Sanitas Pharmacy Management System

Operations Manual

R/XIT1001-01

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CHAPTER 1

Sanitas Pharmacy Management System Overview

Sanitas Pharmacy Management System is a software suite used to fulfill prescription orders within an automated pharmacy environment. The software suite is comprised of several components that provide the ability to receive orders from a host system then fill, verify and pack those orders for delivery to patients.

Audience

This document is intended for all pharmacy technicians and pharmacists to perform the tasks related to fulfillment of prescriptions of the automated pharmacy.

Login

To begin, double-click an icon from the Sanitas Pharmacy Management System to launch the appropriate application. See the table below for a list of the available applications.

Notes:

- Passwords are ***not*** stored.
- You must have the appropriate permissions to access and use the Sanitas Pharmacy Management System applications. See *System Manager* for details on setting the permissions.

Icon	Application
	*Manual Fill* is intended for all pharmacy technicians to manually fulfill prescriptions delivered from a conveyance line.
	*Pharmacist Verification* is intended for pharmacists who need to verify prescriptions.
	*Manual Pack* is intended for all pharmacy technicians and other approved users to consolidate orders and print shipping labels used for prescription fulfillment.

Icon	Application
	Exceptions is intended for all pharmacists, technicians, and other approved users to handle and investigate issues with processing orders used for prescription fulfillment.
	Inventory Management is intended for all pharmacists, technicians, and other approved users to manage and review the availability of the drugs used for prescription fulfillment. **Note:** Most users will only have **view** (also known as **read only**) permissions. That is, they will not be able to add, modify, or delete any item to or from the database.
	System Manager is intended for approved users manage user accounts and roles, system and application configuration, and reporting in support of prescription fulfillment. **Contact your Sanitas system administrator for the URL to access System Manager.**
	Order Scheduler is intended for approved users to manage the efficient flow of totes throughout a pharmacy.

Once you have launched the appropriate application, the sign-in screen appears:

Enter your Sanitas **username** and **password** in the fields provided. Click **LOG IN**.

If the username and password are not entered correctly, then an **Invalid credentials** error message will appear.

To change your password, contact your password administrator.

System Requirements

Where applicable, review and verify that the following requirements have been met:

- Update user permissions, as needed, using System Manager. Contact your Sanitas system administrator to set the appropriate permissions for your profile.
- USB tethered scanner.
- RFID tag reader.
- Label printer.
- Paperwork printer.
- A screen resolution of 1280 x 1024, or higher.

CHAPTER 2

Manual Fill

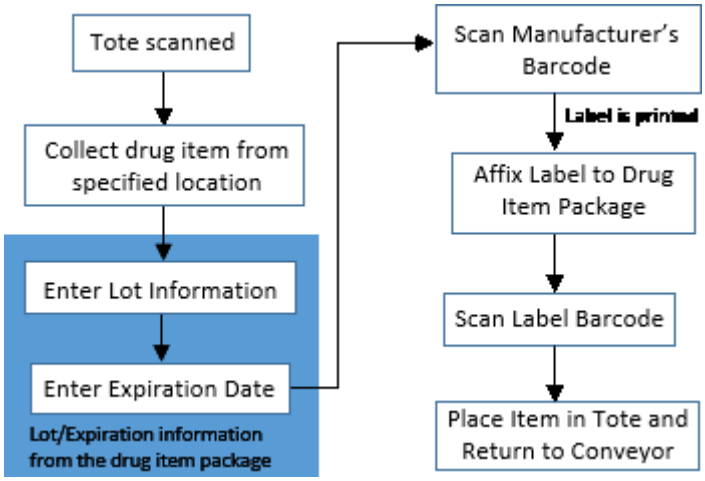
This chapter describes how to use Manual Fill to locate a drug, update expiration details, and print a label for the fulfillment of a prescription order. The following tasks are described:

- *Manual Fill Process Flow*
- *Manually Fill a Prescription*
- *Interrupt a Manual Fill*
- *Cannot Manually Fill an Item*

Manual Fill Process Flow

As part of the prescription fulfillment process, this Manual Fill chapter covers the **fill** step:

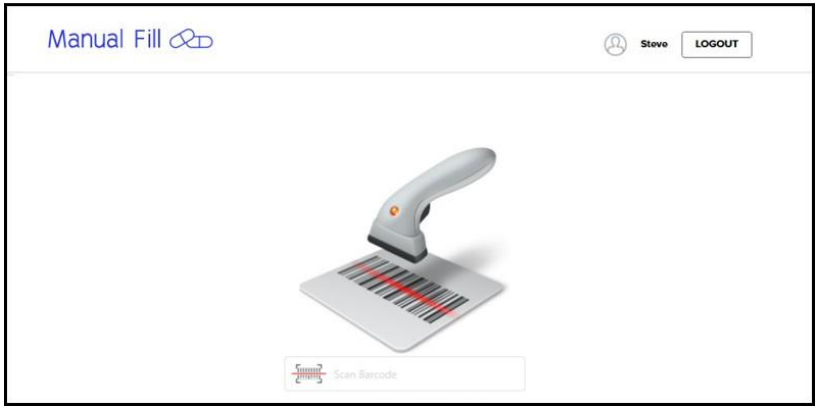
The following flow chart provides a general overview of the Manual Fill process:



Manually Fill a Prescription

After you have successfully logged into the Manual Fill application, follow the steps below to complete the manual fulfillment of a prescription order:

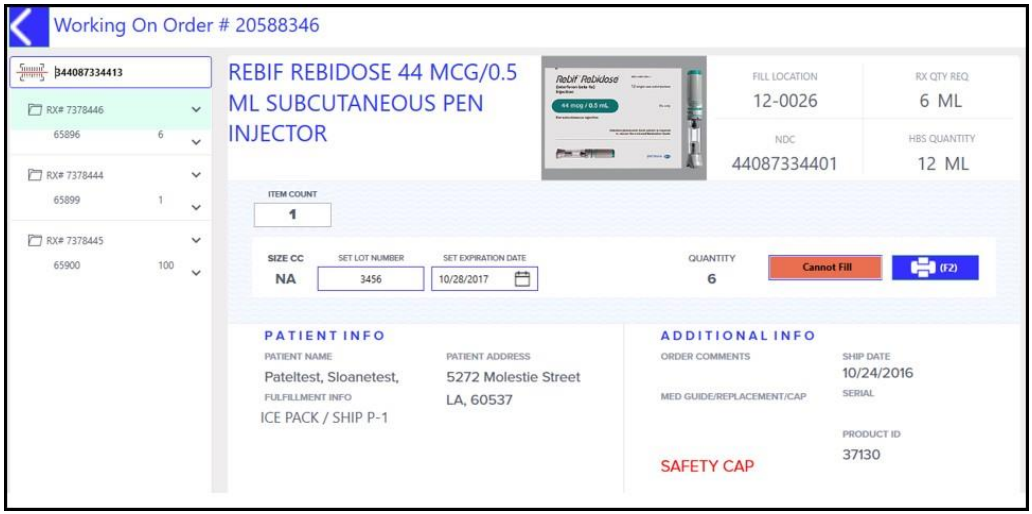
1. Scan the tote.
   - **Automatically:** The tote is automatically scanned by an RFID reader.
   - **Manually:** You can also manually enter the tote's barcode.



Note: If for some reason you interrupt the manual fill process, the last tote scanned will appear when you return. See *Interrupt a Manual Fill* for more details. Simply type the tote number into the scan field and press **Enter** to continue with the manual fill:

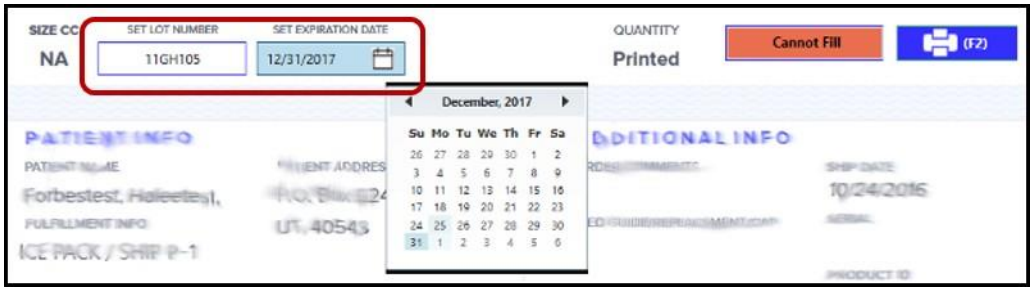
2. Collect the drug item.

   After the tote has been scanned, a list of prescriptions appears with the first item selected. Manual Fill will update to show the fill location in your area where the drug is located:



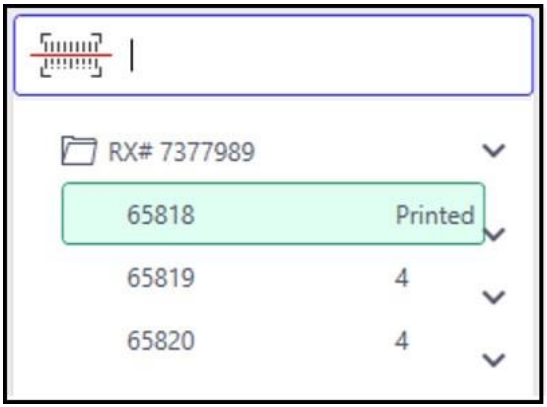
3. Enter lot and expiration information as it appears on the drug item:

- Enter the drug item's lot number in the **Set Lot Number** field.
- Enter the drug item's expiration date in the **Set Expiration Date** field. If you enter the expiration date manually, then use the `mm/dd/yyyy` format. Otherwise, click the calendar icon and select an expiration date.



