the units of measure in the “from” location and the “to” location do not match.

Cost - The cost of the item if you have item cost information loaded in your Item master table.

Sorting Capabilities

The default sort sequence for the report is the **Date/Time** of the transfer.

See [Sorting](#) for more information on sorting PAR Vision lists.

HIPAA System Activity

You can use this report to see all user related activity that has occurred in the PAR Excellence system over a period of time. The specific purpose of the report is to satisfy Health Insurance Portability and Accountability Act (HIPAA) regulations that require the protection and confidential handling of protected health information. This report satisfies those requirements by tracking all activity in the

system including additional information for functions that include the manipulation of patient information.

This report is a very useful tool when trying to determine the source of a change made in the system which may be causing different or incorrect results. The information on the report is even more valuable if you use the PAR Excellence security system which requires each user to log-on with a unique user name and password. You can then see exactly when each function was used and who used the function.

Selection Criteria

User - You can look up activity for a specific user or leave this box blank to see activity for all users. This field is only applicable if you have PAR Excellence security activated.

Patient - You can look up activity related to a specific patient (by patient number or patient name) or leave this box blank to see all activity. If you select a patient you will only see patient specific functions in the report. If you leave the field blank you will see all functions whether patient information is included in the function or not. For example, if you select a patient you will not see activity related to the inventory manipulation.

Event - You can select All Events, or All Patient Access Events or you can choose a specific event from the list.

Function - You can choose All Functions or a specific function.

Start Date/Time - Enter the starting date and time for the analysis.

End Date/Time - Enter the ending date and time for the analysis.



You will notice that PAR Vision functions are only tracked if the corresponding report contains patient information. This is done intentionally to limit the number of entries in the report while at the same time complying with HIPAA regulations. All functions from the PAR Client (foreground) system are tracked since this is generally a manageable number of transactions and it provides valuable information especially in regard to changes that have been made in the system.

Data Fields

Date - The date the activity occurred.

Time - The time the activity occurred.

User - The user who performed the activity (if it can be determined).

Computer - The computer on which the activity occurred (if it can be determined).

Patient - If the function was performed on a specific patient (for example, if you drill-down in Patient History on a specific patient) the patient name will be listed in this column.

Event - The event related to the activity. Every activity has an associated event. It is the action taken by the user to cause the activity to be logged. For example, "function initiated" or "Log on", etc.

Menu Function - The specific function related to the event. Not every activity will have an associated function. For example, there is not function related to the "Log on" event.

Note - This is additional information related to the activity. Sometimes this is additional information related to the user who performed the activity or computer on which the activity was performed. Other times this column might contain a "parameter" that was passed into the function. Generally, This information will not be of great value to most people, however, some Super Users and the PAR Excellence Technical Support staff may be able to extract valuable information from the Note.

Sorting Capabilities

The default sort sequence for this report is **Date/Time**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Item Update Interface History

This report will be available if your hospital uses the Item Master Interface feature in PAR Excellence. If you use this interface, when updates are made to the Item table in your MMIS system, those updates are automatically sent over the interface and automatically applied to the PAR Excellence Item Master table. This reduces your maintenance burden and keeps the PAR Excellence system in sync with your corporate MMIS system.

The report shows you what updates have been applied by the interface program showing both the new updated value and the old value that was in the field (prior to the update). You can review this report to see what has been changed in PAR Excellence and, possibly, spot updates that were made incorrectly in you MMIS item table (i.e., a value that was changed that should not have been).

Selection Criteria

PAR Location - Select a PAR Location (or Group) or All Locations. You can use this selection to see only the updates applied to items in a specified location. This selection is only applicable if you have configured your item Master Update interface to "push" updates down to the items at the PAR Locations.

Start Date - Enter the starting date for the analysis.

End Date - Enter the ending date for the analysis.

Include Additions/Deletions/ Updates/ Errors - Check the boxes to specify the type of updates you want to analyze.

Data Fields

Date/Time - The date and time the update was applied. Typically, the item master Update is run once a day at a specific time

PAR Location - The PAR Location that was specifically affected by the Item Master change. This information is only applicable if you have configured your item Master Update interface to "push" updates down to the items at the PAR Locations.

item Number - The item number that was updated.

Item Description - The description of the item that was updated.

Explanation - The update that was applied.

Requested Value - The new value for the field that was updated (or the Item number that was added or deleted).

Original Value - The old value for the field that was updated (if applicable).

Sorting Capabilities

The default sort sequence for this report is **PAR Location** (if applicable) and **Date/Time** within PAR Location.

See [Sorting](#) for more information on sorting PAR Vision lists.

Quantity On Hand Reports

Quantity On Hand Reports

The topics in this section describe the Quantity on Hand reports that are available in the PAR Vision system. You can access these reports using the links in the Quantity on Hand (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Quantity on Hand reports include:

[Critical items](#)

[Quantity On Hand](#)

[Low Stock](#)

[PAR Stock Value](#)

Critical items

This screen shows items with quantity on hand at or below the critical inventory level.

Data Fields

PAR Location - the PAR Location where the item is stocked.

Item Number - the item number.

Item Description - the description of the item.

Replenishment Source - the vendor (or location) that supplies the item.

Critical Level - the critical inventory level.

Current QOH - the current quantity on hand.

On Order - the quantity for this item currently on order.

Back-Ordered - the quantity for this item currently on back-order.

Critical Index - a measure of HOW critical – the higher the number, the greater the “degree of criticality”.

Sorting Capabilities

Critical Index is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Low Stock

The information on the report is similar to the [Quantity On Hand](#) report with an added feature that lets you look at only those items that are at or below a certain percentage of PAR Level. Use the report to get a quick snapshot of all items that have "low stock" based on a percentage of PAR.

The report also contains several useful columns related to Orders, including an Order Preview column that shows you exactly what would be ordered (based on the normal ordering logic) if you were to run an order right now.

Selection Criteria

PAR Location - Select a PAR Location (or group) or All Locations.

Percentage of PAR - Enter a value between 0 and 100 indicating the percentage of PAR Level you consider "low stock". For example, enter 20 to see all items that have quantity on hand 20% or lower than the PAR level for the item (in this example, if an item has PAR level of 100 and the current quantity on hand is 15, it will appear on the report).

Data Fields

PAR Location - The name of the PAR Location.

Item Number - The item number.

Item Description - The description of the item.

Replenishment Source - The replenishment source for this item (at this location).

PAR Level - The PAR level for the item.

Critical Level - The critical level for the item.

Current QOH - The current quantity on hand for the item at this location.

Percent - The percentage of PAR Level the current quantity on hand represents. This will be some number less than the number you enter in the selection criteria.

UISS - The unit of issue for this item at this location.

Per - The factor between the unit of issue and the unit of replenishment (for example if the item is issued by EA and replenished by BOX and there are 12 in a box, this number will be 12).

UREP - The unit of replenishment for the item at this location.

ROP - The re-order point for the item at this location.

Order Preview - The quantity of this item that would be ordered if you ran an order right now.

On Order - The quantity of this item that is already on an open order.

Back-ordered - The quantity of this item that has been back-ordered by the vendor.

Sorting Capabilities

The default sort sequence for this report is **PAR Location** and **Percent** within PAR Location (descending). This shows the items with the lowest stock at the top of the list for each location.

See [Sorting](#) for more information on sorting PAR Vision lists.

Quantity On Hand

This report shows on hand quantities for all items at one or more PAR Locations. In addition, the screen shows PAR Level and quantity on order with indicators to show items that are below PAR Level and/or below critical level so you can quickly see what items should be ordered for a location.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Number - Enter a PAR Excellence item number to display the quantity on hand information for a single item.

Item Description - Enter an item description to display the quantity on hand information for a single item.

 For both the Item Number and Item Description, the program will "prompt" you through the selection of an item. Begin typing in the box and the program will display a drop-down list of items that begin with the number or description. As you continue to type, the list will be filtered down to contain only items with the prefix entered so far. At any time you can make a selection from the drop-down list to select that item.

Data Fields

A message is displayed at the top of the list that tells you the number of open orders for this location. This lets you see at a glance if there are any items on order. You can find the specific item that are on order by looking in the QOO column of the detail report.

PAR Location - The PAR Location.

Item Number - The PAR Excellence item number.

Item Description - The item description.

QOH - The quantity on hand for this item at this location.

PAR Level - The PAR Level for this item at this location.

ROP - The re-order point for the item.

QOO - The quantity on order.

Crit Level - the critical level for the item.

Item Cost - The hospital's cost for this item (based on the unit of issue).

QOH Value - The value of the inventory currently at this location (quantity on hand time Item Cost).

UISS - The issue unit of measure.

Per - The conversion factor from the replenishment unit of measure to the issue unit of measure.

UREP - The replenishment unit of measure.

 The three fields above (**UISS**, **Per** and **UREP**) are displayed to help you calculate what the quantity on hand will be when the quantity on order is received. If the Per value (the conversion factor) is 1, then you can simply add QOO to QOH. If the UISS and UREP are

different, then the Per field tells you how many units of issue are in each unit of replenishment.

Quantity Indicators - These field are intended to give you a quick indication of the status of the quantity field (without adding and comparing number). Each field will contain a less than sign (<) or greater than (>) sign indicating how the values relate.

- **O+Q less than P** - A less than sign (<) means that on order plus the quantity on hand is still less than the PAR Level. A greater than sign (>) or blank means that once the order is received, inventory will be back to PAR or above.
- **Q not equal to P** - A less than sign (<) means that the quantity on hand is less than the PAR Level. A greater than sign (>) means the item is over PAR Level. Blanks indicates the item is at PAR Level.
- **Q less than or equal to C** - A less than sign (<) means that the quantity on hand is less than the Critical Level.

 You can use the PAR Vision sorting capabilities to quickly see items with quantity on hand problems. For example, sort the last column of the report (descending) to get all items with quantity on hand less than the critical level grouped at the top of the report.

Bin Location - The shelf location of this item at the PAR Location. This value is normally (normally) populated when you do a shelf registration of the location.

Sorting Capabilities

Item Description is the default sort field for this screen, however, you can create much more useful grouping by sorting on other columns. Also, don't forget about the "multi-column" sorting capabilities.

See [Sorting](#) for more information on sorting PAR Vision lists.

Negative Quantity on Hand

This screen shows items where the quantity on hand is less than zero. This should never happen and, therefore, should be corrected as soon as possible. There are various reason why this might occur, however, the most common reason is stock being placed into inventory without following the proper receiving procedures in the PAR Excellence system.

If you can determine the reason for the problem it is best to correct it using proper system procedures (for example, recording an item receipt using the Receiving function). If it is not possible to correct the problem using normal procedures, then the item should be reconciled to record the correct quantity on hand.

Data Fields

PAR Location - the PAR Location where the item is stocked.

Item Number - the item number.

Item Description - the description of the item.

QOH - the current quantity on hand (which is a negative number).

Sorting Capabilities

QOH (quantity on hand) is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Stock Value

This report gives you a snapshot of the value of the inventory in the hospital. You can use this report to see which locations in the hospital have the highest inventory values or which items throughout the hospital have the highest inventory values.

Selection Criteria

PAR Location - Select a PAR Location to be analyzed. You can also select a Group of locations or All Locations.

Level of Detail - Select one of these options to indicate the level of detail you want to see in the report.

- **Detail** - This option shows each item and its value at each PAR Location (selected).
- **Summary by Location** - Use this option to see the total value of all items at the selected locations.
- **Summary by Item** - This option will show you the value for each item across all selected locations.

Item Type:

- **Chargeable** - Show inventory value for chargeable items only.
- **Non-Chargeable** - Show inventory value for non-chargeable items only.
- **Both** - Show inventory value for all items.

Data Fields

PAR Location - The name of the PAR Location. If one of the summary options is selected, this could also be the name of a Group or All Locations.

PAR Value - The value of the item (or items) at full PAR Level.

QOH Value - The value of the item (or items) based on the current quantity on hand.

 If you have selected the option for **Summary by Location** then only the three values above will be displayed (because all the items have been summarized together and there is no specific item detail data to be displayed).

Item Cost - The cost of the item from the Item Master file. This is the cost of the item to the hospital (not necessarily what the patient is charged).

UISS - The unit of issue for the item.

QOH - The Quantity on Hand for the item. If you are using the **Summary by Item** option this will be the total QOH for the item at all selected locations.

Q>P - If the Quantity on Hand for the item is greater than the PAR level there will be a **Y** in this column. This lets you quickly see where you can reduce inventory value by reducing stock to the prescribed PAR Level.

PAR Level - The PAR Level for the item. If you are using the **Summary by Item** option this will be the total PAR Level for the item at all selected locations.

Consign - If this is a consignment item there will be a **Y** in this column.

Item Number - The item number.

Item Description - The item description.

Item Type - The type of item (white or blue).

Charge - If this is a chargeable item there will be a **Y** in this column.

 If you have selected the option for **Summary by Item** the report attempts to summarize the **QOH** and **PAR Level** for each item (for all selected locations). If, however, the Unit of Issue (UISS), Item Type and/or Charge flag differs from location to location, the report will be unable to do the summarization and the item will be reported on multiple lines of the report.

Sorting Capabilities

PAR Location and **Item Number** (within the location) is the default sort sequence for this report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Order Reports

Order Reports

The topics in this section describe the Order reports that are available in the PAR Vision system. You can access these reports using the links in the Orders (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Order reports include:

[Existing Orders](#)

[Existing Order Details](#)

[Items on Open Orders](#)

[Open Orders for Item](#)

[Order Preview](#)

[Receipts by Location](#)

[Order Fill Summary](#)

[Order Fill Line Items](#)

[Order Completion Times](#)

Existing Orders

You can use this function to find and review inventory orders that were created in the PAR Excellence system.

Normally, you will only be interested in Open Orders so you can see what is on order but not yet received. You may also at times want to look at closed orders to check or verify something on the order.

Remember that closed Orders are purged from the system after a period of time, so you may not always be able to find the order you are searching for if the order was placed a long time ago.

Selection Criteria

Order Type

- **Open orders** - only open orders are displayed (default).
- **All orders** - all order that have not been purged from the system are displayed.

PAR Location - Select a PAR Location or All PAR Locations.

Replenishment Source - Select a replenishment source to see only orders for that source.

Start and End - You can enter (or select from the calendar) the starting and ending dates for the orders to be displayed. The default is the previous seven days.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

Date and Time - The date and time the order was placed.

PAR Location - The PAR Location that placed the order.

Replenishment Source - The replenishment source for the order.

Order Number - The order number (generated by the system when the order was placed).

Order Type - The type of build that was done to create the order.

- **Full** - a full order build was used to create the order.
- **Critical** - the Build Critical order was used to create the order.
- **Selective** - the order was built with the Selective Order program.

Item Type - The type of items requested when the order was built.

- **Both** - both white-label and blue-label items were requested.
- **White** - only white-label items were requested.
- **Blue** - only blue-label items were requested.

Order Status - The current status of the order.

- **Built** - The order was built but has not been extracted and sent to the replenishment source.
- **Extracted** - The order has been extracted and sent to the replenishment source.
- **Receiving** - The order has been partially received but there are still open items on the order.
- **Backordered** - All items on the order have been backordered.
- **Closed** - There are no open items to be received and the order is closed.

Open Items - The number of line items that are still open on the order.

Times Sent - Times the order was sent to the replenishment source. A value of zero indicates you are printing orders and sending them to the source manually. If the system is automatically sending orders to a source, this number is incremented each time the order is sent.

Sorting Capabilities

Date and Time (descending) are the default sort fields for this screen. This displays the newest orders first.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an order to see the [Existing Order Details](#) screen for that order.

While you are viewing Open Orders there will be a button in the top right corner of the screen called **Search by Item** . Click this button to go to the [Items on Open Orders](#) screen. Once you are in the Items by Open Orders screen, you can drill-down to the [Open Orders for Item](#) screen.

Existing Order Details

Shows the line items on an order.

Data Fields

Open Order Details

Item Number - The PAR Excellence item number.

Item Description - The item description.

Unit Rep. - The unit of measure being ordered.

On Order - The number of units that are still on order.

Received - The number of units received so far.

Backordered - The number of units backordered.

Total Qty Open - The quantity of this item still open on this order.