Note: The expiration date recorded for a prescription must follow certain guidelines. The date ***must*** be greater than the current date at time of processing. If the drug is configured in inventory with a min and max days' settings greater than **0**, then the Manual Fill application must validate the dates entered. The dates that are recorded must fall within those settings requirements for the drug being processed.

4. After you have entered the lot and expiration date information, scan the manufacturer's barcode. A label will automatically print and the order tree will update to show the item's label as printed:



5. Apply the label to the item and scan the label barcode (not the manufacturer's barcode). Repeat for each item in the prescription.

Note: If you scan an invalid drug barcode, a dialog box will be displayed to warn you that the item is the incorrect drug. After you close the dialog box, you may be locked out (depending on your user settings). If you are locked out, a supervisor sign in will be required to unlock your access.

6. Return the drug item to the tote and repeat for each prescription in the order. Once the last item is filled:
   - **For automatic configurations:** The tote will automatically proceed to the next step in the prescription fulfillment process.
   - **For manual configurations:** Place the tote on the conveyor and proceed to the next step in the prescription fulfillment process.

   If this is the last/only prescription in the order, the Manual Fill application will return to either the Order Process screen or wait for a carrier (puck or tote) barcode to initiate the next order.

   If there are more items to process for the current order the Manual Fill application will return to the Items List screen.

Interrupt a Manual Fill

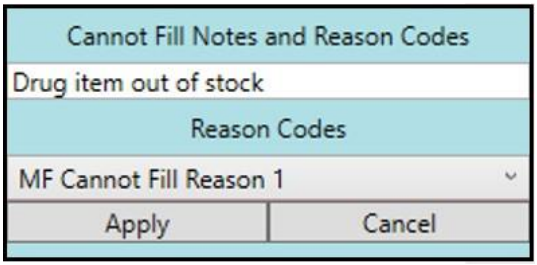
If for any reason you need to interrupt a Manual Fill order, click the Back button in the upper left-hand corner of the window:

To continue with the Manual Fill process, manually enter the tote number on the scan page and press **Enter**.

Cannot Manually Fill an Item

If the item cannot be manually filled, you can mark the item as *Cannot Fill*. This action will roll back the current item in process, remove the item from the list screen, and set the next item in the list as current. The order will then be routed to Exceptions. Follow the steps below if you cannot manually fill an item:

1. After the tote has been scanned, a list of prescriptions appears with the first item selected.
2. For the item that cannot be filled, click **Cannot Fill.**
3. In the pop-up window, you can enter a reason in the **Cannot Fill Notes** field and select a code from the **Reason Codes** drop-down list:



4. Click **Apply** to complete the Cannot Fill task.

   Note: After you click **Apply**, the item is removed from the order navigation and the tote will be routed to Exceptions.

CHAPTER 3

Pharmacist Verification

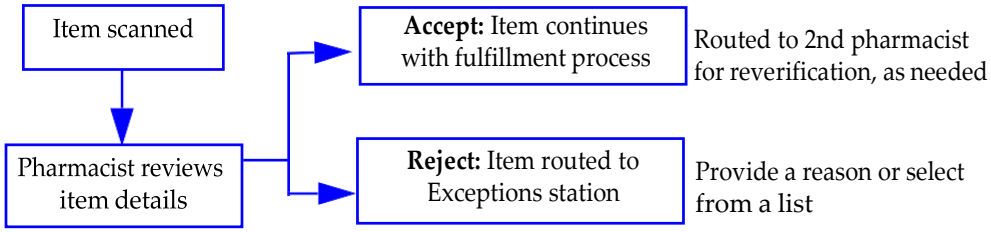
This chapter provides the necessary details for a pharmacist to verify a prescription. The following tasks are described:

- *Pharmacist Verification Process Flow*
- *First Pharmacist Verification Tasks*
- *Second Pharmacist Verification Tasks*
- *Review Scanned Drug Details Page*

Pharmacist Verification Process Flow

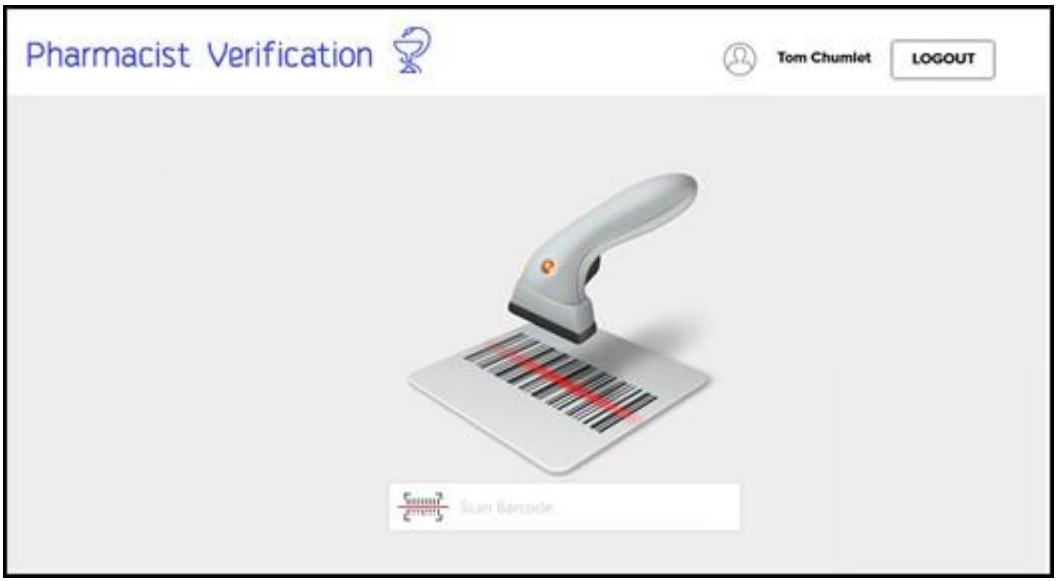
As part of the prescription fulfillment process, this chapter covers the **verify** step:

Once logged in to the Pharmacist Verification software, you will either accept an item or reject it. The following flow chart provides a general overview of the verification process:



First Pharmacist Verification Tasks

As the fulfilling process for a prescription continues, a pharmacist may be required to verify the details of the prescription. After you have successfully logged in, the following window appears:



Follow the steps below to accept or reject an item:

1. Perform a scan.

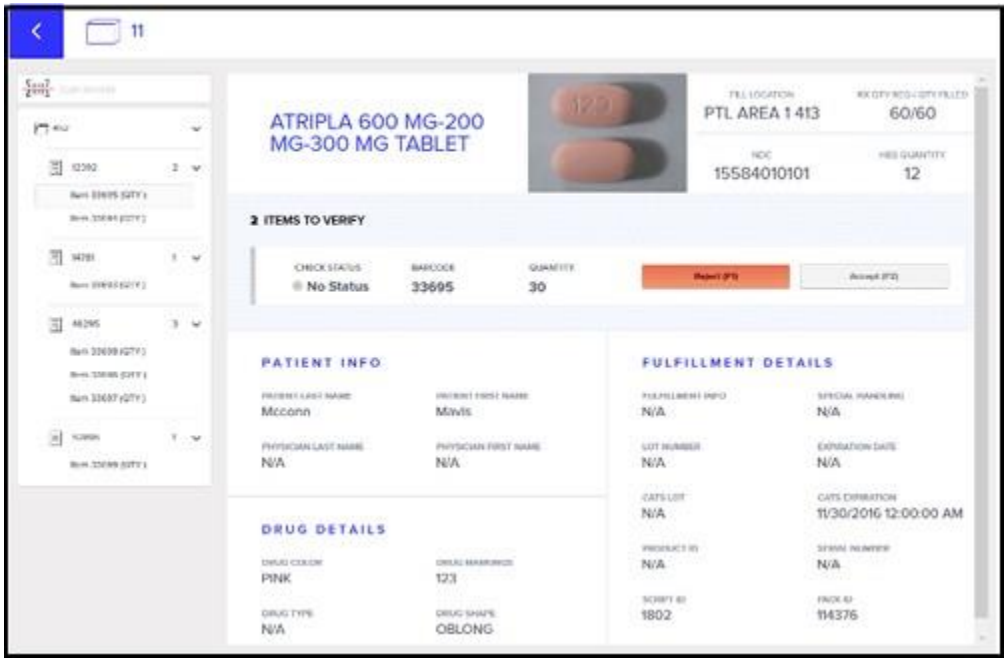
   Note: It is recommended that you remove the item/tote from the conveyor to perform this task.

- **Automatically:** Place the tote on the RFID reader to automatically scan the contents.
- **Manually:** Using your handheld scanner, scan a drug item's barcode to start the verification. You can also manually enter the drug item's barcode.

On this screen, no other action is required.

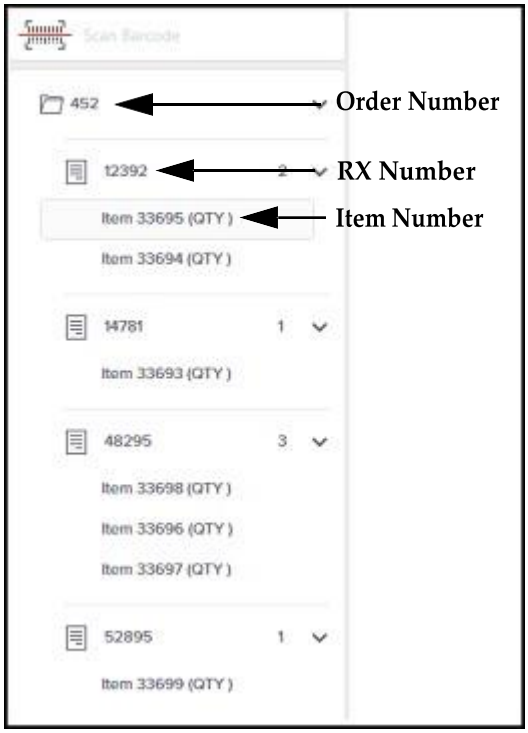
2. Review the drug details.

   After you have scanned the drug item, Pharmacist Verification will automatically update with the following window:



   See *Review Scanned Drug Details Page* for descriptions of the available details of this page.

3. Accept or reject the drug item. Each item of an order will be accepted or rejected. The order tree will show all items of an order that need to be verified:



Note: You can cancel/clear out of an order. Any items that have been verified (accepted or rejected) will remain verified. All items that have not been verified will remain the same. When the verification process is started again with the Pharmacist Verification software, the pharmacist will see which items have been verified and which have not.

From the Scanned Drug Details page's Items to Verify area, you will either **Accept** or **Reject** the item:

- **Accept:** If the details of the drug are acceptable, then scan the item's barcode again. Alternatively, you can press **F2** or click **Accept** to conclude the accept step.

  Note: If the item requires a second pharmacist to verify, see *Second Pharmacist Verification Tasks* for details.

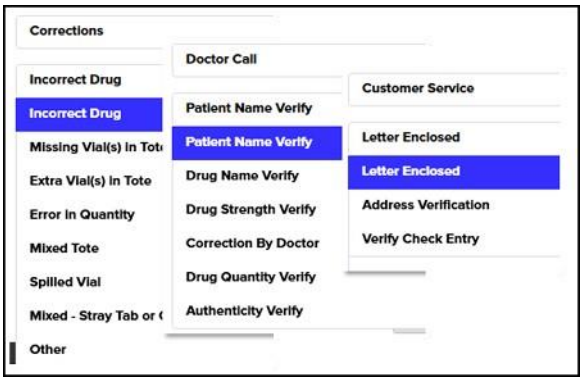
  The order tree will update to show items that have been verified (green checkmark) and items that now require a second pharmacist (blue checkmark) to complete the verification:

- **Reject:** If the details of the drug are not acceptable, then press **F1** or click **Reject** to select a rejection reason and send the carrier to Exceptions.

  A **What's the reason?** pop-up window appears, as shown below:

From the first drop-down menu, select a reason:

Next, select a specific reason from the second drop-down menu. The options will automatically update depending on your selection from the first drop-down menu:



(Optional) You can also enter an alternate reason in the Other reason(s) text field provided.

Click **Submit** to reject the item. The navigation tree will update to show the item as rejected (red exclamation point):

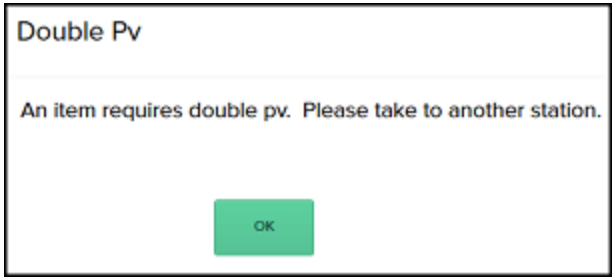
Note: If any items are rejected or restarted, the carrier will convey to the Exceptions station.

4. Repeat for each item in an order. Once all items have been verified, the order tree will update as shown below:

After verifying the items of an order, return the item/tote to the conveyor to continue with the fulfillment process.

Note: If any item requires a second pharmacist verification, the order tree will update to show which item requires the second verification:

Once you verify the last item of an order and if there are any items that require a second pharmacist to complete the verification, a pop-up window will appear:



See the steps in *Second Pharmacist Verification Tasks* to continue the verification process.

5. Log out of the Pharmacist Verification software.

   From the scan page, click **Log Out** (in the upper-right hand corner of the page) to log out of the Pharmacist Verification software:

Use System Manager to set an auto-logoff time. If a logoff occurs in the middle of a verification, any items that have been verified (accepted or rejected) will remain verified. All items that have not been verified will remain the same. When the verification process is started again with the Pharmacist Verification software, the pharmacist will see which items have been verified and which have not.

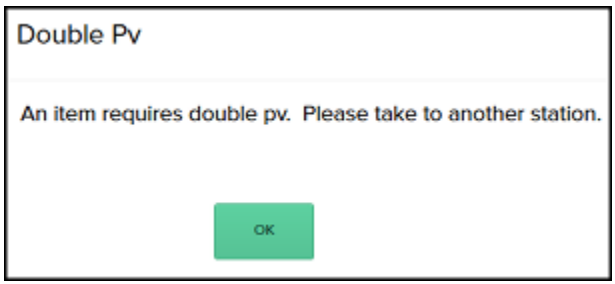
Second Pharmacist Verification Tasks

In some cases, an item will need to be verified by a second pharmacist. Follow the steps below to complete this second verification:

1. The items of an order are processed by the first pharmacist.
2. For any item that requires a second verification, the order tree will update to show which item requires the second verification:

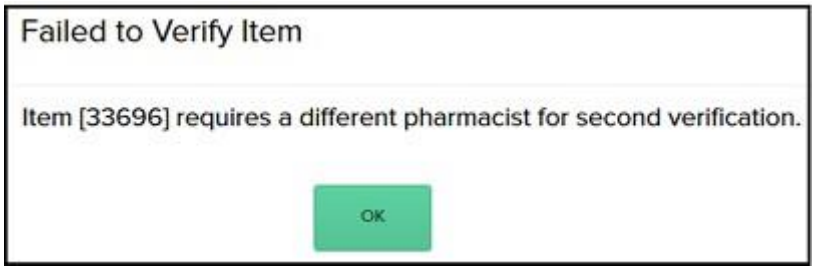
In the **Items to Verify** region, the status will update to show DV Required, indicating that a second pharmacist is required to complete the verification:

3. When the first pharmacist completes a verification and if there are any items that require a second pharmacist to complete the verification, a pop-up window will appear:



Click **OK**. The Pharmacist Verification application will return to the scan page for the first pharmacist to begin verifying the next order.

Note: The first pharmacist cannot verify items that require a second pharmacist to verify. If you attempt to verify such an item, the following pop-up window will appear:



Click **OK** to return to the original verification page.

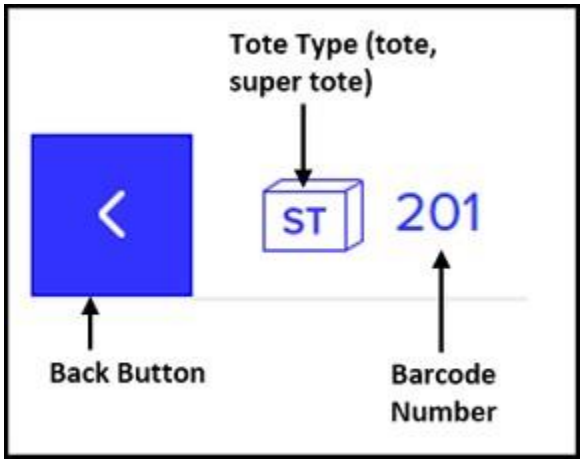
4. The first pharmacist then walks the order and carrier to another pharmacist station, and notifies them that it requires a second verification.
5. The second pharmacist processes the items of the order that need to be verified again. Once verified, the order tree will update to show the item as verified:

Note: If the carrier is put on the conveyor prior to the second verification, it will be diverted to the pharmacist Exceptions station.

Review Scanned Drug Details Page

The Scanned Drugs Details page contains the following informational areas:

- Navigation detail. This area shows the item number for the scanned tote (or super tote). For example:



Click the back button to return to the Scan Drug Item window.

- **Information or warning detail** appears below the Navigation detail area. This area provides a quick information or warning detail about an item selected in the order tree, for example:

This message will provide any information for the next steps in accepting or rejecting the item. Other information or warning details that may be displayed include:

- Invalid Order
- DEA Validation Required
- MedGuide Required

- Replacement
- Super Tote

- **Drug location detail.** This area shows the drug detail information:

The following information is provided:

- Drug name
- Fill Location
- Prescription quantity required and quantity filled
- NDC
- HBS quantity

- **General Information.** This area shows general information related to the patient (name and physician name):

and additional drug details:

The additional drug details includes the following information:

- Drug color
- Drug type
- Drug markings
- Drug shape

- **Fulfillment details.** This area provides the details once the item is filled:

The details provided include standard information (such as Special Handling Instructions, lot number, etc.) and any user-customized information (such as CATS lot, CATS expiration, etc.).

CHAPTER 4

Manual Pack

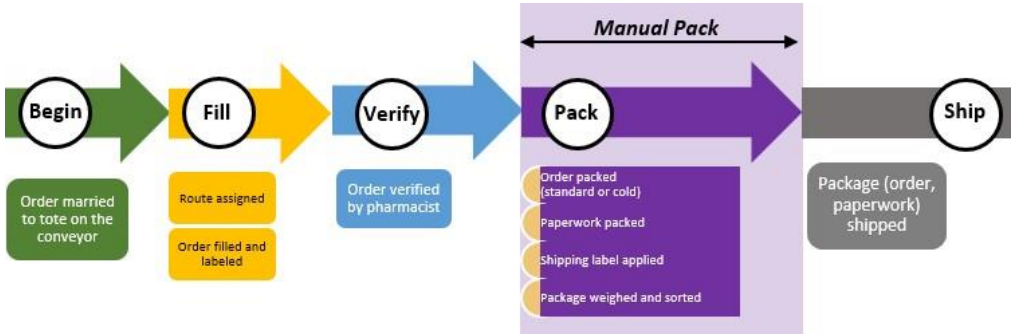
The Manual Pack application provides pharmacy technicians with functionality to consolidate orders, prescriptions (RX) and containers into a package that can then be shipped to a customer or location (for example, a customer's pharmacy) for pickup.

The shipping and handling data are printed either on a shipping bag directly or on a label that you then attach to a package.