Closed Order Details

Item Number - The PAR Excellence item number.

Item Description - The item description.

Unit Rep. - The unit of measure being ordered.

Original Order Qty - The number of units that were originally ordered.

Qty Received - The number of units received.

 The quantity received can differ from the original order quantity as a result of adjustments to the order or closing an order before all items are received.

Sorting Capabilities

Item Number is the default sort field for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Items on Open Orders

This screen is displayed when you click the **Search by Item**  button on the menu bar in the [Existing Orders](#) function. The screen shows all of the items in the system that currently appear on an open order. You can use this screen to determine if a specific item is currently on order and, if so, which order(s) it is on and the status of the order(s).

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations. The selection will be pre-set to the PAR Location you selected on the Existing Orders screen.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Order with Item - The number of open orders that contain this item.

Total Qty Open - The total quantity of this item that is still open (on all orders on which it is contained).

Sorting Capabilities

Item Number is the default sort field.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on an item to see the [Open Orders for item](#) report where you can see the orders that contain this item (and are still open).

Open Orders for Item

This screen is displayed when you drill-down from the [Items on Open Orders](#) screen. It shows all the orders that contain the selected item. You can now use the [Existing Order](#) function to see the full detail for the order.

Data Fields

Date and Time - The date and time the order was placed.

PAR Location - The PAR Location that placed the order.

Replenishment Source - The replenishment source for the order.

Total Qty Open - The quantity of the selected item still open on this order.

Unit Rep. - The unit of measure that was ordered.

Order Number - The order number (generated by the system when the order was placed).

Order Type - The type of build that was done to create the order.

- **Full** - a full order build was used to create the order.
- **Critical** - the Build Critical order was used to create the order.
- **Selective** - the order was built with the Selective Order program.

Item Type - The type of items requested when the order was built.

- **Both** - both white-label and blue-label items were requested.
- **White** - only white-label items were requested.
- **Blue** - only blue-label items were requested.

Order Status - The current status of the order.

- **Built** - The order was built but has not been extracted and sent to the replenishment source.
- **Extracted** - The order has been extracted and sent to the replenishment source.
- **Receiving** - The order has been partially received but there are still open items on the order.
- **Backordered** - All items on the order have been backordered.
- **Closed** - There are no open items to be received and the order is closed.

Date and **Time** (descending) are the default sort fields for this screen. This displays the newest orders first.

See [Sorting](#) for more information on sorting PAR Vision lists.

Order Preview

Shows the items that will be ordered the next time a full order build is done.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Replenishment Source - Select a Replenishment Source to see only the items that will be ordered from the selected source.

Data Fields

Source - The source from which the item will be ordered.

PAR Location - The PAR Location for which the item is being ordered.

Qty - The quantity of the item to be ordered.

Unit of Repl. - The unit of measure in which the item will be ordered.

Item Number - The item number to be ordered.

Item Description - The item description.

Sorting Capabilities

Replenishment Source is the default sort field. This groups together all items that will be contained on the same order.

See [Sorting](#) for more information on sorting PAR Vision lists.

Receipts by Location

The report can be used to check receipts by item for a selected date range or you can check items that have *not* been received over a selected date range. The report also provides the added feature to filter the list by Item Classification.

Using all of these features in combination can provide some very useful information. For example, if you set up an Item Classification that includes all item that have an expiration date, you can see all item with an expiration date that have not been received in the last six months. Using that list you can go check the items to see if you have product on the shelf that is getting close to being expired.

Selection Criteria

PAR Location - Select the location(s) for the receipts you want to review.

Show items with Receipts/No Receipts - Select the desire entry from the list to see item with receipts or without receipts.

Start date - Enter the starting date to start looking for receipts (or no receipts) to be reviewed

End Date - Enter the ending date for the receipts (or no receipts).

Item Classification - Select a class of items to be reviewed. If you do not have item classifications enabled and would like to set up one or more classifications, contact PAR Excellence.

Update Output - After you have enter all your selection criteria click this button to begin the report.

Data Fields

PAR Location - The location where the associated item is located.

Shelf Location - The shelf location where the item is located (assuming you have done a shelf registration).

Item Number - The item number.

Item Description - The description of the item.

UREP - The unit of replenishment (which is the unit of measure that is received).

Qty - The quantity received (this column will be blank if you are looking at items without receipts).

Date Received - The date and time of the receipt (this column will be blank if you are looking at items without receipts).

Order Number - The order number for which this item was received (this column will be blank if you are looking at items without receipts).

Sorting Capabilities

Date Received is the default sort sequence for the report so you see items with the newest receipts first in the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Order Fill Summary

This report provides a summary of the order fill rate per day and replenishment source. The order and receipts for all items on the orders for a particular day and replenishment source are summarized so you can see how well each vendor is fulfilling your orders. The selection criteria let you focus on a particular source and/or location.

Selection Criteria

Replenishment Source - You can select a single replenishment source or run the report for all replenishment sources.

PAR Location - You can select a single PAR Location or run the report for all PAR Locations.

Split out locations by source/day - If you are running the report for All Locations you can either summarize all locations by source and date or you can see the information by PAR Location by checking this box.

Was Built/Received - This selection determines if the date range (Start and End) applies to when the orders were built or when they were received.

Start - The starting date of the range that you want to search for orders (either when they were built or received depending on the above selection).

End - The ending date of the range that you want to search for orders (either when they were built or received depending on the above selection).

Data Fields

Date - The date the order(s) were either built or received (based on the selection above).

Source - The replenishment source for the order(s).

PAR Location - The location for the order(s) or All Locations (depending on the selection above).

Line Items - The number of line items on the order(s).

Filled - How many of the line items were completely filled (all items ordered were received).

% - The percentage of line items that were completely filled.

Partial - How many line items were partially filled.

Not Filled - How many line items were not filled.

Still Open - How many line items are still open.

Total Qty Filled - The total quantity of all items filled.

Sorting Capabilities

Date (ascending) is the default sort fields for this screen. This displays the oldest date with orders first (within the date range selected).

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a date to see the [Order Fill Line Items](#) report for the selected Source, PAR Location and date range specified.

i The data displayed on the Order Fill Line Items report may not exactly match the summary information displayed on this report. The Line Items report will display all line items for this Source and PAR Location in the selected date range (not just the specific date from the Summary screen). If you want to see the exact detail for a single date, use a date range where the Start date and the End date are the same date.

Order Fill Line Items

This report shows the order fill detail for each item on each order. Use this report to see which items have been filled completely and which items were filled partially, or not at all. You can access this report by drilling down from the [Order Fill Summary](#) or by selecting the report from the dashboard menu.

Selection Criteria

Replenishment Source - You can select a single replenishment source or run the report for all replenishment sources.

Replenishment Source Type - Select All Types or Internal sources or External sources.

PAR Location - You can select a single PAR Location or run the report for all PAR Locations.

Was Built/Received - This selection determines if the date range (Start and End) applies to when the orders were built or when they were received.

Start - The starting date of the range that you want to search for orders (either when they were built or received depending on the above selection).

End - The ending date of the range that you want to search for orders (either when they were built or received depending on the above selection).

Data Fields

Item Number - The item number for an item on an order matching the selection criteria.

Item Description - The description of the item.

Date - The date the order was built or received (depending on the option selected above).

Ordered - The quantity of the item ordered on the original order.

Received - The quantity of the item received.

On Order - The quantity of the item still on-order.

UISS - The unit of measure that was ordered.

Source - The Replenishment source from which the item was ordered.

PAR Location - The location for which the item was ordered.

Sorting Capabilities

Item Description and **Date** are the default sort fields for this screen. This displays all orders for a given item together and shows them in ascending date sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

Order Completion Times

You can use this report to see how quickly your orders are being filled by your supply room or by your vendors. For each order created in the selected date range that was subsequently received and closed, the report shows you the created date/time and the closed date/time with the number of hours that passed between the two times.

Orders that are still open will not appear on the report.

Selection Criteria

PAR Location - Select a PAR Location or All Locations.

Start - Enter a starting date and time for the Order Completion analysis.

End - Enter an ending date and time for the Order Completion analysis.

Data Fields

Order Created - The date and time the order was created.

Order Closed - The date and time the order was closed.

Hours - The number of hours it took to receive and close this order

Line Items - The number of line items on the order.

Order Type - The type of order (Full, Selective or Critical)

For PAR Location - The location for which the order was built.

From Source - The replenishment source that filled the order.

Sorting Capabilities

The default sort sequence is the date the order was created. You can easily re-sort the list by the hours taken to receive and close the order. Click the **Hours** heading once to see which order took the longest to be filled. Click it again to reverse the sort and see which order filled the fastest. This will let you see which sources are completing your orders quickly and which are not so fast.

See [Sorting](#) for more information on sorting PAR Vision lists.

Patients and Charging Reports

Patient and Charging Reports

The topics in this section describe the Patient and Charging reports that are available in the PAR Vision system. You can access these reports using the links in the Patient/Charging (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Patient and Charging reports include:

[Current Patients](#)

[Patient User-Field Contents](#)

[Real-Time Charge Audit Trail](#)

[Pending Charges](#)

[Pending-Transaction History](#)

[Empty Bed Charges Summary](#)

Current Patients

Displays the Patients that are currently assigned to a Patient Display Board (PDB). You can use this to verify that the boards are up to date and that all patient movement has been recorded in the system.

Selection Criteria

PDB Location - Select the location of the Patient Display Board or All Patient Display Boards.

Data Fields

Bed - The bed number on a Patient Display Board.

Patient Number - The patient number of the patient in that bed.

Patient Name - The patient name of the patient in the bed.

Admitted - The data and time the patient was admitted into the hospital.



If you want to know when the patient was assigned to this bed (which may be different from the Admitted Date and Time), you can get that information from the [Patient History](#) screen.

Sorting Capabilities

Bed is the default sort field on the screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Patient User-Field Contents

The "User Fields" in the Patient table are normally used internally by the system to indicate how a patient should be categorized in the system. For example, which "patient set" a patient should be added into when an ADT message is received. This report, therefore, would normally be used by a system administrator who is trying to determine if a patient has been categorized correctly and, if not, why.

Selection Criteria

Admission Range - Enter a starting and ending date range to filter the list of patients based on admission date.

Discharge Range - Enter a starting and ending date range to filter the list of patients based on discharge date.

User field 1 matches - Enter a value to look for patients with a specific value in user Filed 1 (the most commonly used user field).

Patient number range - Enter a starting and ending range of patient account numbers to filter the list of patients based on account number.

Data Fields

Patient Number - The patient account number for a patient matching the selection criteria.

Patient Name - The name of the patient. If this field is blank it is because your user profile is set up to not allow you to view patient names.

User Field 1 - The value in User Field 1 for this patient.

User Field 2 - The value in User Field 1 for this patient.

User Field 3 - The value in User Field 1 for this patient.

User Field 4 - The value in User Field 1 for this patient.

Admitted - The date the patient was admitted.

Discharged - The date the patient was discharged (if applicable).

Sorting Capabilities

The default sort for this report is **Patient Name**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Pending Charges

This screen displays the current pending charges that are awaiting assignment to a patient or department. Under normal circumstances pending charges are to be expected as patients arrive on the floor before the ADT information has been sent to the PAR Excellence system. If, however, these charges remain unassigned for any significant length of time, further investigation is warranted.

Data Fields

Date and Time - the date and time the pending charge was touched on the Pending board.

PAR Location - the PAR Location where the pending charge was touched.

Item Number - the item being charged.

Item Description - the description of the item being charged.

Type - the type of transaction that caused the charge.

Qty - the quantity of the the item.

Pending Name - the iButton that was used to pend the charge.

Sorting Capabilities

Date and Time are the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Pending-Transaction History

This report will show you all transactions associated to one or more of your Pending Boards and/or Borrow Cards. You can use this report to identify pending transactions that must still be assigned or to see the history of a particular pending button (or barrow card) to help track down a lost or incorrect patient charge.

Selection Criteria

Pending button or Barrow Card name - Click in the box to see all the pending buttons and barrow cards registered in the system. You can select one of these entries to see the transaction history for a specific button. Leave the box blank to see activity for all pending buttons and borrow cards.

Pendings and/or Borrows - Select from the dropdown list whether you want to see both Pending transactions and Borrow Card transactions or just one or the other.

Pendings with Some Unresolved Transactions Only - Check this box to see transaction history for a button only if there is unresolved transactions included. If a button has some unresolved transactions then the report will still show all transactions for that button since some of the resolved transactions may assist in resolving the rest. If there are no unresolved transactions then no date is displayed.

Start Date/Time - Enter the starting date and time for the transaction history analysis.

End Date/Time - Enter the ending date and time for the transaction history analysis.

Associated with - Select all Locations or a specific PAR Location.

Data Fields

Pending Name - The name of a Pending button or Borrow Card. The format of the pending button name is a button number at a location, or a button number on a board number at a location (if there are multiple Pending Boards register for a location). Borrow Card buttons are similarly named with a button number at a location or a Borrow Card number then the button number and location.

Date/Time - The date and time of the transaction.

Patient - The name of the patient is the transaction is resolved.

Activity - The type of activity for this transaction.

Qty - The quantity of the item for this transaction.

Item Number - The item number for this transaction.

Item Description - The description of the item.

Sorting Capabilities

The default sort sequence for this report is **Pending Name** and Date/Time within the Pending Name.

See [Sorting](#) for more information on sorting PAR Vision lists.

Empty Bed Charges Summary

This screen summarizes the Empty Bed Charges by PAR Location.

Data Fields

PAR Location - A PAR Location that has Empty Bed Charges pending.

Number of Empty Bed Charges - The number of pending charges at the location.

Sorting Capabilities

Number of Empty Bed Charges is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location in the list to see the [Empty Bed Charges Detail](#) for that location.

Empty Bed Charges Detail

This screen is displayed when you click on a PAR Location on the Empty Bed Charges Summary screen. The information displayed will help you determine the appropriate patient or department to which the charges should be applied.

To return to the Empty Bed Charges Summary screen, click the **Previous** button at the top of the screen.

Selection Criteria

PAR Location - Select a PAR location to display. The default selection is based on the PAR Location selected on the Summary screen.

Data Field

Date and Time - The date and time of the Empty Bed charge.

Bed - The bed to which the charge was applied.

Type - Type of transaction the created the charge.

Qty - The quantity of the charge.

Item Number - The item number of the item charged.

Item Description - The item description.

Sorting Capabilities

Date is the default sort for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Real-Time Charge Audit Trail

If you use the real time charging feature in PAR Excellence, this report will display the charges that have been set for a specified date range. This report can be used to verify the charges sent by the PAR Excellence system match the charges reported by the hospital billing system. This is important because in rare cases the charges are not passed through the interface from PAR Excellence to the billing system due to computer or network problems.

Selection Criteria

Start Date - The beginning date in the range to look for charges.

End Date - The ending date in the range to look for charges.

Update Output - Click this button after you have selected the desire dates to begin the report.

Data Fields

Send Date and Time - The date and time the charge was queued by PAR Excellence to be sent to the hospital billing system.

Charge - The charge code associated to the item.

Patient Number - The visit number of the patient who was charged.

Patient Name - The name of the patient who was charged.

Qty - the quantity of the item charged to the patient.

Net Cost - The item cost (multiplied by the quantity).

Item Number - the item number of the item charged to the patient.

Item Description - The description of the item charged to the patient.

Date of Service - The date of service attached to the charge. Usually this will match the Tran Date, however, depending on how you have your system configured, you may be allowed to override the

date of service to an earlier date. This feature lets you enter charges for a patient for a case performed on the previous day.

Tran Date - The date the item was charged to the patient. Usually this will match the Send Date and Date of Service, however, it can be different if the user overrides the date of service or if the user does not "process" the charge immediately.

 In most cases, the **Send Date**, **Date of Service** and **Tran Date** will all be the same. There are instances, however, where one of the dates may not match the other two, or all three dates may be different. For example:

- The Tran Date is the actual exact date the item was charged to the patient. This may differ from the Send Date if the charge was not "processed" until the next day. In this case the Send Date would be a day later than the Tran Date.
- Also, your system might be configured to let you override the Date of Service so you can enter charges for a case performed the previous day. In this case, the Date of Service will be a day earlier than the Tran Date.