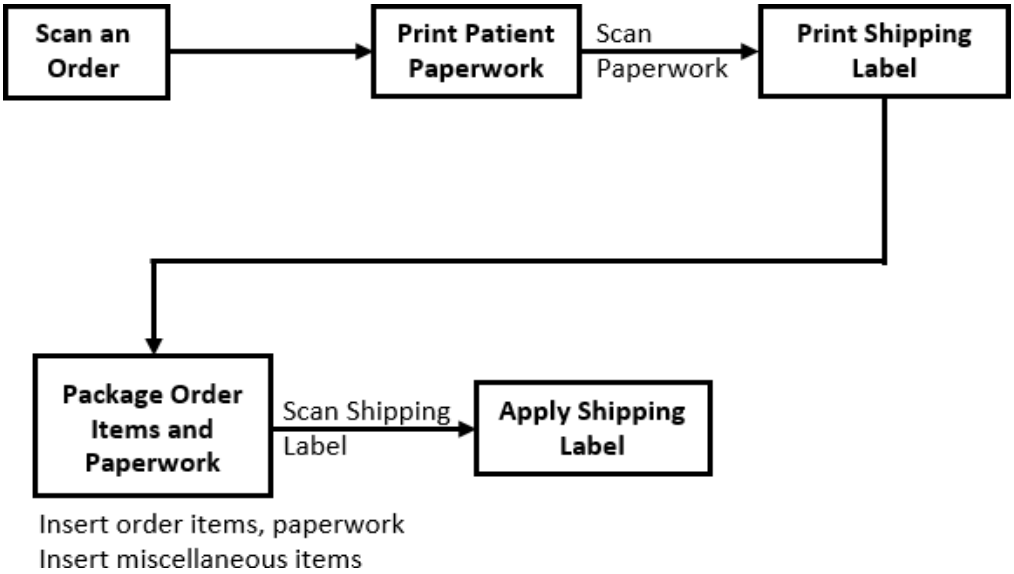
This chapter describes how to use Manual Pack to consolidate an order, prescription, or container and how to print a shipping label in support of prescription fulfillment. The following sections are provided:

Manual Pack Process Flow

As part of the prescription fulfillment process, this chapter covers the **pack** step:



The following flow chart provides a general overview of the Manual Pack process:

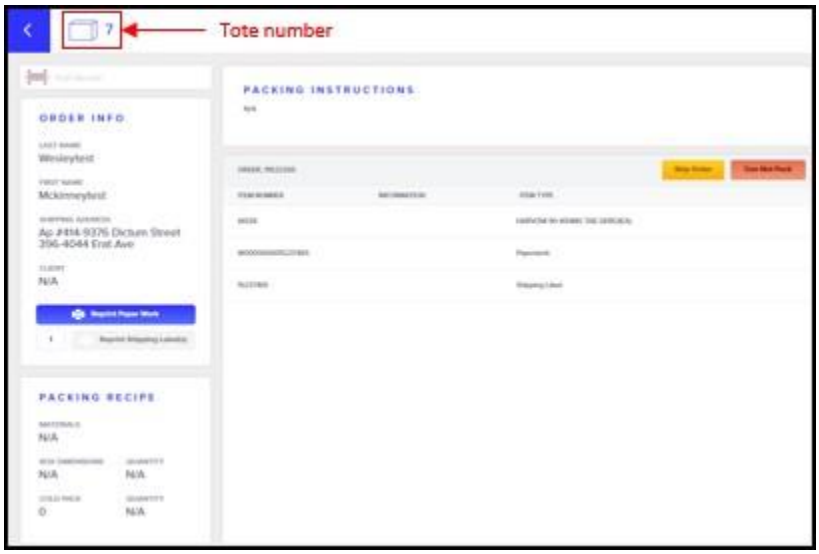


Processing an Order with Manual Pack

After you have successfully logged into the Manual Pack application, the scan screen appears:

Follow the steps below to complete the manual packing of a prescription order:

1. Scan an order. An order arrives at the station running the Manual Pack application in a container or carrier (puck or tote) with items filled and checked. Scan the barcode of a tote or item. If so configured, the carrier will automatically be scanned as it arrives. The pack screen for the order appears:



Repeat for each item of an order. Manual Pack will update the order status to **Pack in Process** when the order packing process has been initiated.

Notes:

- If a container, puck or tote is determined not to be eligible for packing, a user message dialog box will display. After you close the message, the Manual Pack application returns to the main user screen.
- If an item is determined not to be part of an order or tote, a user message dialog box is displayed. Once you close the message, you will be locked out of the Manual Pack application. Depending on your user settings, you will be able to log back into Manual Pack or you will require a supervisor log in for unlock.

2. Print and scan the patient paperwork. If configured, the patient paperwork will print after the order is scanned. Scan the paperwork's barcode. The Manual Pack page will update the item with a green checkmark to show that it has been scanned.
3. Print the shipping label. After the patient paperwork has been printed and scanned, the shipping label will automatically be printed.

   Notes:

   - If needed, you can select the number of shipping labels to be printed. By default, the number of shipping labels is **1**. If you only require 1 shipping label, then the final shipping label is

printed. If you require more than one shipping label, then the barcoded license plate labels are printed.

- You must have reprint permissions to reprint a label. If you do not have permissions, contact your supervisor or System Manager administrator.

4. Package order items and paperwork. Insert the patient paperwork and order items into a shipping package and apply the shipping label. If applicable, any special packing instructions will appear in the Packing Instructions region. Scan the shipping label of the order to mark it as **packed** with Manual Pack.

Clear/Skip an Order

During any part of the manual pack process, you can clear/skip an order in process. Manual Pack will automatically initiate the next order or wait for the next tote/puck/item scan. To clear/skip an order:

- Click the back button in the upper left-hand corner of the Manual Pack window.

  OR

- Click **Skip Order**.

Note: You must have the appropriate permissions to clear or skip an order. If you do not have these permissions, contact your supervisor or System Manager administrator.

A confirmation pop-up window will appear:

Click **Yes** to confirm and return to the start/scan window.

Note: In some instances, an order may become invalid during the packing process. If an order is declared to be invalid at any point during the packing process, the packing process ***must be canceled***.

Cannot Pack

To mark an order as not packable:

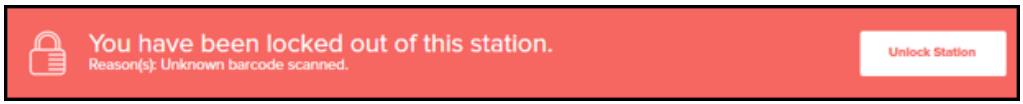
1. Click **Cannot Pack**.
2. In the **What's the Reason** pop-up window, select a reason from the drop-down menu list:

   You can also enter a reason in the available **Other reason(s)** field.

3. Click **Submit**. Manual Pack will cancel the process and return to the scan/start window.

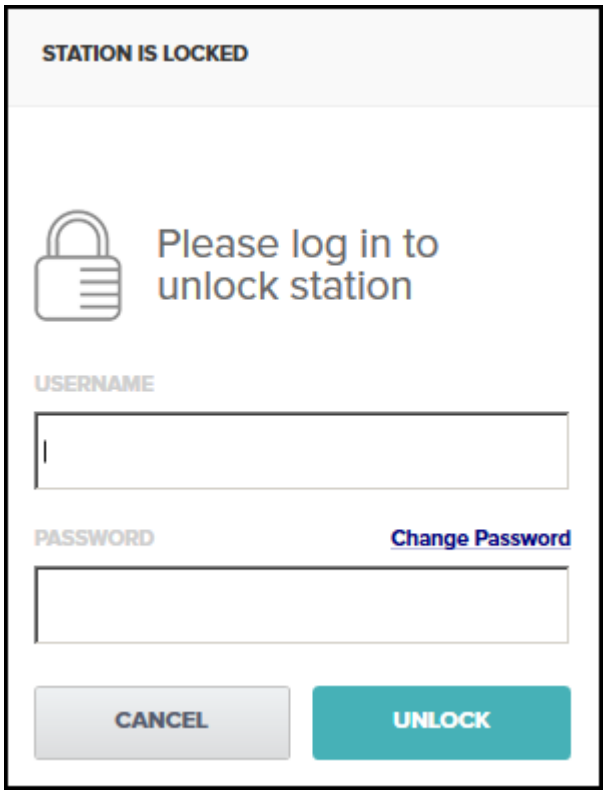
Unlock Screen

If an invalid barcode is scanned, Manual Pack will lock the station. A warning message will appear at the top of the screen:



To unlock the station:

1. Click **Unlock Station**.
2. A login screen will appear for a supervisor to login:



Enter the supervisor username and password. Click **Unlock**.

3. In the **What's the Reason** pop-up window, select a reason from the drop-down menu list:

You can also enter a reason in the available **Other reason(s)** field.

4. Click **Submit**. Manual Pack unlock the station and return to the point at which the station was locked.

CHAPTER 5

Exceptions

The Exceptions software provides users with the functionality to handle and investigate issues that can occur with processing orders or prescriptions in an automated pharmacy environment. This chapter provides an overview of Exceptions and summarizes the features. The following topics are provided:

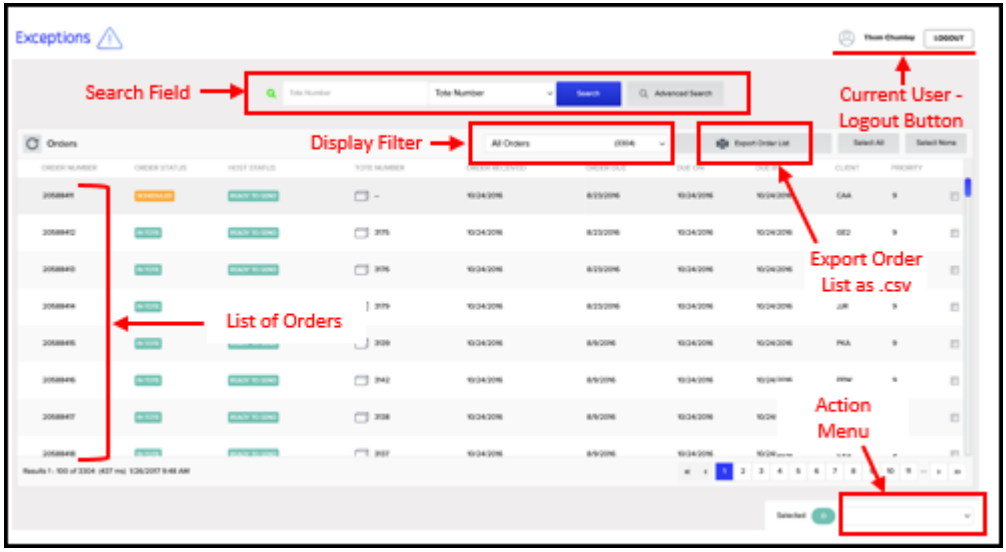
- *Search and Browse for Order Details*
- *Exceptions Order Details and Overview*
- *Working with Exceptions*

Search and Browse for Order Details

This section describes how to use Exceptions to search and browse details of an order or prescription.

Once you have successfully logged into Exceptions, a complete list of orders displays by default as shown below. You can view/browse the list of all orders by default. From this page, you can:

- *Search for Exceptions Details*
- *Filter Orders Displayed*
- *Perform an Action on an Order*
- *Export the Orders List as a .csv File*
- *Log Out of the Exceptions Application*



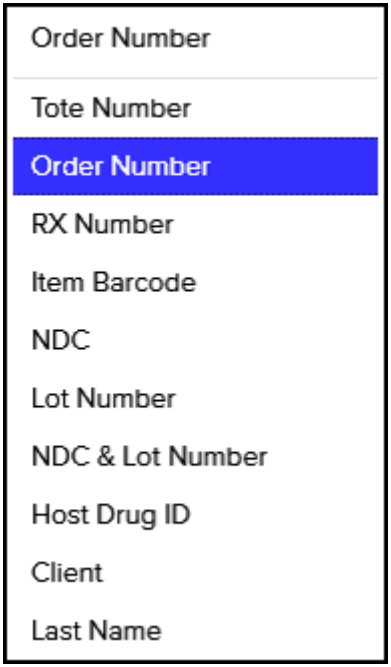
Search for Exceptions Details

You can search for details about a specific order:

1. Enter a search term in the search field.

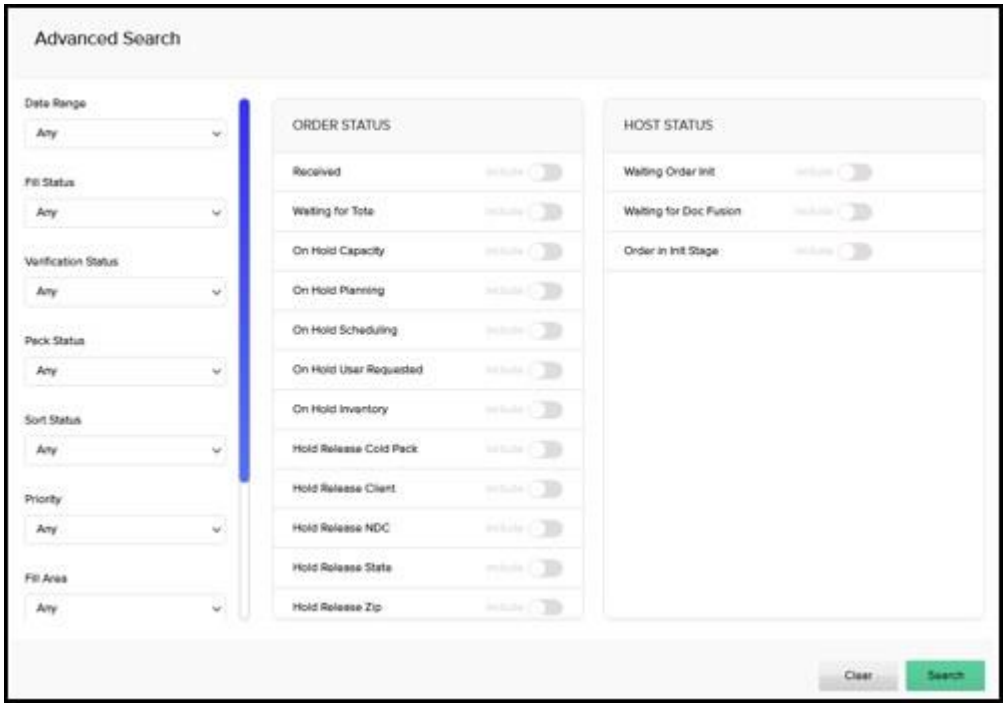
   Note: if you leave the search field blank and click **Search**, then you will be returned with zero results. To return to the default list, press the **Escape** key (ESC).

2. Select an area from the search drop-down menu as shown from the image below:



3. Click the **Search** button.

To limit the results even further, click the **Advanced Search** button for a variety of search options as shown below:



Click the **Include** toggle switch to include the filter you want to add. Click **Search** to perform the advanced search or click **Clear** to remove the advanced search settings.

Filter Orders Displayed

You can limit the number of orders displayed by selecting a filter from the display filter drop-down menu. By default, **All Orders** is selected. Click the menu and select from the available filters as shown below:

All Orders	(3304)
All Orders	(3304)
User-Requested Hold	(0)
Priority Orders	(4)
Invalid Orders	(1)
On-Hold Orders	(0)
Orders in Totes	(2609)
Orders in Supertotes	(0)
Orders Waiting for Totes	(6)
Exceptions Orders	(0)

Perform an Action on an Order

From this page, you can perform an action on a single order or multiple orders:

1. Select an order or orders on which you want to perform an action. Click the select box for each order you want to affect.
2. Depending on the action you select, a pop-up window will appear prompting you for a reason for the action. Select a reason and click OK to initiate the action.
3. The list of orders will update to show the change.

See *Working with Exceptions* for details on the actions you can take on an order.

Export the Orders List as a .csv File

One you have a list of orders, you can export the list into a comma-delimited .csv format:

1. Click **Export Order List**.
2. You may need to select an application (such as Notepad). From this application, enter a name and location for where you want the .csv file to appear.

3. Use your preferred spreadsheet application (for example, Microsoft Excel) to open the .csv file. If you import the file, then select **Comma Delimited** as the format.

Log Out of the Exceptions Application

To log out of the Exceptions application, click **Logout** in the upper right-hand corner of the window.

Exceptions Order Details and Overview

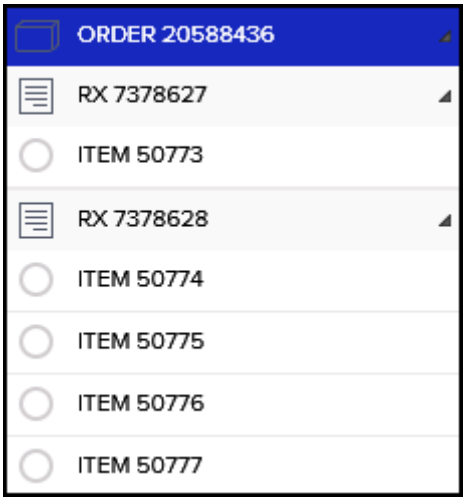
This section describes the details of an exception order, including the RX, item, and lot details. The following sections are provided:

- *Order Navigation Tree Details*
- *Exceptions Order Page Details*
- *Prescription (RX) Summary Details Page*
- *Item Order Page Details*
- *Return to Stock (RTS) Item Page Details*
- *Lot Order Page Details*

To display the details of an order, scan the tote's bar code or RFID tag (recommended) or search for a specific record as described in *Search and Browse for Order Details*.

Order Navigation Tree Details

From the order navigation tree, you can drill down to view additional details about the prescription (RX) and item. The navigation tree appears in the upper-left of the displayed Order page:



Because an order can be composed of one or many prescriptions, each prescription number is listed here. Click an RX item under the order navigation tree to expand the tree to display the items included in the RX.

Each item in the list may have an icon showing the status of the item. The table below defines the icons you may see:

	Icon	Definition
Item Status Icons		Item returned to stock (RTS)
		Item PV2 verified
		Second verification required (PV2)
		Item PV2 rejected
		Item filled
		Item not filled
Item Type Icons	32°	Item requires cold pack
	72°	Ambient room
	99°	Item requires heat protection
		Bulk pack

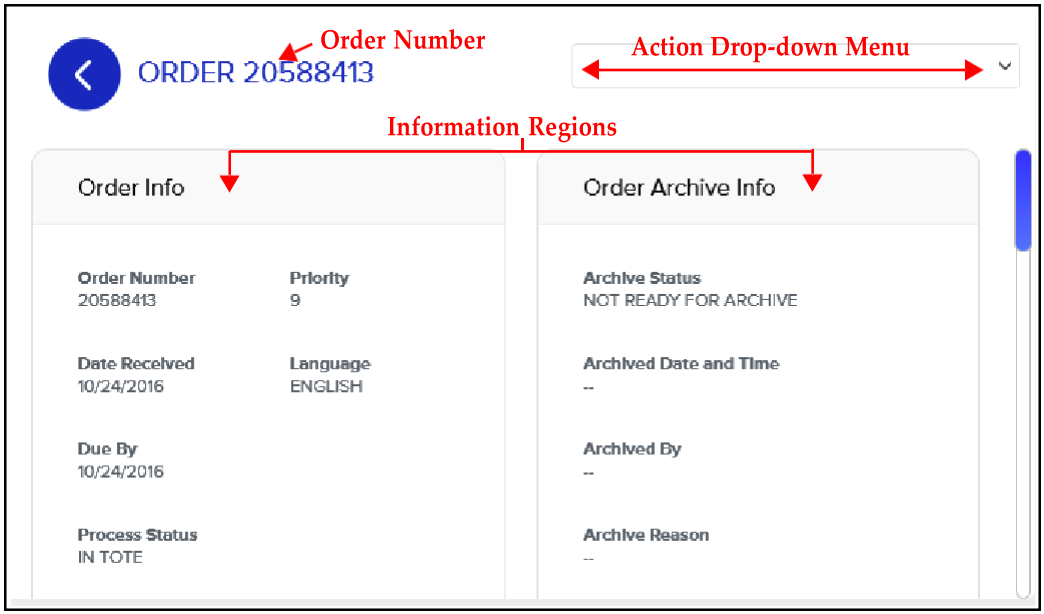
	Icon	Definition
Order Icons		Order is a super tote
		Order is a tote
RX Iconts		Prescription (RX)

Each prescription is composed of an **item or multiple items**, which is how the prescription is delivered (for example, vial, syringe, capsule). The order navigation tree includes icons that give you a quick-glance overview of the status of each item. See *Item Order Page Details* for information about the prescription.