Sorting Capabilities

Send Date and **Time** is the default sort sequence for this report. If you are comparing charges between PAR Excellence and the hospital billing system, this is the date/time the billing system should have processed the charge.

See [Sorting](#) for more information on sorting PAR Vision lists.

Usage Reports

Usage Reports

The topics in this section describe the Usage reports that are available in the PAR Vision system. You can access these reports using the links in the Usage (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Usage reports include:

[Receipts Value Summary](#)

[Item Usage Summary](#)

[Cost Allocation](#)

[Item Usage by Source](#)

[Activity by Expense Code Description](#)

[Usage Summary by Patient](#)

[Transaction Count Summary](#)

[Usage Summary by Bed Group](#)

[PAR Excellence User Logon Summary](#)

Receipts Value Summary

The Receipts Value Summary report shows the total quantity and value of items received during a specified interval. The calculation of item value depends on the purchase cost field which is specified in the Item Master file.

The quantity calculation includes all items received, including both received orders as well as any items which are supplied using the "Replenish without Ordering" function. The receipt transactions show all items which were resupplied to the PAR locations, without regard for whether the items were issued to patients, or issued to the department, or lost. Therefore, the Receipts Value Summary report is the most comprehensive accounting of the total quantity of items used by the PAR locations.

Data on the Receipts Value Summary report is organized based on expense center and expense code. The report will show detail or summary data, as requested.

The report also includes an option to show only transactions from the "Replenish without Ordering" function, which provides a means of monitoring the "Replenish" function and determining which items and locations are most commonly "Replenished".



If items are being replenished to the PAR locations without being properly processed through the PAR Excellence system, then the system cannot account for these items using the receipt transactions.

Selection Criteria

Replenishment Source - You can select a specific replenishment source from the list or you can run the report for all replenishment sources.

PAR Location - You can select a single PAR Location or a Group of locations or run the report for all locations.

Combine Locations - You can choose to combine the data for the items across all locations where they are stocked or you can see the detail for each item at each location.

Chargeable/ Non-Chargeable/Both - You can choose to run the report for just chargeable items or just non-chargeable items or both chargeable and not-chargeable.

Item Number - If you want to run the report for a single item, enter the item number in the box. As you type the item number the system will filter the list of items. When you see the item you want, click on the item to select.

Item Description - If you want to run the report for a single item but you don't know the item number, you can enter an item description in the (second) box. As you type the description the system will filter the list of items. When you see the item you want, click on the item to select.

Combine Items - You can choose to combine the data for all items in the locations or you can see the detail for each item at each location.

Start - Enter the starting date of the date range you want to use for the report.

End - Enter the ending date of the date range you want to use for the report.

Show - Select the types of replenishment transactions you want to include in the report. Normally you will use the default (All Item Receipt Activity).

Update Output - After you have entered all your selection criteria click the Update Output button to run the report.



You can only select to Combine Locations or Combine Items, not both.

Data Fields

PAR Location - The name of the PAR Location, Group or All Locations (depending on the selection criteria).

Category - If you have Expense centers and/or Expense Codes defined in the system, this column will show the Expense Center or Expense Code to which the receipts apply. If no Expense Center or Expense Code is found to categorize a receipt the receipt will be categorized using the PAR Location name and whether it is chargeable or non-chargeable.

Total Cost - The total cost of all the receipts for the corresponding category.

Item Cost - The single item cost (only displayed when Combine Items is not selected).

Qty - The total quantity of the item received for the date range (only displayed when Combine Items is not selected).

UISS - The Unit of Issue for the item (only displayed when Combine Items is not selected). If different locations have different Units of Issue, the item will appear multiple times on the report (even if you select Combine Locations).

Item - The item number.

Description - The item description.

Source - The Replenishment source

Sorting Capabilities

The default sort sequence for this report is a "complex sort" based on three columns (**PAR Location**, **Category** and **item**).

See [Sorting](#) for more information on sorting PAR Vision lists.

Item Usage Summary

This report simply shows you the usage of each item at each location over a date range.

Selection Criteria

PAR Location - Select a PAR Location or All Locations.

Start Date/Time - Enter the starting date and time for the usage summary.

End Date/Time - Enter the ending date and time for the usage summary.

 This report calculates usage based on dispense transactions, credit transactions and (optionally) adjustment transactions. The only items included in the report, therefore, will be white items that are touched (or scanned) out for each transaction or PAR Bin items where dispense transactions are tracked by patient or department. Use the Receipts Value Summary report to see usage information for blue items that are not dispensed to patients or departments.

Data Fields

Item Number - The item number for an item with usage in the selected date range.

Item Description - The description of the item.

UISS - The Unit of Measure used to dispense the item to a patient.

PAR Level - The current PAR level for the item (at the corresponding location)

Critical Level - The current Critical level for the item (at the corresponding location).

Usage Qty - The total quantity used for this item at this location over the selected date range.

Total Cost - The total cost of the items used (requires that item cost information is loaded in the PAR Excellence Item master).

Total Patn Cost - The cost to the patient for the items used (requires that patient cost information is loaded in the PAR Excellence Item master).

PAR Location - The location corresponding to the usage information.

Charge? - Y or blanks depending on if the item is chargeable at this location.

Charge Code - The charge code for the item if it is chargeable.

Date Added - The date the item was added to the location. Usage data is based on the selected Start date or the date the item was added, whichever is most recent.

Sorting Capabilities

The default sort sequence for this report is a **PAR Location** then **Item Number** within the location. See [Sorting](#) for more information on sorting PAR Vision lists.

Item Usage by Source

This reports provides a variety of different views and options for item usage over a selected date range. The report always shows usage separated by Replenishment Source but there are other options that allow you to see different levels of detail for each replenishment Source. You can see a simple Item Usage report (similar to the [Item Usage Summary](#) report) or you can select different options to see usage summarized only by Replenishment Source or by Item Classification within Replenishment Source. Refer to the Selection Criteria below for information on how each of the selection options affects the report.

Selection Criteria

Replenishment Source - Select a Replenishment Source or All Sources. If you select All Sources the usage will be separated by replenishment source (regardless of the other summarization options selected in the options described below).

PAR Location - Select a single PAR Location or All Locations.

Combine Locations - If you select All Locations you can check this box to have the usage for all locations combined into a single line (by Replenishment Source).

Item Classification - Select All Items or one of the Item Classifications. If your system currently has no Item Classifications defined and you think this option might be useful, contact PAR Excellence Technical Support for assistance defining Item Classifications.

Item Detail/Sum All Items/by Class/by Class and Unclassified - Select one of these options to determine the level of summarization done at the Item level of the report.

- **Item Detail** - Shows each item individually on the report. The items may still be summarized by location if you check the Combine Locations check box described above.
- **Sum All Items** - Summarizes the usage for all items by Replenishment Source. Depending on whether or not you check the Combine Locations box you will get one line per Replenishment Source (with the usage for all items/all locations combined) or one line per Replenishment Source and PAR Location.
- **By Class** - Summarizes the usage by Item Classification within a Replenishment Source. Only items with an Item Classification are included in the output. Once again, the report will show one line per Replenishment Source or one line for each location within a Replenishment Source depending on the Combine Locations selection.
- **By Class and Unclassified** - This is the same as the by Class option except all items are included in the output with those that do not have an Item Classification put into an "unclassified" class.

Start Date/Time - The starting date and time for the date range to be included in the report.

End Date/Time - The ending date and time for the date range to be included in the report.

Include "Lost" Items - Check this box to include adjustments in the usage calculation. If you do not check the box only dispense and credit transactions are included.

i This report calculates usage based on dispense transactions, credit transactions and (optionally) adjustment transactions. The only items included in the report, therefore, will be white items that are touched (or scanned) out for each transaction or PAR Bin items where dispense transactions are tracked by patient or department. Use the Receipts Value Summary report to see usage information for blue items that are not dispensed to patients or departments.

Data Fields

Source - The Replenishment Source.

PAR Location - The PAR Location. If the Combine Location option is selected, this will be All Locations.

Total Cost - The total cost of all items summarized into this line of the report (based on the selection criteria).

Qty - The total quantity used for all items summarized into this line of the report (based on the selection criteria).

UISS - The Unit of Measure used to dispense the item. This information is only displayed if **Item Detail** is selected. If an item is dispensed by a different UOM at different locations it will appear multiple time on the report (once for each UOM) even if the Combine Location option is selected.

Item - The item number for the item. This information is only displayed if **Item Detail** is selected.

Description - The description for the item. If one of the **by Class** options is selected this column will contain the Item Classification for the summarized line..

Sorting Capabilities

The primary default sort sequence for this report is always **Replenishment Source**. Depending on the Selection Criteria used the report will use PAR Location and Item description as secondary sort fields.

See [Sorting](#) for more information on sorting PAR Vision lists.

Usage Summary by Patient

This report shows the item usage by patient over a selected date range. All usage for an individual item by a specified patient over the selected date range are summarized together in the report. For example if the same item is used on the same patient on two different days in the selected range, that usage will be combined in this report.

Selection Criteria

PAR Location - Select a PAR Location or All Locations.

Patient Number or **Patient Name** - Optionally you can select an individual patient by patient number or name.

Start Date/Time - The starting date and time for the usage to be reported.

End Date/Time - The ending date and time for the usage to be reported.

Data Fields

Patient Number - The patient account number for the patient.

Patient Name - The name of the patient.

Item Number - The item number for the item used by the patient.

Item Description - The description of the item used by the patient.

Charge Code - if the item is chargeable, this is the charge code.

UISS - The Unit of measure dispensed to the patient.

Usage Qty - The quantity of this item used by the patient over the selected date range.

Total Item Cost - The total item cost for all of this item dispensed to this patient over the selected date range (requires that item cost information is loaded in the PAR Excellence Item master).

Total Patn Cost - The total cost to the patient all of this item dispensed to this patient over the selected date range (requires that patient cost information is loaded in the PAR Excellence Item master).

Sorting Capabilities

The primary default sort sequence for this report is always **Patient Name**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Cost Allocation

This report: provides G/L cost information for a location which serves multiple cost centers. Cost Center information (as it relates to this report) is stored in "User Field 3" in the patient table. The Cost Center information can be passed via the ADT feed or it can be updated manually for each patient.

 This is a unique report that is probably only applicable to a small number of PAR Excellence installations. In order to get meaningful data on this report the following data must be maintained in your PAR Excellence system:

- Ideally, the Cost Center information is passed in the ADT message for each patient.
- The Items should have Expense Codes assigned.
- You must maintain accurate item cost information in the PAR Excellence Item master.
- You must have the need to provide cost information to your G/L system for multiple cost centers.

Selection Criteria

PAR Location - Select a PAR Location.

Summary or **Detail** - The Summary report shows one line per Department/Category for each Expense Code and it only includes the Value columns of the report. The Detail report contains a line for each transaction included in the analysis.

Start Date - The starting date for the analysis.

End Date - The ending date for the analysis.

Data Fields

Department/Category - This column contains the Department or Category for the Cost Allocation. The value in this column will fall into one of four categories:

- The name of the location selected in the drop down list. These are department dispenses (versus patient charges) for white label items or chargeable blue items (or PAR Bin items).
- A category passed into the system in the patient User Field 3 indicating a cost center for the patient charge.
- Blue Items are receipts for all blue items indicating item usage whether or not the item was charged to a patient of department.
- Adjustments are adjustments to white items.

Expense Code - The Expense Code associated to an item.

Patient Qty - The quantity of the item charged to patients in this category. This column is only populated when you are looking at the Detail report.

Patient Value - The value of the items charged to patients in the category. This column is reported for both the Summary and detail report.

Department Qty - The quantity of the item charged to the department for this location. This column is only populated when you are looking at the Detail report.

Department Value - The value of the items charged to the department for this location. This column is reported for both the Summary and detail report.

Total Qty - The total quantity of the item for this category/department. This includes patient charges, department charges blue item receipts and white item adjustments. This column is only populated when you are looking at the Detail report.

Total Value - The total value of the items for this category/department.

Item Number - The specific item number that was dispensed, received or adjusted. This column is only populated when you are looking at the Detail report.

Item Description - The description of the item that was dispensed, received or adjusted. This column is only populated when you are looking at the Detail report.

Sorting Capabilities

The primary default sort sequence for this report is **Department/Category** with **Expense Code** as the secondary sort field.

See [Sorting](#) for more information on sorting PAR Vision lists.

Usage Summary by Bed Group

This report shows total usage value by Bed Group and Expense Code over a selected date range.

i This is a unique report that is probably only applicable to a small number of PAR Excellence installations. In order to get meaningful data on this report the following data must be maintained in your PAR Excellence system:

- The Beds must be assigned to Account Groups (i.e., Bed Groups).
- The Items must have Expense Codes assigned.

Selection Criteria

PAR Location - Select a PAR Location or All Locations.

Start Date/Time - The starting date and time for the date range to be included in the report.

End Date/Time - The ending date and time for the date range to be included in the report.

Data Fields

Bed Group - The name of an Accounting Group assigned to one or more beds in the system.

Expense Code - The Expense Code assigned to one or more items in the system.

PAR Location - The name of a PAR Location that has a dispense of an item with an Expense Code to a patient that is in a bed that is part of an Accounting group.

Total Value - The total value of all qualifying dispenses for the select date range.

Sorting Capabilities

The default sort sequence for this report is **Bed Group**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Activity by Expense Code Description

This report shows information similar to the [Activity Detail](#) report with the added feature of displaying the Expense Code associated to an item. Only items that have an Expense Code assigned will appear in the report. This could be a useful report for those hospitals that track item usage by Expense Code.

Selection Criteria

PAR Location - Select a PAR Location or All Locations.

Expense Code - Select an Expense Code or All Expense Codes.

Start Date/Time - Enter the starting date and time for the data to be reported.

End Date/Time - Enter the ending date and time for the data to be reported.

Data Fields

Date/Time - The date and time of the activity.

Patient - The patient for the activity (if applicable).

Activity - The type of activity.

Bed - The bed to which the patient was assigned (if applicable).

Qty - The quantity of the item for this activity.

UISS - The unit of measure for the item.

Item Number - The item number for this activity.

Item Description - The description of the item.

Expense Code - The expense code to which this item is assigned.

PAR Location - The PAR Location for the item/activity code.

Sorting Capabilities

The default sort sequence for this report is **Expense Code** (and PAR Location and patient within Expense Code).

See [Sorting](#) for more information on sorting PAR Vision lists.

Transaction Count Summary

This report summarizes the number of each type of transaction by PAR Location for each day in the date range selected. This information is used for determining high usage days for various PAR Locations. Optionally, you can combine the locations to see high usage days across the hospital.

Selection Criteria

PAR Location - Select a PAR Location, Group or All Locations.

Combine Locations - Check this box to combine the transaction count across all locations at the hospital (versus counts for each location).

Start - The starting date for the date range to analyze.

End - The ending date for the date range to analyze.

Data Fields

Date - A date within the date range where there was dispense, credit or requisition activity.

PAR Location - The name of a location (if the Combine Locations box is checked this will be all selected locations).

Items Dispensed - The number of Dispense transactions that occurred on this day.

Dispensed Qty - The total quantity of all the dispense transactions that occurred on this day.

Items Credited - The number of Credit transactions that occurred on this day.

Credited Qty - The total quantity of all the credit transactions that occurred on this day.

Items Requisitioned - The number of Requisition transactions that occurred on this day.

Requisitioned Qty - The total quantity of all the requisition transactions that occurred on this day.

Sorting Capabilities

The default sort sequence for this report is **Date** and **PAR Location** within date. If Combine Locations was selected the sort would be on Date only.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Excellence User Logon Summary

Use this report to see a summary of activity by all of the users of the PAR Excellence system. This report will only contain meaningful data if your hospital has the **Activate Security** setting set to **Yes** in System Options. This report only contains PAR Client users (the PAR Excellence foreground system) and does not have any information about PAR Vision users.

Data Fields

User - The user ID for a PAR Excellence user.

Most Recent - The most recent logon for the user.

Wrong Password - The last time an incorrect password was entered for this user ID

First Ever - The first time this user ID was ever used to access the system.

Password Expires - The date the password expires for this user.

Authorization Groups - The authorization groups assigned to the user.