Each item can have one or more lots associated with it. The **lot** is the physical location of the item. See *Lot Order Page Details* for information about the lot associated with an item.

Exceptions Order Page Details

After you have selected an order (from scanning a bar code or RFID tag or from searching as described in *Search and Browse for Order Details*), the Order details window appears:



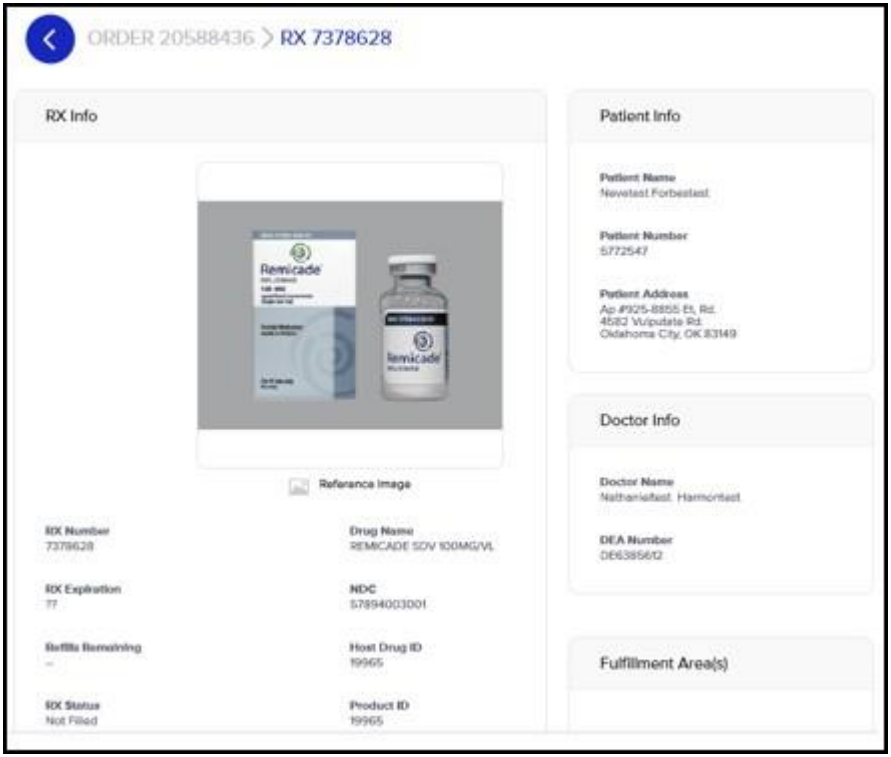
The following table describes the information regions provided:

Region	Description
Order Info	This area shows the details about the order. Details include the order number, the date the order was received, the due date of the order, and the processing status. As the exceptions order progresses, the processing status will update for each stage. See *Working with Exceptions* for the various statuses that can appear for this detail area.
Order Archive Info	An exceptions order can be completed or canceled for a number of reasons. This area provides the archive details. Archiving details include the status, date and time the order was archived, the name of the technician who archived the order, and a reason for the archive. See *Working with Exceptions* for information about the archive status.
Site/Store Info	This area provides the name of the client and the location of the client

Region	Description
Tote Info	This area provides details about the tote, which contains or previously contained the order. Details include the tote ID number, the marriage location, the marriage date and time, the last reported location, and the current destination.
Order Fulfillment Instructions	This area provides the details for any special shipping instructions.
Order History	This area lists the actions that have been applied for the current exception order. Sorted by the date and time, details include the action taken, the technician who performed it, and the station/location where the action occurred. By default, the order history is shown in this area.
Tote History	click **Tote History** for details about the actions applied for the tote of an exceptions order. Sorted by date and time, details include the actions taken, the technician who performed it, and the station/location where the action occurred.
Action Menu	From this menu, you can perform various tasks to continue with the processing of the order. To begin, select the action menu in the upper-right corner of the Orders page. See *Working with Exceptions* for details of each action item you can take.

Prescription (RX) Summary Details Page

From the order navigation tree, select an RX item to display details about the prescription. The following RX details window appears:



The following areas are included on the RX Details page:

- **RX Info** - this area provides a summary of the information about the prescription, including a reference image of the prescription, when available. The following information is provided:
  - RX Number
  - Refill Info – the number of refills remaining.
  - Sig
  - RX Status
  - Drug Name
  - NDC
  - Quantity Required
  - Quantity Filled

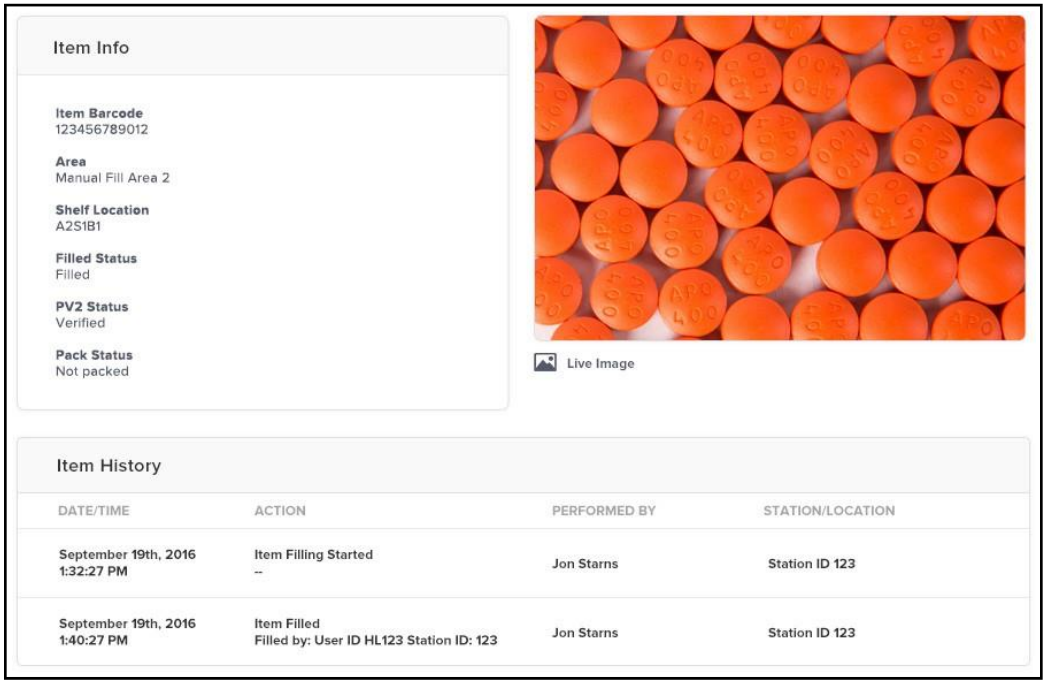
- **Patient Info** – this area provides details about the patient to whom the prescription is for. Details include:
  - Patient Name
  - Patient Number
  - Patient Address
- **Doctor Info** – this area provides detail about the doctor who wrote the prescription. Details include:
  - Doctor Name
  - DEA Number
- **Fulfillment Areas**
- **RX History** - shows the details about the actions applied to the prescription of an exceptions order.

  Sorted by date and time, details include the actions taken, the technician who performed it, and the station/location where the action occurred. The values of the action include:
  - Scheduled
  - Released
  - Married
  - Filled
  - Pharmacist Verified
  - Sorted
  - Packed
  - Canceled
  - Retried
  - Split
- **Action Menu** – From this menu, you can perform various tasks to continue with the processing of the prescription (RX). Click the action menu in the upper-right corner of the RX details page and select one of the following items:
  - **Print RX Info**
  - **Restart RX**

  See *Working with Exceptions* for details of each action item you can take.