Sorting Capabilities

The default sort sequence for this report is the date the user's password expires in descending sequence.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Bins Reports

PAR Bins Reports

The topics in this section describe the reports that are specific to an installation where PAR Bins are being used. These reports provide valuable information about the scales at the location, as well as, the items and the usage.

The PAR Bins reports include:

[Scale Statistics](#)

[PAR Bin Item Reference Weights](#)

[PAR Bins Item Activity](#)

[PAR Bin Signalled Stock-Outs](#)

Scale Statistics

The Scale Statistics report provides an overview of the scales installed at each PAR Bins Location.

Much of the information on the report is general information about the scales that is probably most useful to the PAR Excellence Account Manager or a Technical Product Support representative. A few of the columns, however, can be used to help identify and correct scales and items at the location that are not registered correctly.

Summary

The summary screen shows one line of information for each PAR Bins location. This is a summary of all the scales installed at that location. The data displayed includes:

PAR Location - The name of a PAR Location where PAR Bins scales are installed.

Scales Online - the number of scales at this location that are currently set online. This would include all scales that are currently communicating with the system and any scale that is not communicating but has not been set offline.

PBS Ports - The number of scales controllers used at the location. Each controller has its own PBS process that is communicating with the scales (through the controller).

Segments (Wire Reg) - This is the number of segments used for all controllers. Each controller can have up to three physical segments. This information is derived from the wire registration information so if a wire registration has not been done at the location this number will not be accurate.

3130 S2 - The number of small 2K scales (model 3130) installed.

3131 S5 - The number of small 5K scales (model 3131) installed.

3160 M5 - The number of medium 5K scales (model 3160) installed.

3161 M15 - The number of medium 15K scales (model 3161) installed.

Tandem (# Scales) - The number of scales that are part of a tandem set.

i This value can immediately highlight a problem in the system because it should always be an even number (since tandem scales are defined in pairs). If this is an odd number you should investigate why one (or more) tandem scales does not have a "partner".

Non-Tandem - The number of non-tandem scales at the location.

Used as Secondary - The number of scales that were registered with a secondary button or barcode.

Online, No Item - The number of scales that are online but have no item registered.

Offline - The number of scales that are marked offline.

Items w/o a Scale (Blue) - The number of blue label items defined at the PAR Location that are not registered to a scale. These items will be treated as normal BLUE items and must be requisitioned with a RRR board in order to be replenished.

Items w/o a Scale (White) - The number of white label items defined at the PAR Location that are not registered to a scale. These items will be treated as normal WHITE items and the system will decrement quantity on hand based on transactions from touch probe, scanner or PAR Express screen entry.

i If any of the last four columns are non-zero, you can click on the number to drill-down to a detail view of the scales or items that make up the statistic. These detail screens are described below.

Detail

The last three columns represent scales and items that might need attention. Click on the non-zero number in one of these columns to see the detail information for the statistic. This information will help you decide if further action is necessary.

Scales Online with No item Registered

This report shows the scales at the location that are still set as being online but do not have an item registered to the scale. The information displayed in the report is intended to help you locate the "problem scale" so you can correct the problem.

Following are some of the scenarios that will lead to this situation along with the recommended solution.

What Happened	How to Fix It
<p>During the registration process in a new location you may have inadvertently skipped the registration of an item (and scale). In this case there should be a corresponding entry in the Items without a Scale report (that should not be part of that report).</p>	<p>Complete the registration process by registering the item and scale that was skipped.</p>
<p>A scale and item was removed from the PAR Location but the scale was not marked offline.</p>	<p>If the scale has been removed and is not longer communicating with the system then you can click the Set Offline button on the screen to tell the system that the scale is not longer active.</p>

The item was removed from the PAR Location database table but the scale was not physically removed from the room.

In this case you must first decide if a mistake was made when the PAR Location database record was removed.

Assuming the item is no longer supposed to be stocked at this location, you should first physically remove the scale and then set the scale offline.

If the PAR Location database record was deleted in error, you should use PAR Location Items maintenance to re-add the item to the location. Then you must re-register the item to the scale (as if it were a new item).

Offline Scales

This report shows the scales at the location that have been set offline and are no longer communicating with the system. This information is usually provided for informational purposes only and generally does not indicate any kind of problem.

The information displayed for each scale can be used to identify the item that had been registered to the scale prior to it being set offline.

In rare cases a scale may quit communicating because of a faulty connection and then incorrectly marked offline (rather than fixing the problem). In these cases, the information in the report should allow you to easily locate the scale and set it back online after the problem has been corrected.

Items without a Scale

This report shows the items at the location that are not registered to a scale. The information displayed on this report is simply the Item number and description.

If you have **Scales Online with No item** (see above), the item(s) that should be registered to the scale(s) can probably be found in this list.

Some items in the list may be normal BLUE items that are being requisitioned using the RRR board or some of the items in the list may be normal WHITE items with QOH being managed by some means other than a scale.

PAR Bins Item Activity

The report provides a detailed view of all activity on a PAR Bin item that affects the quantity on hand.

The quantity on hand for a PAR Bin item is only affected by items being removed from the bin and items being put into the bin. These events are reflected on the screen as quantity decreases and quantity increases along with the date and time of the event. The report further includes the related events that "caused" the decrease or increase (the dispense or receipt).

You should be able to match up quantity decreases to dispense transactions and quantity increased to credit transactions or receipt transactions. This report can be very useful when researching an out of stock condition or quantity over PAR level.

Selection Criteria

PAR Location - Select a PAR Bins location.

Start - Enter the starting date for the activity that you want to analyze.

End - Enter the ending date for the activity that you want to analyze.

After the select criteria has been entered (or changed), click the **Update Output** button.

Summary Data

The summary displays each item at the location with a summary of the quantity on hand changes during the selected period. You can click on an item in the list to drill-down to the detail activity of QOH changes.

Item Number - The item number.

Item Description - The description of the item.

Weight - The unit weight for the item. This is useful information to have when the QOH changes do not match up to the dispenses and receipts. If the unit weight is wrong, the scale will think more or less was taken (or put into) the bin for each event.

UISS - The unit of issue for the item. This is additional useful information since the unit weight is directly related to the unit of issue.

QOH changes - The number of time the quantity on hand has changed during the selected date range.

Details

When you click on an item on the Summary screen the system displays the details for all the quantity changes for the selected date range.

The **Selection Criteria** from the Summary screen is repeated on this screen and you can change it to see information from a different **PAR Location** or **Date Range**. In addition this screen has an **Item** selection criteria. The item is pre-filled with the item selected on the Summary screen but it also can be changed to see Detail information for a different item.

Date/Time - The date and time of the event (a quantity changed or a dispense/receipt transaction).

Bin(s) Qty - The PAR Bin quantity change at the corresponding date and time.

Tran Qty - The quantity of the Dispense or Receipt transaction.

Transaction - The type of transaction (**Starting QOH**, **Dispense**, **Credit** or **Receipt**). The Starting QOH represents the quantity in the bin(s) as of the starting date selected and does not (directly) reflect any activity.



If there is a value in the **Bin(s) Qty** column the entry is for a PAR Bin quantity change and the **Tran Qty** and **Transaction** columns will be blank. Conversely, if there is a **Tran Qty** and **Transaction**, the corresponding **Bin(s) Qty** columns will be blank.

Usage

During normal operations of the scale (i.e., assuming no scale *setup* activity was done during the selected date range) you should be able to match up the quantity changes to the Dispense and

Receipt transactions. If the quantity goes down by 2, there should be a corresponding dispense transaction "around" the same time for a quantity of 2. If the quantity increases by 10, there should be a receipt transaction for 10.

PAR Bin Item Reference Weights

Use this report to check the reference weights of the items on PAR Bin scales. The reference weight of an item is a critical piece of information used in the calculation of the quantity on hand for an item. The reference weight for an item represents the unit weight of a single item. If the total weight in a bin is 1000 grams and the reference weight for the item in the bin is 50 grams, the system calculates the quantity on hand for that item to be 20.

If the item reference weight is incorrect the system will not be able to calculate the quantity on hand accurately. In the above example, if the reference weight for the item was incorrectly registered as 55 grams (rather than 50), the system would think there are only 18 items in the bin rather than 20.

Selection Criteria

Show All or **Show Substitutes Only** - Use this selection to display the reference weights for all items or to show the weight only for substitute items. A substitute item is a temporary item sent from the vendor because the item ordered is not in stock. Often times the substitute item does not weight exactly the same as the actual item and can cause problems with the calculated quantity on hand. This option lets you focus only on items with substitutes when trouble-shooting QOH problems.

Locate Item - Use this field to type all or part of an item number or description to locate that item at the select PAR Location. Normally, you will enter a complete (unique) item number to locate an item. If you enter a partial number or description, the system will find the first item matching the partial entry. Type the number or description and the use the Tab key to exit the field, or press the Enter key, or click on the screen outside of the box. The system will find that item in the list and move the report to that item (and highlight the item).

Data Fields

Item Number - The item number for the item.

Item Description - The description for the item

UISS - The unit of measure in which the item was weighed.

PAR Location (if substitute) - If this is a substitute item this is the location where the substitute was stocked versus the actual item.

Ref. Weight - The unit weight of the item that is being used to calculate the quantity on hand.



- This symbol indicates that this item has been re-weighed.



You can click on the clock icon to see the "Reference Weight History" for the item. This information can be important when trouble-shooting problems because you can see if/when the weight of an item was changed significantly (and who made the change).

Variance - The variance among the 5 weights taken to determine the reference weight.

Variance % of Ref. - The variance as a percentage of the reference weight. If the Variance % is a high value it is an indication that there is a big discrepancy between the weight of one unit to the next (of the same item). This can be a problem because if you happen to get a large number of light weight (or heavy) items in the bin all at one time, it could cause the system to calculate the wrong quantity on hand. This could also be an indication that the wrong unit of measure was used to record one of the weights.

Weight 1 - The weight of the first sample taken by the Setup Bin program.

Weight 2 - The weight of the second sample taken by the Setup Bin program.

Weight 3 - The weight of the third sample taken by the Setup Bin program.

Weight 4 - The weight of the fourth sample taken by the Setup Bin program.

Weight 5 - The weight of the fifth sample taken by the Setup Bin program.

Timestamp - The exact date and time the measurements were taken to establish the reference weight.

Operator - The person who weighed the item. If this column is empty then the person who weighed the item did not identify him/herself.

Computer - The setup computer that was used to establish the reference weight. This information will be captured even if the operator is empty.

Sorting Capabilities

Item Number is the default sort sequence for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Scale Registrations

This report provides scale and bin information about all the items currently registered to a PAR Bin scale. You can use this report to help you plan the installation of a new location. For example, if you are setting up a new supply location on the 4th floor that will have basically the same supplies as an existing location on the 3rd floor, you can use this report to see what scales and bins you will need for the new location.

Selection Criteria

PAR Location - Select a PAR Location or group, or All Locations.

Item Number - To see the scale and bin information for a single item across all selected locations, enter an item number in this field and select the item when it appears in the list.

Item Description - You can also search for a single item using the item description. As you type a description the item list will be filter by the information typed. Select the item when it appears in the list.

Data Fields

PAR Location - The PAR Location for the corresponding scale registration.

Item Number - The item number for the scale registration.

Item Description - The description of the item.

PAR level - The PAR level for this item at this location. This is important information since the scale and bin may be directly related to the PAR level. If the PAR level for an item in a location is 20 and it is registered to a 2Kg small scale you may need a larger scale if the PAR level for the item in the new location will be 50.

UISS - Unit of issue for this item at this location.

Bin Size - The bin size used for the item at this location. Bin sizes in the 200 range reflect the actual Akro bin size used for the item. Bin sizes in the 900 range reflect the use of a platform scale for the item.

Scale Model - The actual PAR Excellence scale model used. This is the number you will use to order new scales from PAR Excellence.

Model Description - The description of the scale used. This information will tell you the size of the scale (small, medium or large) and the scale capacity (2Kg, 5Kg, etc.)

Ref Weight - The reference weight of a single item. This information can be used in conjunction with the PAR level to estimate the capacity of the scale required.

Sorting Capabilities

The default sort sequence for this report is **PAR Location** and, within location, **Item Number**. You can easily change the sort sequence by clicking on one of the column headers in the report. For example, if you want to sort by Item Number so all occurrences of an item are grouped together in the report, simply click on the **Item Number** column heading.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Bin Signaled Stock-Outs

This function works in conjunction with the PAR Bins system to insure that the Materials Staff is notified immediately of an out-of-stock condition for a supply. The Caregiver can signal a stock-out by pressing the ID button on the PAR Bin scale when he/she takes the last item out of the bin. This signal is transmitted to PAR Vision and appears in this report.

The Materials Staff can monitor PAR Vision and see immediately that an item is out of stock at a location and create a Selective Order to replenish the stock without waiting for the next Full Order run.

The procedure to signal a stock out is:

1. The Caregiver should press the **ID button** on the scale when he/she takes the last supply out of the bin.
2. This will tell the Materials Staff the item and location that needs immediate replenishment.
3. The Materials Staff will create a Selective Order for the item at that location.
4. Once the order is received and delivered to the location, the Materials Staff can Clear the Signaled Stock-Out.

Data Fields

- Check the box if you want to clear multiple stock out signals at one time. If you click the **Clear All Selected** button at the top of the screen, the program will clear all checked signals.



- Click this button to clear an individual stock out signal.

Prior QOH and Time - The quantity on hand from the most recent measurement just prior to the signaled stock-out.

When Signaled - This is the date and time the ID button on the scale was pressed to signal the stock-out.

QOH After and Time - The quantity on hand from the measurement taken soonest after the signaled stock-out.

Current Scale Calculated QOH - The current quantity on hand in the bin as reported by PAR Bins.

 The three QOH values discussed above are intended to assist you in determining whether this is a stock-out condition that can be remedied by restocking the bin, or if the stock-out was the result of the scale reporting an incorrect QOH (see below) or, possibly, someone may have pressed the ID button by mistake.

There are a number of reasons why a scale may report an incorrect quantity which could lead to a stock-out situation. Some of the more common causes are listed below. If the scale is not reporting the correct quantity and you cannot determine why, contact PAR Excellence Technical Support for assistance.

Common Causes for Incorrect QOH

- Something is pushing up or down on the bin. This could be stock from another bin or the bin could be "hung up" on the bin next to it.
- The unit of issue for the item is incorrect in the database. If an item is being issued by the box but the database has a unit of issue of EA, the quantity will be incorrect.
- The Reference Weight of the item is incorrect. The weight of the item must be accurate for the unit of issue. If the packaging of the item has changed (for example, the packaging changed from a box to a bag) you should re-weigh the item to insure the Reference Weight is accurate.
- In rare cases the scale could be measuring incorrectly. This is usually due to damage to the scale (for example, the scale was over-loaded, dropped or otherwise abused). If you suspect that the scale is not measuring correctly, swap the scale for a new scale and return the defective scale to PAR Excellence for analysis.

PAR Location - The location where the stock-out was signaled.

Item Number - The item number for which the stock-out was signaled.

Item Description - The description of the item for which the stock-out was signaled.

Sorting Capabilities

The **When Signaled** column (in ascending order) is the default sort field for this report. This shows you the oldest (uncleared) stock-out through the newest.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Express Reports

PAR Express Reports

These reports provide information about the activities performed on the PAR Express workstations in the hospital. Managers can review these reports daily to insure that proper procedures are being followed at the charging stations.

The PAR Express reports include:

[PAR Express Activity](#)

[PAR Express Suspended Batches](#)

[PAR Express Charges by Employee](#)

[PAR Express Completed Batches](#)

[PAR Express Discarded Batches](#)

PAR Express Activity

This report provides an audit trail of all the activity performed at a PAR Express workstation. Using this report you can see when a Caregiver logged on to the system, which patient was select and if the batch was accepted properly prior to logging off. In addition you can see when items were put into a bin (such as; from restocking activities) and, most important, when a chargeable item is removed from a bin but not charged to a patient.

Selection Criteria

PAR Express Workstation - Use the list to select the PAR Express computer for the activity to be viewed.

Start - Enter the starting date for the activity that you want to view.

End - Enter the ending date for the activity that you want to view.

Select Events - Click this button to get a pop-up list of activities that can be include (or excluded) from the report. The choices are:

- **Log On** - This activity shows when a user logs onto the PAR Express system. If you using one of the Log On modes that requires each user to have his/her own log on code, you can see the name of the user that logged on.
- **Log Off** - If this activity is selected you will see an activity for each time a user logs off PAR Express.
- **Patient Selected** - Shows when a Patient is selected along with the Patient Name. If your PAR Vision profile does not allow you to see patient names you will still see the Patient Selected activity but the Patient Name column will be blank.
- **Batch Accepted** - Indicates that a batch of charges was accepted for the previously selected patient.

- **Re-Stock** - This activity is logged when inventory is put into a bin. When all procedures are being followed properly this will only happen when the Material staff is re-stocking the room.
- **Lost Charge** - This very important event tells you when an item is removed from a bin but is not charged to a Patient (or department). It is very likely that this is a lost charge to the hospital (although not always). If a Caregiver takes an item but does not Log On to the computer, select a Patient and Accept the batch, the item will appear as a Lost Charge in this report.

Data Fields

Date and Time - The exact date and time the even occurred.

Event - One of the events (described above).

Employee - The employee that performed the activity. This information is only available if you are using one of the PAR Express Log On modes that requires each user to have his/her own log on code.

Qty - For a Lost Charge or Re-Stock event this is the quantity of the item removed or put into the bin.

Patient - For a Patient Selected event this is the patient that was selected.

Item Number - For a Lost Charge or Re-Stock event this is the item number of the item.

Item Description - For a Lost Charge or Re-Stock event this is the item description of the item.

PAR Location - For a Lost Charge or Re-Stock event this is the PAR Location for the item.

Usage

Correct Sequence of Activities

When everyone is doing their job properly and all procedures are being followed, the list of events will present a very uniform pattern of the activity in the room. The standard list of events that you should see repeated over and over are:

Date	Time	Event
04/20/12	15:45:04	Log On
04/20/12	15:45:11	Patient Selected
04/20/12	15:45:23	Batch Accepted
04/20/12	15:45:27	Log Off

This sequence of activities shows that a Caregiver logged on to the system, selected a patient, (probably) removed some items from the bins, accepted the batch to the patient and logged off. The items that were accepted in the batch can be seen in the **Activity Detail** report.

Re-Stocking Activities

Assuming you re-stock your PAR Locations once per day, one time each day you will see a series of **Re-Stock** events (one for each item re-stocked). This would generally happen around the same time each day. You should be able to compare these re-stock events to an order for the location and the quantities should match the quantities received for the order.

Date	Time	Event	Employee	Qty
04/20/12	16:49:57	Re-Stock		1
04/20/12	16:50:01	Re-Stock		11
04/20/12	16:50:04	Re-Stock		1
04/20/12	16:50:05	Re-Stock		2
04/20/12	16:50:08	Re-Stock		8
04/20/12	16:50:10	Re-Stock		8

Miscellaneous Activity (no charges lost)

If you see a **Lost Charge** and a **Re-Stock** event for the same item and same quantity back-to-back it was probably caused by someone temporarily removing one or more items from a bin and then replacing them. For example, taking things out of the bin to clean the bin.

Date	Time	Event	Employee	Qty	Patient	Item Number
04/20/12	17:01:46	Lost Charge		1		100529
04/20/12	17:08:35	Re-Stock		1		100529

Lost Charge (user tried but did not follow proper procedures)

The following **Lost Charge** is probably an indication that the Caregiver needs additional training. These events would indicate that John Doe logged on, selected a patient but then logged off before the item popped-up in the open batch screen.

Date	Time	Event	Employee	Qty
04/20/12	17:01:01	Log On	Doe, John	
04/20/12	17:01:06	Patient Selected	Doe, John	
04/20/12	17:01:12	Log Off	Doe, John	
04/20/12	17:01:46	Lost Charge		1

Lost Charge (user made no attempt to follow proper procedures)

When you see a **Lost Charge** on the report with no other related activities it is likely that the user entered the room and took an item and made no attempt to charge the patient.

Date	Time	Event	Employee	Qty	Patient	Item Number
04/20/12	09:20:56	Lost Charge		1		100529

Sorting Capabilities

Date and **Time** are the default sort sequence for this screen. You can sort by any column on the report (like most PAR Vision reports), however, since the entries on the report represent an audit trail of activity the most logical way to view the report is by date and time. This lets you see the events in the order that they occurred and logically analyze the activities.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Express Suspended Batches

This report provides a list of all the batches that have been suspended using the PAR Express system. This list should be reviewed regularly and the appropriate person notified when there is a suspended batch that should be accepted or deleted. A PAR Express batch can be suspended for a number of different reasons, including:

The patient to be charged could not be found in the list of patients. In this case the Caregiver can assign a **Pending Patient** name and suspend the batch until the patient name appears in the list.

- You can pre-pick a case for a patient and then suspend the batch until the case begins (usually done only in a procedural area). Once the case begins you can recall the suspended batch and add or remove items from the batch.
- A suspended batch will be created automatically by the system if the user fails to Accept the batch and the system automatically closes the batch based on the system "time-out" setting.

If you have been authorized to do so, you can also use this report to **discard** suspended batches that you do not want to accept to a patient or department. These are usually batches that were suspended for some reason but are now too old to be charged to a patient or not needed for some other reason. You can select the batches to be discarded and use the Discard button to remove the batches from the list. The batch information is still available for review using the [PAR Express Discarded Batches](#) report.

You can only recall a Suspended Batch and accept the batch using the PAR Express system.

Selection Criteria

PAR Location - Select the name of the PAR Location or Group to be reviewed.

Cost Type - You can select to use "Item Cost" or "Patient Cost" for the cost information displayed on both the Summary and Detail screens.

Summary Data Fields

Discard Batch - Check the box for the batches that you want to remove from the Suspended Batch list and then click the Discard button:



The batches will be moved to the Discarded Batch list and can be viewed by clicking the **Discard Batches** button on the tool bar.:



If the Discard button or Discarded Batches button is not available you can contact your administrator to see about having these permissions activated for your account.

Date and Time - The date and time the batch was suspended.

PAR Location - The name of the PAR Location where the batch was created.

Total Cost - This is the total cost of all the items that are suspended within the batch. This information will help you determine the financial impact if you discard this batch.

Entries - The number of items in the batch.

Employee - If each employee logs into the PAR Express system using a unique code, this column will contain the name of the employee who suspended the batch. You can contact this person to find out why the batch was not accepted.

Batch Identifier - If the batch was created because the patient to be charged was not in the patient list, this will be the **Pending Patient** name assigned to the batch by the user. Otherwise, this is the actual name of the patient or department that will be charged when the batch is accepted.

Detail Data Fields

Click on one of the rows on the Summary screen to see the details of the suspended batch. The Employee that created the batch will be displayed at the top of the screen. This is the person who should be contacted to accept or delete the batch.



The Employee information is only available on systems where each user must log on using a unique log on code.

Date and Time - The date and time the item was actually put into the batch.

Item Number - The item number of an item in the batch.

Item Description - The description of an item in the batch.

Qty - The quantity (dispensed or credited) of the item in the batch. A credit quantity will be negative and clearly marked as a credit.

UISS - The unit of issue for the item.

Item Cost - The unit cost of the suspended item.

Total Cost - The extended cost of this item in the batch (i.e., quantity time unit cost).

Expires - If the item requires an expiration date, this is the date that was entered (or scanned). If the item requires an expiration date but one has not yet been entered, this column will say **Missing**.

Lot - If the item requires a lot number, this is the lot number that was entered (or scanned). If the item requires a lot number but one has not yet been entered, this column will say **Missing**.

Serial - If the item requires a serial number, this is the serial number that was entered (or scanned). If the item requires a serial number but one has not yet been entered, this column will say **Missing**.

From Location - The name of the location from which the item was dispensed. Normally this will be the same as the location where the suspended batch was created, however, PAR Excellence does allow the user to dispense items from other locations in the hospital.

Sorting Capabilities

Date and Time are the default sort sequence for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Express Charges by Employee

If you use PAR Express to do patient charging and you require each employee to log in the PAR Express system with a unique ID, you can use this report to see the charges that have been done by each employee over a specified date range.

The summary screen gives you a high level overview of the number of charges done by each Caregiver. You can drill down on an employee to see the individual charges by date/time on the Detail screen.

Selection Criteria

PAR Location - Select a PAR Location (or Group) of All Locations. Only locations at which a PAR Express system is installed will show in the list.

Employee - Click in the box to see the names of all employees who have access to the PAR Express system. Select an Employee to see the information for that person or leave the field blank to see information for all employees.

Start Date - Enter the starting date for the analysis.

End Date - Enter the ending date for the analysis.

Summary Screen

Employee - The name of an employee who has permission to use PAR Express.

Charges - The total number of charges done by this employee over the selected date range.

Total Item Cost - The total cost of all items charged by this employee over the selected date range. This information is only meaningful if you maintain accurate item cost information in the PAR Excellence Item Master.

Total Patient Cost - The total patient cost for all item charged by this employee over the selected date range. This information is only meaningful if you maintain accurate patient cost information in the PAR Excellence Item Master.

Detail Screen

Click on an Employee name on the summary screen to drill-down to the detail screen to see the individual charges done by an employee.

Date/Time - The date and time the item was charged to the patient.

Dispensed To - The patient or department to which the item was charged.

Qty - The quantity of the item charged. A negative quantity would be a credit.

UISS - The unit of measure used to dispense the item.

item Number - The item number.

Item Description - The description of the items.

Item Cost - The item cost. This is the cost of a single item and does not reflect the total cost of the charge if the quantity is greater than one.

Patient Cost - The patient cost of the item. This is the patient cost of a single item and does not reflect the total patient cost of the charge if the quantity is greater than one.

Dispensed From - The PAR Location from which the item was dispensed.

Sorting Capabilities

The default sort sequence of the Summary screen is **Employee** name.

The default sort sequence of the Detail screen is **Date/Time**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Reconciliation Reports

Reconciliation Reports

The topics in this section describe the Reconciliation reports that are available in the PAR Vision system. You can access these reports using the links in the Reconciliation (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Reconciliation reports include:

[Reconciliation History](#)

[Reconciliation with Secondary iButtons](#)

[Reconciliation and Requisition Count Summary](#)

[Most Recent Reconciliation per Item](#)

Reconciliation History

Displays summary or detail information about all reconciliations done during a specified period of time. Reconciliation is the process of physically counting one or more items at a PAR Location (i.e., a physical inventory).

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Number - Enter a PAR Excellence item number to display the quantity on hand information for a single item.

Item Description - Enter an item description to display the quantity on hand information for a single item.

 For both the Item Number and Item Description, the program will "prompt" you through the selection of an item. Begin typing in the box and the program will display a drop-down list of items that begin with the number or description. As you continue to type, the list will be filtered down to contain only items with the prefix entered so far. At any time you can make a selection from the drop-down list to select that item.

Start Date and Time - Enter the date and time to start searching for transactions.

End Date and Time - Enter the date and time to stop searching for transactions.

 Because of the potentially high volume of data, this screen lets you start and end your search at a specific hour and minute of a day. Also, you can use the calendar pop-up to select your date by clicking on the calendar icon .

Show - Select the level of information you want to display.

- Summary - Display only the summary data for the reconciliations.

- Details - All Transactions - Display all the transaction form the reconciliations during the period.
- Details - **Adjustments Only** - Displays only the quantity adjustments that resulted from the reconciliations. In most cases this is the only detail data you really need to see. Other transactions simply verify that the counted quantity matches the quantity stored in the system.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

Summary Report

Date - The date the reconciliation was done.

PAR Location - The PAR Location where the reconciliation was done.

In Balance - The number of items reconciled (on this date) where the counted quantity matched the quantity on hand in the system.

Adjusted - The number of items where the counted quantity did not match the quantity in the system and an adjustment transaction was necessary.

Discarded - The number of transactions that were discarded. See the detail report for more information.



Items are discarded when the counted quantity differs so dramatically from the quantity on hand in the system that the system suspects there was a counting error, or more likely, an error entering the count into the touch probe.

Items Reconciled - The total number of items reconciled (should equal the sum of **In Balance**, **Adjusted** and **Discarded**).

Not Reconciled - The number of items at the location that were not counted.

Items Stocked - The total number of items at the location (should equal the sum of **Items Reconciled** and **Not Reconciled**).

Detail Report

Date and Time - The exact date and time the item was counted. This data is downloaded from the touch probe so it will reflect the actual time of the counting versus when the probe was downloaded.

PAR Location - The PAR Location where the item was counted.

Item Number - The item that was counted.

Item Description - The description of the item.

Expected - The quantity stored in the system (in the quantity on hand field).

Counted - The quantity counted during the reconciliation.

Adjusted - The quantity adjusted (the difference between **Expected** and **Counted**).

Unit of Issue - The unit of measure of the counted units.

Discard -The word *Discard* if the transaction was discarded due to a dramatic quantity mismatch. This item should be recounted, or if the counted quantity is correct, you can adjust the item manually.

Secondary - Y if the item was identified using a secondary iButton.

Sorting Capabilities

Date (descending) is the default sequence for the Summary report.

Date and **Time** (descending) is the default sequence of the Detail report.

In both case, this puts the newest reconciliations first in the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Reconciliation and Requisition Count Summary

The Reconciliation/Requisition Count Summary report is somewhat similar to the Reconciliation History report. However, the Count Summary report views the data from a different perspective, and is also more limited than the other report. These differences are discussed below.

- The Count Summary report organizes the data based on the display panel at which the Touch Probe is downloaded. The Count Summary report does not have access to any Touch Probe data which is downloaded directly into the PAR Client computer.
- On the other hand, the Reconciliation History report organizes the data based on the PAR Locations at which the items are stocked. It includes reconciliation data which is downloaded directly into the PAR Client computer as well as data downloaded into a display panel.

 This report will display batches that were downloaded at a PAR Display PC version or PAR Express computer. It only excludes batch downloaded at a PAR Client workstation (using the PAR Excellence foreground software).

- The Count Summary report has access to data only for the past few weeks. The Reconciliation History report generally has access to a year's worth of data.
- The Count Summary report has access only to summary data. The Reconciliation History report has access to detail information about each item that is reconciled.

Selection Criteria

Patient Display Board - Select a Patient Display Board (PDB) or all your Patient Display Boards.

Start Date/Time - Enter the starting date and time for the analysis.

End Date/Time - Enter the ending date and time for the analysis.

Data Fields

Downloaded From - The Patient Display Board at which the batch was downloaded. If the probe was downloaded at a PAR Express or PAR Display PC Version workstation it will be noted in this field rather than the PDB name.

Processed - The date/time the batch was processed.

In Balance - The number of items in the batch that were in balance. This will be zero if the batch only contained blue label requisitions.

Adjusted - The number of adjustments made as a result of this batch. This will be zero if the batch only contained blue label requisitions.

Total Recon Items - The total number of items reconciled in the batch. This will be zero if the batch only contained blue label requisitions.

Req Item Touches - The number of blue label requisitions that were included in the same batch. This will be zero if the batch only contained reconciliations.

File name - The name of the download file. This is typically only meaningful to someone in PAR Excellence technical Support.

Sorting Capabilities

The default sort sequence for this report is Date/Time processed.

See [Sorting](#) for more information on sorting PAR Vision lists.

Reconciliation with Secondary iButtons

A secondary iButton is used in a situation in which a supply is stored in more than one physical location, but these physical locations are considered to be a single PAR location. For example, on a nursing floor, all items might be stored in the supply room, but a small stock of a few commonly-used items is also maintained at the nursing desk. Secondary iButtons might also be used in a cath lab, O/R suite, etc., where duplicate supplies are stored in multiple rooms but all the rooms are considered to be part of a single PAR location.

There is an option in the "File Maintenance - PAR Locations" screen called "Add up secondary-iButton quantities when reconciling this location": If this option is set to "Yes", reconciliation is performed by touching each of the iButtons, along with the quantity at that physical location, associated with an item. The PAR Excellence system will then add these quantities together to determine the total QOH. If this option is set to "No", then you reconcile the item by manually calculating the total quantity in stock and then touching one item iButton and the total quantity.