Item Order Page Details

From the order navigation tree, click an RX item to expand and display the details about the prescription. Then select an item from the expanded list to display details about the item. Details about the item are displayed, including an image of the item when available:



The following areas are included on the RX Details page:

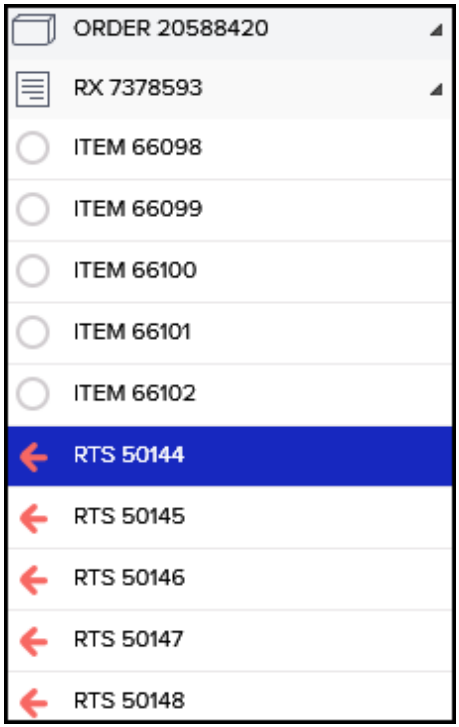
- **Item Info** shows details about the item, including:
  - Barcode
  - Container Type
  - Area
  - Filled Status
  - Shelf
  - PV2 Status
  - Pack Status

- **Item History** - Sorted by date and time, details include the actions taken, the technician who performed it, and the station/location where the action occurred.
- **Action Menu** – From this menu, you can perform various tasks to continue with the processing of the item. Click the action menu in the upper-right corner of the Item details page and select one of the following items:
  - **Print Item Info**
  - **Print Item Label**

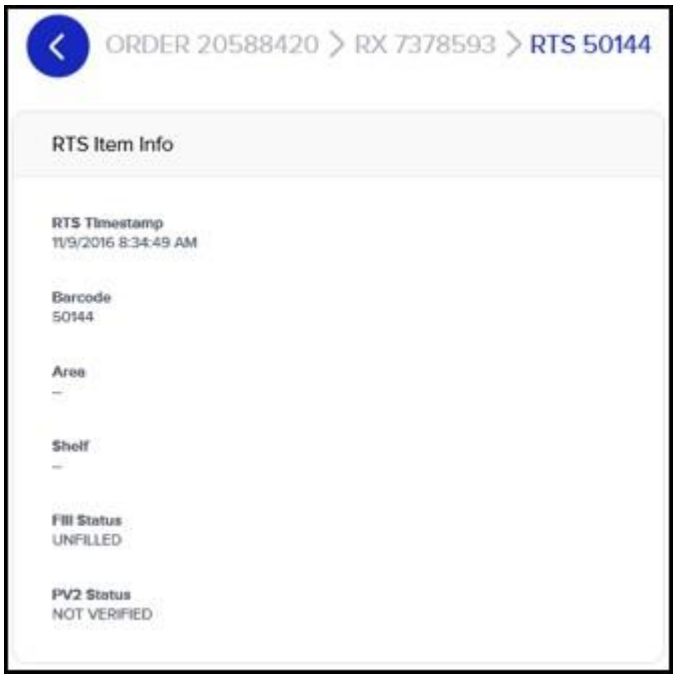
  See *Working with Exceptions* for details of each action item you can take.

Return to Stock (RTS) Item Page Details

An item that has been labeled as **Return to Stock**, or **RTS**, will show the RTS icon in the Order navigation tree as shown below:



Click an RTS item to display show the RTS Item details page:



Details include:

- RTS Timestamp
- Barcode
- Area
- Shelf
- Fill Status
- PV2 Status

Action Menu – From this menu, you can perform various tasks to continue with the processing of the RTS item. Click the action menu in the upper-right corner of the Item details page and select one of the following items:

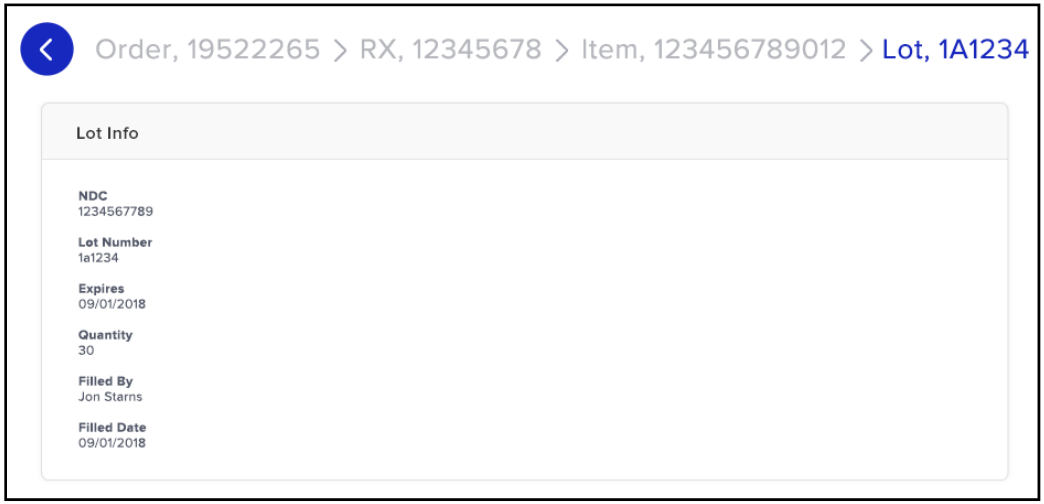
- **Print RTS Item Info**

- **Print RTS Item Label**

See *Working with Exceptions* for details of each action item you can take.

Lot Order Page Details

From the order navigation tree, select an RX item to expand and display the items associated with the prescription. Then select one of the items to expand and display all of the lots associated with the item. Click a lot to display details about the lot:



Details of the lot include:

- **NDC** – the National Drug Code (NDC) of the drug.
- **Lot Number** – the number of the lot.
- **Expires** – the date the drug associated with the lot reaches expiration.
- **Quantity** – the number of items of a drug. For example, if the drug is available as a 30-count pill, the number available is shown here.
- **Filled by** – the prescription technician who fills this part of the order.
- **Filled Date** – the date that the prescription technician fills this part of the order.

Working with Exceptions

This section describes the tasks that you can perform with the Exceptions application. You will be performing a task on an order, RX, item, or RTS item:

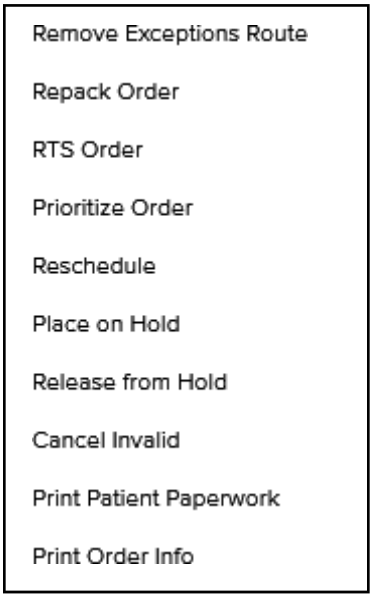
- *Order Actions*
- *Item Actions*
- *RTS Item Actions*

Order Actions

To perform an action for an order:

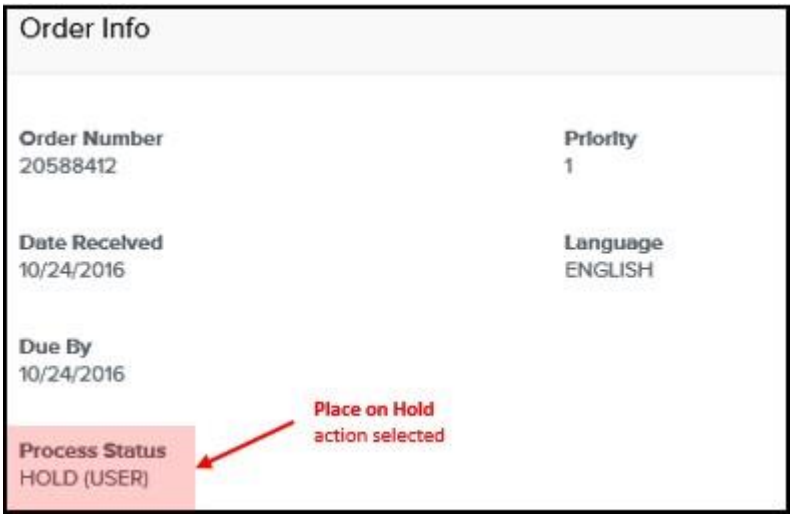
1. Select an order:
   - Display an order record. Double click an order from the list of orders after you have successfully logged in.
   - Select one or more orders from the list of orders as described in
2. Click the **Actions** menu:
   - From the Orders details page, the action menu is in the upper-right corner of the details page.
   - From the default list of orders page, the action menu is in the lower-right corner of the list.

   The available actions you can take for the order will display:



3. Select an action from the menu.
4. Depending on the selected action, a pop-up window will appear prompting you to provide a reason for the action. For example, if you select the Reschedule Order(s) action, a pop-up window will appear for you to select a reason.

   Select a reason and click **Submit**.
5. Once you click **Submit** or **OK** to verify an action, the Order info record will update to reflect the change. For example, if you select the Place on Hold action, the Process Status value in the Order Info area of the Orders details page will update as shown below:



This same update is made to the default orders list as shown below:

The following table describes the available actions you can take for an order:

Action	Description
Remove Exceptions Route	Indicates that the order's tote no longer requires conveyance to the Exceptions station.
Repack Order	This action allows you to set an order for repack eligibility. The order will be set to an unpacked status and the order must be passed through the packing process again in order to have a packed status. All original packing events and records will be kept along with user ID of original packer(s). A new set of packing and events will be recorded for successive packing processes.
RTS Order	This function generates a message dialog box indicating if you would like to print return-to-stock labels for the items in the order. Select **Yes** to generate a return to stock label for each item in the order. This function applies either to an active order or to an archived order.
Prioritize Order	Prioritizing orders allows you to manually increase or decrease the priority level for processing within the Sanitas Pharmacy Management System. The priority level will take effect on the order of preference for orders in: • Order Scheduling • TCA/UofU Devices • Tote/Puck marry Queues • Manual Fill
Reschedule	With the Reschedule action, you can start an entire order over from the beginning. When an order is rescheduled, it will be evaluated and processed again by the Order Scheduling Service. **Only active orders can be rescheduled, while orders that have been exported cannot be rescheduled.** The eligibility of an order should be validated before allowing the order to be rescheduled. An order will be considered ineligible for reschedule if any of the following apply: • Order is exported • Order is archived • Order is canceled
Place on Hold	You can update the status of orders that are in currently in process be placed on hold. Examples of orders in process are: • Items currently dispensing in TCA devices • Items in a sortation device • Items in a tote

Action	Description
Release from Hold	You can remove orders from a user-requested hold status. Once an order has had its user hold status removed, an order can resume the scheduling filling, checking, or packing process from its last point of processing.
Cancel Invalid	This function allows you to cancel an entire order, and if there is a two-way interface, communicate the cancel status back to the host system. This function is only available if an order is marked as **invalid**.
Print Patient Paperwork	Select this action to print the patient paperwork for the order.
Print Order Info	Prints the Order details page.