The report "**Reconciliation of Items with Secondary iButtons**" is pertinent when the above option is set to "Yes".

In order to successfully reconcile an item with, for example, 1 primary iButton and 2 secondary iButtons, each of the 3 iButtons must be touched, along with the quantity associated with each. There is a time-out interval, which PAR Excellence support personnel can customize to your requirements, during which all of these touches must be completed and downloaded to be considered part of the same reconciliation. The default interval is 2 hours.

The report will show you any reconciliation touches involving items with secondary iButtons. There are 4 different status codes which can be displayed:

- **Completed** - means that all of the associated iButtons were touched, and the data downloaded, within the timeout interval, and the item has been successfully reconciled.

- **Pending** - means that this iButton touch is still current (the timeout has not yet occurred) and the system is waiting for the additional touches for this item in order to complete the reconciliation. The rightmost column of the report - "**iButtons**" - shows the total number of iButtons (1 primary iButton and 1 or more secondary iButtons) required to comprise a complete transaction for this item.
- **Expired** - means that this iButton was touched but the time-out interval expired before the additional iButtons were touched and downloaded. In this case, the "Notice of Reconciliation Touch Expiration" was printed.
- **Discarded** - means that all the associated iButtons were touched, but that the reconciliation data was discarded (and a "Reconciliation Discard" report was printed) because the specified quantity appeared to be incorrect. This feature filters out errors such as, for example, accidentally touching a quantity of "99" when there are actually 9 items on the shelf. If you feel that touches are being discarded which should be accepted, please contact the PAR Excellence support staff for tuning of this feature.

Selection Criteria

PAR Location - Select a PAR Location (or Group) or All Locations to see the reconciliation activity at the desired location(s).

Item Number or **Description** - To see the reconciliation activity for a single item, click in one of these boxes and enter the Item Number or Item Description. The list will be filtered as you type and when you see the desired item, click on it to select.

Start Date/Time - Enter the starting date and time for the analysis.

End Date/Time - Enter the ending date and time for the analysis.

Status - Select the status values you would like to see in the report. The meaning of the status values is described above.

Data Fields

PAR Location - The name of the PAR Location where the reconciliation activity took place.

Date/Time - The data and time of the reconciliation.

Item Number - The item number of the item reconciled.

Item Description - The description of the item.

Status - The status of this secondary iButton reconciliation. The status values are described above.

iButton - The actual iButton (or barcode) value.

QOH - The quantity reconciled with this button (or barcode).

iButton Location - The location of the iButton or barcode if this information was provided at the time the secondary button was created.

iButtons - The number of button touches (or barcode scans) during this activity.

Sorting Capabilities

The default sort sequence for this report is **PAR Location** and **Date/Time** within PAR Location.

See [Sorting](#) for more information on sorting PAR Vision lists.

Most Recent Reconciliation per Item

Displays the detail information about the most recent reconciliation done for each item at one or more PAR Locations. Reconciliation is the process of physically counting one or more items at a PAR Location (i.e., a physical inventory).

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Item Number - Enter a PAR Excellence item number to display the quantity on hand information for a single item.

Item Description - Enter an item description to display the quantity on hand information for a single item.

 For both the Item Number and Item Description, the program will "prompt" you through the selection of an item. Begin typing in the box and the program will display a drop-down list of items that begin with the number or description. As you continue to type, the list will be filtered down to contain only items with the prefix entered so far. At any time you can make a selection from the drop-down list to select that item.

Update Output - After you have entered or changed your Selection Criteria, click the **Update Output** button to refresh the screen.

Data Fields

PAR Location - The PAR Location where the item was counted.

Employee - The name of the user who downloaded the probe (or scanner) that contained the reconciliation data.

 Employee information is only captured when the reconciliation batch is downloaded at PC Version PAR Display or PAR Select client where individual log-on codes are assigned to each employee. It is assumed that the person who logged on to download the probe is the same person who did the reconciliation.

Date and Time - The exact date and time the item was counted. This data is downloaded from the touch probe so it will reflect the actual time of the counting versus when the probe was downloaded.

System - The quantity stored in the system (in the quantity on hand field).

Count - The quantity counted during the reconciliation.

Discard - The word *Discard* if the transaction was discarded due to a dramatic quantity mismatch.

Item Number - The item that was counted.

Item Description - The description of the item.

Sorting Capabilities

Date and Time (descending) is the default sequence for this report. This puts the items most recently reconciled first in the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Exception Reports

Exception Reports

The topics in this section describe the Exception reports that are available in the PAR Vision system. You can access these reports using the links in the Exceptions (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Exception reports include

[Exception Report](#)

[Lost Charges](#)

[Expiration Date Exceptions](#)

Exception Report

This report shows exception transactions in the PAR Excellence system for a selected date range. Exceptions include:

- Lost Charges
- Lost Credits
- Empty Bed transactions
- Pending transactions

The report will include valid charges and credits within the date range *but only for those items that also had exceptions*. This is to assist you in tracking down the reason for the exception.

Selection Criteria

PAR Location - Select a PAR Location or All PAR Locations.

Replenishment Source - Select a specific replenishment source or all sources.

Type - If you select all replenishment sources, you can limit the sources that are included by *Internal* or *External* sources.

Item Type:

- Chargeable - Show transactions involving chargeable items only.
- Non-Chargeable - Show transactions involving non-chargeable items only.
- Both - Show transactions for all items.

Exception Type:

- Pending and Empty Bed only
- QOH Adjustments only

- All Exceptions

Start Date - Enter the date to start searching for transactions.

End Date - Enter the date to stop searching for transactions.

 You can use the calendar pop-up to select your date by clicking on the calendar icon .

After all your selections are made, click the **Update Output** button to run the report.

Data Fields

Par Location - The location where the exception occurred.

Item - The item number and description.

Date and **Time** - The date and time of the transaction.

 You can use the calendar pop-up to select your date by clicking on the calendar icon .

Activity - The type of activity.

- *Lost Credit* - a credit that was not associated to a patient or department.
- *Lost Charge* - a dispense of a chargeable item that was not associated to a patient or department.
- *Empty Bed* - an item dispensed to an empty bed.
- *Pending* - an item dispensed to a pending patient.
- *Credit* - a valid credit that occurred in the same date/time range as an exception transaction for the same location and item.
- *Charge* - a valid charge that occurred in the same date/time range as an exception transaction for the same location and item.

 Empty Bed charges and Pending patient transactions are legitimate and supported transactions in the system. You are expected, however, to resolve these transactions by transferring them to actual patients in a timely manner.

Bed - the bed involved in the transaction (if applicable).

Qty - the quantity of the transaction.

Value - the value of the transaction based on the quantity and item cost.

Patient - the patient involved in the transaction (if applicable).

Sorting Capabilities

PAR Location, Item, Date and **Time** is the default sort field for this report. This puts *related* transactions (exceptions and valid transactions) together in the report to assist in resolving the exceptions.

See [Sorting](#) for more information on sorting PAR Vision lists.

Expiration Date Exceptions

In order for the system to track the expiration dates on the items, you must record the expiration date for an item when it is received and then again when it is dispensed. Normally this is a very simple and accurate process since you will be scanning the date from the packaging received from the manufacturer. On occasion, the information recorded in the system is not accurate and will result in an "expiration date exception". This screen displays those exceptions so you can correct any errors so the expiration date inventory will once again be accurate.

There are two types of exception that could occur:

- **Negative Quantity on Hand for an item on a specific Expiration Date** - This can occur if the expiration date is enter incorrectly during either receiving or dispensing. It can also occur if old inventory is "swapped out" for new without properly recording the transaction in the system.
- **Invalid Expiration Date** - This should happen very rarely, if ever, since the dates are validated for reasonableness by the scanner before they are ever downloaded to the system.

In general, the process to remedy an exception is to do a full reconciliation of the item at the PAR Location. When a full reconciliation is done, the system ignores all old quantities and dates and records the new quantities and dates that are entered during the reconciliation.

If no adjustments are made to the PAR Location quantity on hand (i.e., all changes only affect the quantities on specific dates), the reconciliation will not affect your compliance figures. For example, if the system says there are 5 items dues to expire in March and you reconcile 5 items, but the expiration date for these items is not until November, the expiration date inventory will be changed but there is no adjustment to the PAR Location QOH for that item.

Selection Criteria

Consigned or Purchased - select whether the report should contain only items that are on consignment from the manufacturer or purchased or both (default).

Data Fields

PAR Location - the PAR Location where this item is stocked.

Item Number - the PAR Excellence item number for the item.

Item Description - the description of the item.

Vendor Number - the Manufacturer's or Vendor's number for the item.

Expiration Date - the date the item will expire.

Days Left - the number of days remaining until the item expires (if the number is negative, the item is already expired).

Quantity - the quantity of the item due to expire on this date.

Consign - whether this item is consigned or purchased.

Last Received - The date this item (with this expiration date) was last received.

Last Issued - The date this item (with this expiration date) was last dispensed.

Last Adjusted - The date this item (with this expiration date) was last adjusted (such as; from a reconciliation).

- On each line of the report either the Quantity will be negative or the Expiration Date will be blank indicating the nature of the exception.

Sort Capabilities

PAR Location and **Item Number** make up the default sort sequence for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Lost Charges

Lost Charges occur when the quantity on hand for a **white** item is adjusted (either through the Adjust Quantity function or as a result of the Reconciliation process). If an item is taken and properly dispensed to a patient or department the system will automatically decrement the quantity on hand and no adjustments will be necessary. If an adjustment is necessary it is an indication that one (or more) items were taken and not properly attached to a patient. If these items are chargeable then the hospital may have lost some revenue from the patient.

This report shows you the number of (potential) lost charges by item based on the number of adjustments that were necessary.

You can also drill down on an item and see the actual adjustments that were made for that item.

Selection Criteria

PAR Location - Select a Par Location of All PAR Locations.

Item Type:

- **Chargeable** - Show lost charges involving chargeable items only.
- **Non-Chargeable** - Show lost charges involving non-chargeable items only.
- **Both** - Show lost charges for all items.

- There is no such thing as a lost charge for a *non-chargeable* item but, if you have a **white** non-chargeable item that must be adjusted, it is still an indication that the proper process is not being followed to dispense the item.

Start Date - Enter the date to start searching for transactions.

End Date - Enter the date to stop searching for transactions.

Summary Data

PAR Location - The name of the PAR Location where the lost charge occurred.

Charge? - Y or N indicating whether the item is chargeable at this location.

Item Number - The item number for the item that was adjusted.

Item Description - The description of the item.

Qty Lost - The total quantity adjusted for this item during the specified date range.

UISS - The unit of issue for the item,

Charge Code - The charge code for the item if it is chargeable.

Lost Revenue - The amount of revenue lost (based on the Patient Charge cost in the Item Master table).

Lost Cost - The cost to the hospital resulting from these lost charges (based on the Item cost in the Item Master table).

Details

You can drill down to the detail information by clicking on one of the items on the summary screen. The details screen shows the actual adjustments during the specified date range that resulted in the potential lost charge.

Date/Time - The date and time the adjustment was made.

Adjustment Qty - The quantity adjusted. A positive quantity is a lost charge and a negative quantity will offset a lost charge. If an item is taken without being assigned to a patient (or department) and then returned then the hospital has not lost any potential revenue.

Sorting Capabilities

Qty Lost (in descending order) is the default sort sequence for this report. The put the items with the most lost charges at the top of the list.

See [Sorting](#) for more information on sorting PAR Vision lists.

Physicians Reports

Physicians Reports

The topics in this section describe the Physician Reports that are available in the PAR Vision system. You can access these reports using the links in the Physician (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Physician reports include:

[Cases](#)

[Procedures History](#)

[Cases - Ad Hoc](#)

Procedures History

The Procedures History report will provide summary and details for surgical procedures that were performed and captured in the PAR Excellence system. In order for this report to contain meaningful information you must be tracking item usage by Physician and Procedure using one of the patient charging systems in PAR Excellence which provides that capability.

The PAR Excellence patient charging systems which allow for tracking Physician and Procedure are:

- PAR Express (Level A)
- PAR Select PC version
- PAR Procedure

Using one of the systems listed above, you are able to select the procedure that was performed and the physician who performed the procedure when you download a the items that were used on the case.

Selection Criteria

Physician - Select a Physician or All Physicians the see procedures performed by the select physician(s).

Employee - Click in ths box to select an employee to see only the procedures downloaded by that Caregiver. The list will be filtered as you type the name. When you see the desired employee, click on the name to select.

Start Date - Enter the starting date for the analysis.

End Date - Enter the ending date for the analysis.

Procedure - Select a Procedure or All Procedures to see information about all or a specific surgical procedure.

Summary Screen

Procedure - The name of a surgical procedure that was tracked in the PAR Excellence system.

Times Performed - The number of times that procedure was performed in the selected date range.

Detail Screen

Click on a Procedure to see the detail information about that procedure.

Physician - The name of the Physician who preformed the procedure (if the physician information was captured).

Employee - The Caregiver who accepted the patient charges for this case (if employee information is being captured by the system).

Procedure - The Procedure that was performed.

Date/Time - The date and time the patient charges were accepted for this procedure.

Patient Number - The account number assigned to the patient.

Patient Name - The name of the patient on whom the procedure was performed (the patient who was charged on the case).

Sorting Capabilities

The default sort sequence for the Summary screen is **Procedure Name**.

The default sort sequence for the Details screen is **Date/Time**.

See [Sorting](#) for more information on sorting PAR Vision lists.

Cases

The PAR Express system provides a feature that will let you track the Physician and Procedure associated to a group of items charged to a Patient. All of this information combined is referred to as a Case. This report will show you all the Cases performed over a specified date range with the ability to drill-down to see the items used on the Case.

A Case can consist of one or more batches of items charged to a patient for one or more procedures performed by a single physician. These item charges and procedures may occur over multiple days. This report summarizes all the information into one grouping so you can see everything related to the Case in one place.

A special version of this report called [Cases - Ad Hoc](#) can be accessed using the  **Ad Hoc** button on the tool bar.

Selection Criteria

Physician - You can select a specific physician to see all cases done by a doctor or you can select All Physicians.

Procedure - Select a procedure or All Procedures. If you select a specific procedure along with all physicians, you can compare how much each doctor spent to perform the same procedure.

Patient - If you are looking for a Case for a specific patient, you can enter the patient account number or patient name to see all cases for that patient. As you type in either field the list will be filtered down until you see the patient you are looking for and then click on the patient to select.

Start Date - The beginning date in the range to look for Cases.

End Date - The ending date in the range to look for Cases.

Item Cost or **Patient Cost** - You can see the total cost of each case (and the detailed cost by item) using either cost to the hospital (item cost) or the cost charged to the patient (patient cost).

Update Output - Click this button after you have selected the desired dates to begin the report.

 If the charges for a case span multiple days, the date and time of the case is the date and time of the first set of charges.

Summary Data Fields

Date and Time - The date and time of the first set of charges for the Case.

Physician - The physician who performed the Case.

Patient Number - The account number for the patient.

Patient Name - The name of the patient.

Total Cost - The total cost to the hospital (item cost) or to the patient (patient cost) for the supplies used on the case.

Procedure - The procedure that was performed. If multiple procedures were performed on the same case this is the first procedure performed on the case (unless you were searching for a specific procedure then you will see all cases for that procedure even if it was not the first procedure performed).

Click on a Case to drill-down to the detail information for the Case.

Detail Data Fields

Date and Time - The date and time the item was dispensed to the patient (or when the procedure was attached to the case).

Activity - The activity for this line item. If this is an item that was charged to the patient the value will be *Dispense* or *Credit*. If this line item represents a procedure that was performed on the Case, the value will be *Procedure*.

Bed - The bed number if the patient was assigned to a bed, otherwise it will say Unknown.

Qty - If this activity is for an item, this will be the quantity of the item dispensed.

UISS - The unit of issue for the item that was dispensed.

Item Number - The item number dispensed.

Item Name - The description of the item dispensed.

Charge - the charge code for the item.

Cost - The item cost or patient cost (depending on the selection made on the Summary screen) for each supply used on the case.

PAR Location - The location from which the item was dispensed.

Employee - If your system requires each employee to log into PAR Express with a unique access code, this column will tell you the employee who accepted the charges.

Sorting Capabilities

Date and **Time** are the default sort sequence for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Expirations

Expirations

The topics in this section describe the Expiration reports that are available in the PAR Vision system. You can access these reports using the links in the Expiration (Reports) section of the PAR Vision Menu (on the left side of the dashboard).

The Expiration reports include:

[Expiring Items](#)

[Cycle Count Sheets](#)

[Cycle Count Status](#)

[Cycle Count Status Detail](#)

Expiring Items

The Expiring items list tell you the items that due to expire soon. If this feature is installed, the system keeps track of the expiration date of all items as they are received into inventory. Then, as items are dispensed, the expiration date for the item is recorded and that item is removed from the "expiration date" inventory. Under normal circumstances, the oldest items will be dispensed first and newer items will remain in inventory so nothing in inventory will be close to expiring.

On occasion, however, items will approach their expiration date while still sitting in inventory. This will happen most often on "slow-moving" items. It could also happen, however, on a faster moving item if the people dispensing supplies do not use the oldest inventory first. It is important to know when items are approaching expiration so they can be used before they expire or returned to the manufacturer for newer stock.

Selection Criteria

Consigned or Purchased - select whether the report should contain only items that are on consignment from the manufacturer or purchased or both (default).

Days until Expiration - normally you will only be concerned about items that are approaching their expiration date, so you can select item that are going to expire in the next 90 days (default), the next 60 days, or all item with an expiration date.

Data Fields

PAR Location - the PAR Location where this item is stocked.

Item Number - the PAR Excellence item number for the item.

Item Description - the description of the item.

Vendor Number - the Manufacturer's or Vendor's number for the item.

Expiration Date - the date the item will expire.

Days Left - the number of days remaining until the item expires (if the number is negative, the item is already expired).

Quantity - the quantity of the item due to expire on this date.

Consign - whether this item is consigned or purchased.

Last Received - The date this item (with this expiration date) was last received.

Last Issued - The date this item (with this expiration date) was last dispensed.

Last Adjusted - The date this item (with this expiration date) was last adjusted (such as; from a reconciliation).

 An item will appear in this list multiple times if you have inventory that expires on multiple dates.

 The dates at the end of the list (Last Received, Last Issued, Last Adjusted) are intended to help you determine why you have items in inventory that are ready to expire. For example, a large number of days between the last receipt and the last issue might indicate a slow-moving item. Or, if the last issue date was long ago, maybe this item has been misplaced (i.e., in the wrong spot) so it gets overlooked when items are being dispensed.

Sorting Capabilities

Days Left is the default sort field for this report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Cycle Count Status

The Cycle Count Status reports provides information about how current you are in the cycle counting process at each PAR Location. This report is displayed when you click the Cycle Count information message in the Dashboard statistics. The report shows you how many items are currently scheduled to be counted and, more importantly, how many items are behind schedule in the counting process. The PAR Locations with the most items behind schedule appear at the top of the report.

You can use this report to help determine where you will assign resources if you have people who do reconciliations at multiple locations. Obviously, the locations that are furthest behind schedule need the most help.

Data Fields

PAR Location - The name of the PAR Location.

Last Scheduled - The last time items were scheduled to be counted at this location.

Last Counted - The last time a reconciliation was done at this location.

Currently Scheduled - The number of items that are currently on the cycle count schedule to be counted.

Behind Schedule - The number of items that are behind schedule.

Sorting Capabilities

Behind Schedule is the default sequence for this report so the locations with the greatest number of items behind schedule will appear at the top of the report.

See [Sorting](#) for more information on sorting PAR Vision lists.

Drill-Down Levels

Click on a PAR Location to see the [Cycle Count Status Detail](#) report. The detail report will show you cycle count information for all items at the location but will focus on the items that are currently scheduled to be counted (and behind schedule).

 If you are planning to begin reconciling items at a location, you should use the [Cycle Count Sheets](#) report to get the list of items to be counted since it is limited only to the items that are currently schedule to be counted.

Cycle Count Status Detail

This report is displayed when you drill-down on a PAR Location from the Cycle Count Status report.

The report contains cycle count information for every item at a PAR Location that is configured to use the Cycle Count function. The default sequence of the report lets you focus on those items that are currently scheduled to be counted, however, you can also look ahead to see the items that will likely be contained on upcoming count sheets.

Selection Criteria

PAR Location - Select a PAR Location from the list. Initially, the value is set to the location selected on the summary screen, but you can select another location without going back to the summary screen.

 The list only contains PAR Locations that have been configured to use the Cycle Count function.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Vendor Number - The vendor's or manufacturer's item number.

ABC - The classification for this item. "A": items are high value items and "C" items are low value.

Shelf Location - The shelf location of the item at the PAR Locations (if these values are assigned).

Scheduled Date - The last time this item was scheduled to be counted.

Last Counted - The last time the item was actually counted.

Days After Schedule - If the item is currently scheduled to be counted but has not been counted, this is the number of days since it was scheduled to be counted.

Sorting Capabilities

The default sequence of this report is by **Days After Schedule** (descending), **Last Counted** (ascending) and **Scheduled Date** (descending). This sequence puts the items currently schedule to be counted at the front of the list. After the items that are currently on the schedule will be the items most likely to be included on upcoming count sheets.

 Because several factors affect the scheduling of items, you cannot use this list to exactly predict the schedule.

See [Sorting](#) for more information on sorting PAR Vision lists.

Cycle Count Sheets

Cycle Counting provides a systematic process for reconciling your PAR Locations inventories. The system will tell you the items to be reconciled on each of the count days you have scheduled. When you follow the schedule recommended by the system, all items in the inventory will be reconciled at least one time within each cycle.

Each location can have three different cycle lengths so you will reconcile high value items more often than lower value items. The value of an item is determined by multiplying the average daily usage times the item cost. Items are separated into three classes based on value:

- "A" class items are the highest value items at the location. Normally there are not many "A" class items but they are reconciled much more frequently than the lower value items.
- "B" class items are the middle value items. These are generally the items with moderate cost, but high usage. "B" class items are reconciled with normal frequency.
- "C" class items are the low value items in the inventory. These items are reconciled very infrequently (as little as once per year).

Your system administrator has determined the Cycle Counting parameters for each location. Those parameters include:

- The number of weeks in each cycle. For example, the "A" cycle is 12 weeks, the "B" cycle is 26 weeks and the "C" cycle is 52 weeks.
- The days each week you will count (i.e., reconcile) items. These are referred to as the count days.

On each scheduled count day, you can print a Cycle Count Sheet to find out which items are to be reconciled today.

Selection Criteria

PAR Location - Select the PAR Location for the count sheet you want to print.

Data Fields

Item Number - The PAR Excellence item number.

Item Description - The item description.

Vendor Number - The manufacturer's or vendor's number for the item.

ABC - The classification for this item. "A" items are high value items and "C" items are low value.

Shelf Location - The shelf location of the item at the PAR Location.

Scheduled Date - The date the item was scheduled to be counted. If this is not today's date, then this item was schedule to be counted on a previous count day but was not counted on that day. It will continue to show on the count sheet until it is counted (i.e., reconciled).

Last Counted - The date the item was last reconciled (prior to today). This is provided for informational purposes only, however, if you are getting behind schedule in your counting, you may want to consider counting the items with the oldest last counted date.

Sorting Capabilities

Shelf Location is the default sort sequence for this report. If shelf locations have been defined, this will put the sheet in the proper order for counting the items.

See [Sorting](#) for more information on sorting PAR Vision lists.

Data Cleansing

Data Cleansing

The topics in this section describe the data cleansing utilities that are available in the PAR Vision system. You can access these utilities using the links in the Data Cleansing section of the Dashboard.

The Utilities in this section include:

[Chargeable and Non-Chargeable Items Across Multiple Locations](#)

[Chargeable Items without Charge Codes](#)

[Unit of Measure Differences Across Multiple Locations](#)

Chargeable and Non-Chargeable Items Across Multiple Locations

This utility can be used to review the items in the system that are marked chargeable in one or more locations but non-chargeable in others. Normally an item will be either chargeable or non-chargeable hospital-wide, so entries in this list may identify data errors in the system. In some situations, however, it may be perfectly legitimate for an item to be marked as chargeable one place and non-chargeable in other places.

You can also use this change the chargeable/non-chargeable for items that have been setup incorrectly.

Summary

The summary screen shows you a list of all the items that fall into this category of being chargeable in some locations for non-chargeable in others. If you see an item in the list that should be chargeable (or non-chargeable) everywhere you can click on the item to display the detail screen where you can make changes.

Item Number - The item number.

Item Description - The item description.

Vendor/Mfg Number- The vendor or manufacturer's number for this item.

Item Type - The item type indicator. This information is displayed to help you decide if the item should be marked chargeable or non-chargeable if there is a discrepancy. In a location that is not using PAR Bins all Blue items would normally be marked non-chargeable and white items could be either chargeable or non-chargeable.

Locations Chargeable - The number of locations where this item was found and set to be Chargeable.

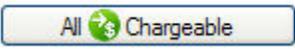
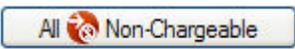
Locations Non-Chargeable - The number of locations where this item was found and set to be Non-Chargeable.

Details

After clicking on an item on the Summary screen, you will see a graphical display of the locations where the item is stocked with an indicator whether it is chargeable or non-chargeable at each location.



In the example above, the item is Chargeable in Central Supply and Non-Chargeable in ICU and the Operating Room. The following chart describes the icons you will see on this screen and what each one of them does.

	Click this button to change the item to Chargeable at all PAR Locations.
	Click this button to change the item to Non-Chargeable at all PAR Locations.
	Indicates the item is Chargeable in the corresponding location.
	Indicates the item is Non-Chargeable in the corresponding location.
	Click this button to change the item to Chargeable at the corresponding location.
	Click this button to change the item to Non-Chargeable at the corresponding location.

Chargeable Items without Charge Codes

In order for the charge interface to work properly, all chargeable items must have a **Charge Code**. This utility can be used to find and review items in the chargeable database that do not comply with this rule. Once the items are identified, the utility lets you correct the problem in one of two ways:

- Change the item to Non-Chargeable.
- Add a charge code so the item passes across the interface properly.

Procedures

When the utility is selected it will automatically display all the chargeable items that do not have a Charge Code in a list similar to the graphic below.

Item	Charge Code	Location
1501500 COVER PROBE SURE TEMP	<input type="text"/>	 Operating Room

For each item in the list you can choose how you want to correct the problem. The system does not prohibit you from exiting the utility without fixing all problems so if additional research is required for an item, you can skip the item and fix it at some time in the future.

In the empty box in the Charge Code column, enter a charge code for the item. After you have entered the code, press the tab key to move to a different field on the screen. The utility will add the charge code to the database for the item and the problem is fixed.



Click this button to change the item to **Non-Chargeable** at the corresponding location. This will correct the problem because non-chargeable items do not need a charge code.

Unit of Measure Differences Across Multiple Locations

This utility lets you review items that are setup for different Unit of Issue and/or Unit of Replenishment across multiple PAR Locations. Items that appear in this list do not necessarily indicate a problem in the system. It is not unusual for an item to be issued or replenished in different units at different locations but it may not be common (depending on your procedures).

As you review the list, if you see an item that is not set up correctly in one or more locations, you can change the Unit of Issue or Unit of Replenishment on this screen to correct the discrepancy.

Procedures

When the utility is selected it will automatically display all the items that have different Unit of Issue or Unit of Replenishment in different PAR Locations in a list similar to the graphic below.

Item Number	Item Description	UISS	Per	UREP	PAR Location
1501500	COVER PROBE SURE TEMP	EA	10	BX	Central Supply
		EA	10	BX	ICU
		EA	1	EA	Operating Room

Change the Unit of Measure

If one of the items in the list has an incorrect Issue Unit of UOM or Replenishment UOM, click on the button in the "**UISS per UREP**" column. A pop-up screen will appear where you can make changes to the Units of Measure.

Change UISS/UREP Dialog

Use the controls below to change the UISS, UREP and factor for item **1501500 COVER PROBE SURE TEMP** for location **Central Supply**

1 LUM (EA) per EA 10 BX 10 LUM (EA) per

Cancel Create New Unit OK

Use the two drop down lists to change the either the Issue UOM or the Replenishment UOM. For example, if the item should be replenished by the EACH, click the drop down box on the right and select **EA**.

If you want to create a new Unit of Measure, click the **Create New Unit** button.

After you have set the Units of Measure the way you want them, click the **OK** button. If you have corrected the discrepancy, the item will automatically be removed from the list.

Change the Factor

The factor is the number of items contained in the unit. For example, if batteries are packaged 6 to a box, the factor for batteries EA to BX is 6. In the sample below the item is set for 10 items to a box.

This dialog also displays the Unit of Measure which is the "lowest unit of measure" (LUM). The LUM is the unit of measure on which every other unit of measure is based. You can use this function to change the LUM by clicking the **<-- Set as LUM** button.

Set Unit Factor

Specify the number of this unit there are in the LUM for this item.
This dialog can also be used to change the LUM for this item.

LUM Per Unit -- Set as LUM
EA 10 BX

Cancel OK

Tools and Utilities

Tool and Utilities

The topics in this section describe the miscellaneous tools that are available in PAR Vision. You can access these tools from the PAR Vision Dashboard.

The tools include

[Item Locator](#)

[PAR Bin Items Without Reference Weights](#)

Item Locator

The Item Locator utility which can be loaded from the dashboard can be used to lookup an item at one or more PAR Locations. To load the utility, click on the item Locator icon on the dashboard:

Selection Criteria

Enter your selection criteria in the "filter" fields (the white boxes above each column in the table). You can enter a value in any, or all, of the filter fields. You can even enter partial values, such as, NON in the Vendor Number field to find all items with a vendor number beginning with "NON". Enter as much information as you know about the item(s) you are trying to locate in order to retrieve the least number of records.

After you have enter all your selection criteria, click the **Apply Filter >** button.

PAR Location - The PAR Location where the item is stocked.

Vendor Number - The manufacturer/vendor number for the item.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Data Fields

The data displayed for each item that matches the search criteria includes:

PAR - The PAR level for the item.

QOH - The current quantity on hand for the item.

Shelf Location - The shelf location (at the PAR Location) where the item is stored (if shelf locations are defined).

PAR Location - The PAR Location where the item is stocked.

Vendor Number - The manufacturer/vendor number for the item.

Item Number - The PAR Excellence item number.

Item Description - The item description.

Repl. Source - The replenishment source for the item.

Charge Code - If the item is chargeable, the charge code for the item will be displayed. This column is blank for non-chargeable items.

Sort Capabilities

Item Number is the default sort order for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

PAR Bin Items Without Reference Weights

This report will show you all items that are registered to a PAR Bin scale but do not have a valid reference weight in the system. The reference weight is one of the key pieces of information used by the system to calculate the quantity on hand. The reference weight represents the unit weight of one item in the unit of issue. The system divides the total weight in the bin by the reference weight to calculate the quantity on hand for the item.

Without a reference weight the system cannot calculate the quantity on hand and all items that do not have a reference weight are automatically set for "do not order" until a weight is entered into the system. Normally, you cannot register an item to a scale without a reference weight, however, the system will allow you to override this requirement during the setup process if you have no stock on hand with which to weigh the item.

You should review this report periodically and if there are any items in the list you should use the Re-Weigh function on the setup cart to record an item weight so the system can begin ordering the item.

Data Fields

Item Number - The item number.

Item Description - The description of the item.

UISS - the unit of measure for this item that is missing a reference weight. An item can have more than one reference weight in the system. For example, if the item is issued by the EA in one location and issued by the BX in a different location there will be a separate reference weight for each of those units of measure.

Bins at PAR Locations - This is the number of scales and locations where this item is registered without a reference weight. For example, the column might say *2 bins at 2 locations*.

Sorting Capabilities

Item Number is the default sort order for this screen.

See [Sorting](#) for more information on sorting PAR Vision lists.

Administration

Administration

The topics in this section describe the Administration functions that are available in the PAR Vision system. You can access these functions using the links in the Administration section of the PAR Vision Menu (on the left side of the dashboard).

The Administration functions include:

[User Administration](#)

[User License Summary](#)

[Location Administration](#)

[System Administration](#)

User Administration

This utility is used to authorize users for the PAR Vision system. Each person who uses PAR Vision must be added to the PAR Vision users table using this utility. In addition to defining the users who can access PAR Vision, for each authorized user, you can define two levels of security:

- The functions that the user is allowed to use.
- The data that the user is allowed to see.

Access to this function should be limited to PAR Vision administrators.

This function is also used to monitor your PAR Vision licensing compliance. More detail on this subject can be found in the [User License Detail](#) section.

Procedures

User Lookup

1. User the drop down box under the **Current User** heading to select the user you want to display.
2. As soon as you make your selection, the information for that user will be automatically displayed on the screen.



The user record for the current PAR Vision user is displayed when the user Administration screen is first displayed.

New User

To give a new user access to the PAR Vision system you must know the **User Name** that the person users to log onto the Windows domain (or workgroup). This is the name that PAR Vision will use to look up the user in the security table.

1. Enter the person's Windows log on name in the blank box to the left of the **ADD New User** button.

2. Now click either the **Add New User** button or the **Duplicate current user to this new user** button.

The **Add New User** button will create the user record with a default set of privileges. After the user record has been created, you can customize the privileges for this user.

The **Duplicate current user to the new user** button will add the new user with privileges matching the user that is currently displayed on the screen. Prior to using this button you should lookup a user whose job function is similar to that of the person you are now creating. After the user record is created, you can still customize the privileges for the user, but the number of changes should be less than if you started with the default privileges.

3. After the user record is created (using one of the two buttons described above), the utility will display the new user as the **Current User** on the screen. You can now customize the privileges (if necessary) for this user. See **User Privileges** (below) for more information.
4. After changing any privileges, click the **Submit Changes** button to save the changes.

Change the Privileges for a User

1. Start by looking up the record for the user to be changed (see **User Lookup** above).
2. Make changes to the functions the user is allowed to use and/or the Locations he/she is allowed to see. There are four categories of functions (**Dashboard**, **WebReq**, **Data Analysis** and **Caregiver**). Click on **Show** for the desire category to work with those functions.
3. Click the **Submit Changes** button to save the changes.

Delete a User

1. Start by looking up the record for the user to be deleted (see **User Lookup** above).
2. Click the **Delete User** button.

 You cannot delete your own user record.

User Privileges

System Status Dashboard - The PAR Vision dashboard (home page). All users get this permission and it cannot be revoked.

User is an Administrator - Access to User Administration and System Administration. This privilege should only be given to users who will help administer the PAR Vision system. You cannot remove this privilege from yourself, but you can remove it from other administrators.

Patient Name Information - This can be used to prevent a user from seeing patient names. If a person's job function does not require he/she see patient names, then it is good practice to set this field to **<don't display>**. If a person must see patient names, then use this field to set the desired format of the name.

PAR Vision Functions - Functions a user can access in PAR Vision.

- There are four categories of functions (**Dashboard**, **WebReq**, **Data Analysis** and **Caregiver**). Click on **Show** for the desire category to work with those functions.
- For each major function and sub-function in the system there is a corresponding check box on the screen. The major functions are left aligned and the sub-functions are indented.

- Check the box if the user should be allowed to use this function (un-check the box to prevent access to the function). If you un-check the box on a major function, the access to all sub-functions is also removed automatically (even if the boxes are still checked).
- Click on the **Locations** button to add/change the PAR Locations a user can see when using this function. PAR Location visibility is maintained on the [Location Administration](#) screen.

Drill-Down Levels

1. Click on one of the **Location** buttons to drill down into the [Location Administration](#) function.
2. Click in the header portion of the Licensing information to drill down to the [User License Detail](#) function.

Location Administration

For any function whose data is organized by PAR Location you can allow or disallow a user to view data at the PAR Location level. There are actually two reasons why you would not grant access to PAR Location information for a user:

- The information at the location is sensitive, so only user with a need to know should have access to the data.
- If the user's job function has no interest in one or more PAR Locations, you can remove access to those locations to simplify the screens and reports for that user (i.e., the screen and reports will contain less data).

Normally, you will give access to the same locations for all functions, however, the flexibility exists to set different locations for different functions.

Procedures

1. Click on the **Location** button next to a function on the User Administration screen.

 if the **Location** button is currently **Green**, then the user has access to all locations for that function. If the button is **YELLOW**, then some of the locations have been removed for that function.

2. The Location Administration screen is displayed showing all PAR Locations and Groups. Each location that is viewable by this user has a check in front of it. If the user is restricted from seeing the data at a location, the box is empty.
3. Check or un-check each Group or Location box as appropriate for this user.
4. You can use the Set all **On** and **Off** buttons to set or remove the checks for all Locations and Groups.
5. After all boxes are set, click either the **Apply to this Screen** button or the **Apply to All Screens** button.

Apply to this Screen - Use this button if you want to set different locations for each function for this user.

Apply to All Screens - Use this button to give a user the same location access for all functions.

i After using the **Apply to All Screens** button, you can still use the Locations button for other functions and add or remove locations for that specific function. You would then click **Apply to this Screen** for the customized location set.

Remember, when you are setting the locations for any function, if you click the **Apply to All Screens** button, the locations for all function will be reset to match the current location set.

User License Summary

At the top of the User Administration screen (under the user name selection fields), there are four boxes that keep you notified about the status of your PAR Vision licenses. Par Vision Licenses are purchased for four areas of the system. Once you have reached the licenses limit for a given area, you will not be allowed to give a user access to that area until you revoke the privilege from another user (or delete a user who has that privilege).

Dashboard - This is the basic access to PAR Vision. Since all users get this privilege and it cannot be revoked, when this limit is reached, you will not be able to add new users to the system until you delete a user.

Webreq - Access to Web Requisitions. This function should be reserved for Material Management staff that use PAR Vision to do requisitioning of inventory.

Data Analysis - Access to the planning reports that are contained in the Data Analysis section of the menu. These licenses are most useful to Materials Management managers that will make decisions on PAR levels and patient cost.

Caregiver - Access to the Caregiver Analysis functions. These licenses should be reserved for the Caregiver's management who will analyze and monitor usage compliance.

Procedures

Each of the four licensing sections has a **Set all On** and **Off** button. You can click these buttons to quickly *allow* or *remove* all functions in a section for the selected user.

You can click in the header portion of any section to see the User License Detail screen.

Dashboard: 4 used, Unlimited licensed

Data Fields

Summary

Component - A licensing component.

Current Number of Users - The number of user who are currently authorized for functions that make up this component.

Number of Licenses - The number of licenses you are authorized to use for this component.

User Detail

User - The name of a PAR Vision user.

Dashboard - A dot (•) in this column means the user is utilizing one of your Dashboard licenses.

WebReq - A dot (•) in this column means the user is utilizing one of your Web Requisition licenses.

Data Analysis - A dot (•) in this column means the user is utilizing one of your Data Analysis licenses.

Caregiver - A dot (•) in this column means the user is utilizing one of your Caregiver licenses.

 A person with the System Administrator privilege will also consume a Data Analysis license. If that same person also has Data Analysis functions, it will still only count as one license.

Sorting Capabilities

Click on one of the licensing headers to group all users with that type of license at the top of the screen. For example, to see all users with a Data Analysis license, click on the heading in the **Data Analysis** column.

System Administration

This function is used by the PAR Vision administrator to set certain system wide values that affect the display of some of the key metrics in the system. The changes made on this screen apply to all users, although, some of the parameters can be set by PAR Location, so those settings would only affect the users who can view the specified location(s).

Contact information

You can customize the information that is displayed to the user if an error occurs while trying to display one of the PAR Vision web pages. The default message instructs the user to retry and if the problem persists call PAR Excellence Customer Support. You may want to change this message to tell users to call your own internal Help Desk first so you can track system errors and outages.

Enter the name of the organization to be contacted and the phone number or extension.

Compliance Alerts

This setting controls the percentages that trigger the dashboard alerts for compliance (or lack thereof). Good or poor compliance is a very "hospital specific" measurement, so one setting may not apply to all organizations. The default settings that are delivered with the system represent what PAR Excellence believes to be good compliance in an average organization. Circumstances at your hospital may warrant changing these values either higher or lower.

Chargeable and **Non-Chargeable** - Use the check boxes to indicate the type of items that should be included in the compliance alerts. For example, many hospitals do not track compliance for non-chargeable items.

% - Use these boxes to indicate when the alert should change from red to yellow to green. The alert ball will be red until the compliance percentage hits the value indicated in the first box and then it turns yellow. When it reaches the value in the second box, it will turn green.

Caregiver Compliance Alerts

Similar to the overall compliance measurements, the Caregiver Compliance measurements can vary from hospital to hospital. In addition, these alerts might differ from the hospital's overall compliance measurements and even differ by PAR Location. The settings in this section let you fine tune the Caregiver Compliance alerts so they are meaningful to management and to Caregivers under all circumstances.

Breakdown Details - This section lets you specify the type of items to be included in the Caregiver Compliance measurements at the PAR Location level. The default settings are displayed at the top of the table. To change these setting for any or all PAR Locations, follow the procedures outlined below:

1. Click the **Add** button to the left of the table.
2. A line will be added to the table with a check box for **Chargeable** and **Non-Chargeable** and a button that says **<Click to add locations>**.
3. Check or un-check the type of item to be included (or excluded) in the compliance alert for one or more PAR Locations.
4. Click the **<Click to add locations>** button.
5. A pop-up box will appear showing all Groups and PAR Locations. Check the box in front of the groups and Locations to which these settings apply. There is a **ALL On** button at the top of the pop-up that you can click to easily check all the boxes (if you want these setting to apply to all PAR Locations).

After the Groups and Locations are set, click the **OK** button at the top of the pop-up.

1. The button will now display **All Locations**, or the **names** of the selected locations, or **<Click to add locations>** (if no locations were selected).
2. You can now use the Add button again to set the Chargeable/Non-Chargeable setting for another group of locations, or you can move on to setting the Alert Color Breakpoints.

Alert Color Breakpoints - This section lets you specify the when the Caregiver Compliance alerts should change color (red, yellow, green). The default settings are displayed at the top of the table. To change these setting for any or all PAR Locations, follow the procedures outlined below:

1. Click the **Add** button to the left of the table.
2. A line will be added to the table with two boxes % to set the yellow breakpoint and the green breakpoint and a button that says **<Click to add locations>**.

3. Enter the percentage at which the ball should change from red to yellow and then enter the percentage when it will change from yellow to green.
4. Click the **<Click to add locations>** button.
5. A pop-up box will appear showing all Groups and PAR Locations. Check the box in front of the groups and Locations to which these settings apply. There is a **ALL On** button at the top of the pop-up that you can click to easily check all the boxes (if you want these setting to apply to all PAR Locations).
6. After the Groups and Locations are set, click the **OK** button at the top of the pop-up.
7. The button will now display **All Locations**, or the **names** of the selected locations, or **<Click to add locations>** (if no locations were selected).
8. You can now use the Add button again to set the percentages for another group of locations.

 After a set of groups and locations have been added to the table, there will be a **Delete** button to the left of that row in the table. You can click the **Delete** button to remove the row from the table and that set of locations will revert back to using the default values.

PAR Vision Browser Timeout

Use this setting if you want PAR Vision to automatically shut down after a period of time with no activity. It is not uncommon for a user to complete their work and walk away from the computer without closing the browser. The data displayed on the screen is then viewable by anyone in the area at the time (including, possibly, patients and visitors).

Enter the number of minutes when, after no activity, the PAR Vision browser will automatically close so sensitive data is not in full view of unauthorized people.

PAR Level Analysis Populations

The system provides two options for the **#Days of Use** breakdown in the [PAR Level Analysis](#) report.

The breakdown in Option 1 (which is the default) matches the breakdown used for the PAR Level Recommendations reports.

The breakdown in Option 2 more closely matches a *day/week/month/quarter/year* breakdown (although the number of days is always based on yesterday being "day one" so only on January 1 do the breakdowns actually match the day/week/month/quarter/year of the calendar). Select the option that will provide the best information for your installation.

PAR Level Analysis Period

The system provides two options for the amount of data to be used when consolidating the data for various reports. The information can be based on **6 months** of activity or **1 year** of activity. This change will affect the number of day's activity used for the [PAR Level Analysis](#), [PAR Level Recommendations](#), [SKU Reduction Recommendations](#), [Average Monthly Usage](#) and [Consumption Analysis](#).

This setting will not affect the analysis for the majority of the items. It may have an affect on the analysis of very slow moving items or items that tend to have heavier usage during certain times of the year.

Appendix

Appendix

This section provides help on functions that are common to many of the PAR Vision screens. The Sorting topic tells you how to change the default sort sequence for any PAR Vision report. The Exclusions topic describes how to "fine tune" the Hit List screen that is provided in several reports.

[Sorting](#)

[Export](#)

[Exclusions](#)

Sorting

All of the lists that are displayed in PAR Vision can be sorted ascending or descending by virtually any column in the list.

Click on the header for any column of the report to sort on that column. Clicking on the same column again will toggle the sort in the opposite direction. A small yellow triangle indicating the sort direction (▼ or ▲) appears above the current sort column.

In addition to this simple sorting on a single column, you can set up more complex multi-column sorting for a screen.

Sorting on Multiple Columns

1. Hover the cursor over any sortable column and a "sorting prompt" will appear .
2. Click on the prompt to open a pop-up screen to build your multi-column sort.
3. Use the drop down lists to select the sort column(s) starting with the primary sort field, then the secondary sort field, etc.
4. For each field, select the direction of the sorting for that field.
5. When you are finished, click the **OK** button.

The list will now be sorted by the selected columns and the sort direction indicator will show you the direction and order of each sort field (▼₁, ▲₂, ▼₃, etc.).

Exclusions

Many of the PAR Vision screens include a Hit List which lets you focus on the top locations or items for a selected metric. For example, the locations that have the lowest compliance percentage, or the non-chargeable items which would generate the most revenue if they were made chargeable. Using the information on the hit list screens, you can make changes in the areas that will have the biggest impact on the overall operation.

When you are working with the hit list, there are times when you may want to exclude an item or location from the list even though it is one of the top entries in this particular metric. There are various reasons for these exclusions, including, under performing PAR Locations that are already being evaluated or "specialty" items that are not candidates for change. By excluding these items from the list, you can focus on locations and items that are not currently being evaluated and are candidates for change.

You can exclude entries from the Hit List using the **Exclusions** button.

Procedures

To *exclude* an entry from a hit list, follow the procedure outlined below:

- Click the **Exclusions** button.
- The system will display a check-box in front of each entry in the hit list.
- Click the box to mark the entries to be excluded.
- Click the **Submit Exclusions** button.
- The system will regenerate the hit list without these entries (i.e., it will pick up entries further down the list that were not originally included in the list).

To *remove the exclusion tag* from an entry follow the procedure outlined below:

- Click the **Exclusions** button.
- A new button will appear called **Recall Exclusions**.
- Click the **Recall Exclusions** button.
- The list of excluded entries will be displayed.
- Click the box to mark the entries to be put back into the hit list.
- Click the **Recall Exclusions** button.
- The system will regenerate the hit list including the recalled entries.

 When an entry is recalled from the exclusions list it may not appear in the hit list if the calculated metric does not place it at the top of the list. For example, a PAR Location that was being evaluated has improved its compliance so it is not longer one of the lowest percentages.

Export

 **Export** - The export button can be found on all PAR Vision screens that present data which is meaningful as an Excel spreadsheet. The data currently displayed in the report is formatted into a spreadsheet (including all filters that are currently applied and the sort sequence currently select).

The operating system will normally give you an option to **Save** or **Open** the file once the export is complete. To Open the file you must have Microsoft Excel installed on the workstation where you are currently viewing the PAR Vision report.

The data that is exported to the spreadsheet will not updated dynamically as changes are made to the system. For example, if you export the list of Open orders at 9:00 AM and a new Order is created at 9:15 AM that new order will not be included in the spreadsheet if you open the spreadsheet sometime in the future. Conversely, the reports displayed in PAR Vision always contain the most up-to-date information from the database. If you are making decision based on time-sensitive information, therefore, you are encouraged to use PAR Vision rather than any previously saved export files.