RX Actions

There are two actions available for prescriptions of an order:

- **Print RX Info**. Prints the RX Info details page.
- **Restart RX**. This function resets an entire RX's status back to an unfilled state. Restart RX only applies to items RX's that are manually filled in unit of use

Item Actions

There are two actions available for the item of a prescription (RX) within an order:

- **Print Item Info**. Prints the Item Info details page.
- **Print Item Label**. Select this action to print the label for the item. A unique barcode is included on the label. This action is captured and recorded in the database.

RTS Item Actions

There are two actions available for the item tagged as being **Return to Stock** or **RTS**:

- **Print RTS Item Info**. Prints the RTS Item Info details page.
- **Print RTS Item Label**. Select this action to print the label for the RTS Item. A unique barcode is included on the label. This action is captured and recorded in the database.

CHAPTER 6

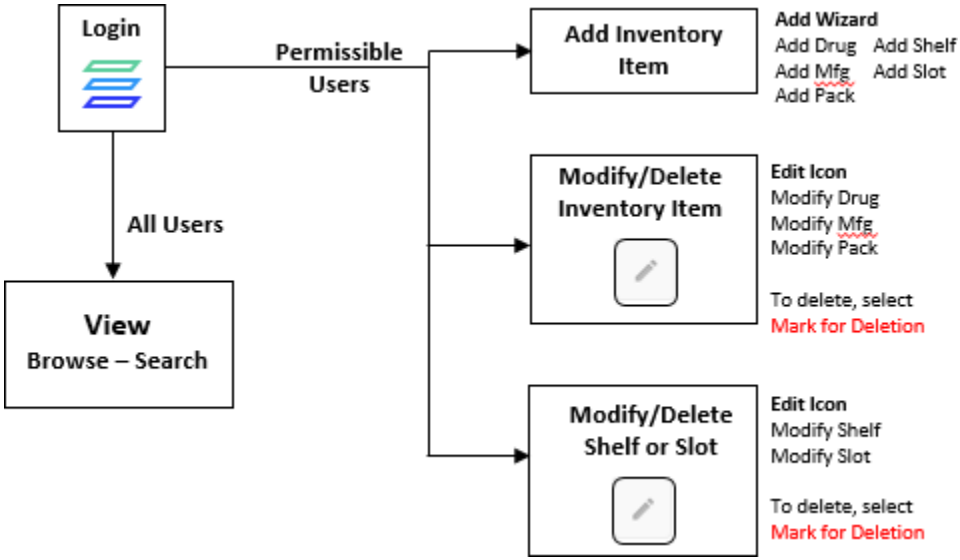
Inventory Management

The Inventory Management application provides users the ability to locate and add, modify, or delete inventory items that are used for processing orders or prescriptions in an automated pharmacy environment. This document provides details for managing the inventory and shelves in support of prescription fulfillment.

This chapter includes the following topics:

Inventory Management Process Flow

Once logged in to the Inventory Management software, you can review the availability of a drug, add or modify its attributes, or delete it from the database. The following flow chart provides a general overview of the process:



Search Inventory With Inventory Management

This section describes how to view (browse and search) details using the Inventory Management software. After you have successfully logged in, click:

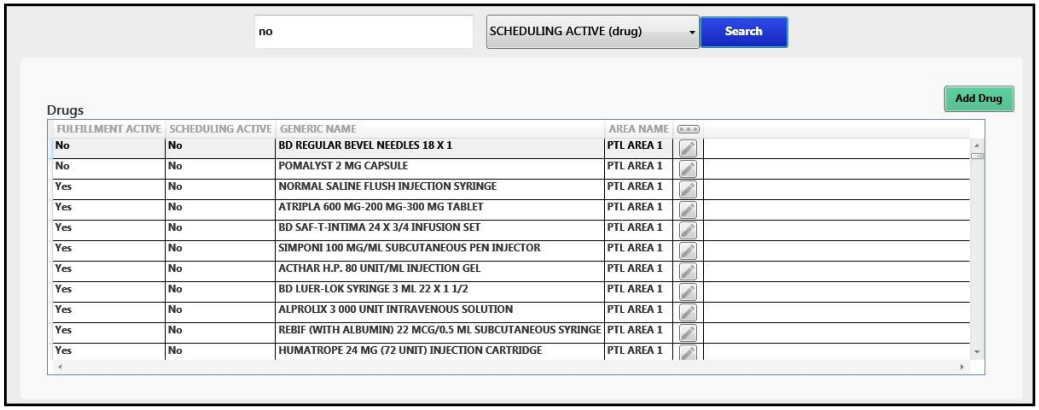
- *Manage Inventory* to search for drug, manufacturer, location, etc., details.
- *Manage Shelves* to search for specific shelves, areas, etc.

Note: Refer to the Formulary Report in *System Manager*.

Manage Inventory

On the Manage Inventory page, the default search is for the **generic name** of the drug (for example, aspirin). Enter a generic drug name and click **Search**. You can also search for specific details (such as brand name, manufacturer, scheduling, etc.). From the drop-down list, select a specific detail for which you want to find and click **Search**.

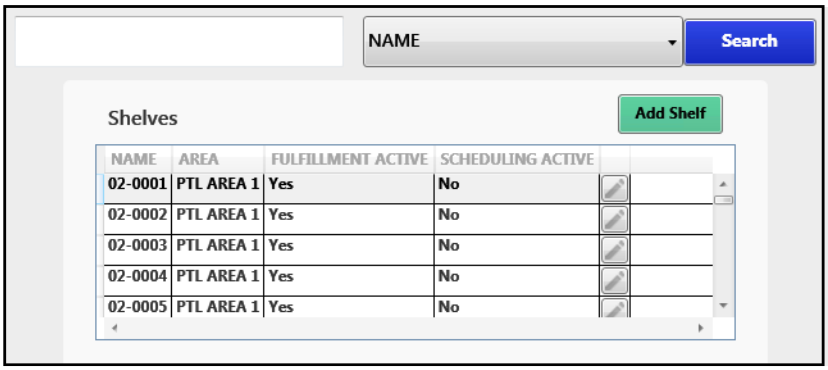
For example, for a list of drugs that are not included for order scheduling, search for **no**, select **Scheduling Active** from the drop-down list, and click **Search** as shown below:



You can update the results to view additional columns. Click the edit icon in the last column to display a list of available column. Hold the Control key and click the titles of the columns you want to appear.

Manage Shelves

To view details about a shelf, click **Manage Shelves** in the title bar. The following page displays:



Using Inventory Management to Add, Modify, or Delete

This chapter describes how to add, modify, or delete an inventory item, shelf, or slot from the Inventory Management database.

Note: You must have the appropriate permissions and approvals to perform the tasks outlined in this section. If you do not have them, then you will not be able to make any changes to the Inventory Management database.

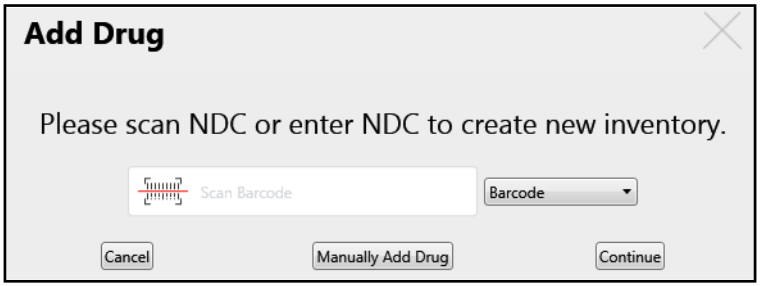
The following sections are provided:

- *Add a New Drug Using the Add Drug Wizard*
- *Add Drug Manually*
- *Add a Shelf*
- *Modify Inventory Item, Shelf, or Slot Details*
- *Delete an Inventory Item, Shelf, or Slot*

Add a New Drug Using the Add Drug Wizard

Follow the steps below to use the Add Drug wizard to add an entry to the Inventory Management database:

1. After you have successfully logged into Inventory Management, the Manage Inventory page appears by default. If this page does not appear, click **Manage Inventory** at the top of the page.
2. Click **Add Drug** to launch the Add Inventory Item wizard:



Scan the drug's bar code or enter it manually to prepopulate details of the drug, manufacturer, and pack.

Note: If you do not have the bar code or NDC, see *Add Drug Manually* to manually add the drug.

3. Add a drug.
   a. On the Add Drug page, review the drug details of the fields prepopulated from the scanned bar code. Add any additional information, as needed.

      Note: If the drug already exists, then a pop-up window will appear to indicate that it exists. The page will reload with the associated drug in the search results.
   b. By default the drug options are not set. Click the appropriate option to enable the feature:

Option Name	Description
Active	Activate slotting to schedule by the order scheduling service. When enabled, order scheduling will release orders for this slot or shelf.
Bleedout	Select this option to enable bleedout, which allows you to use inventory from a shelf or slot that is being moved.
Double Verify	Identifies a drug that will require a second pharmacist (PV2) to verify.
Drug Control Level	
FDA Generic Name	
Generic Name3	
Marked for Deletion	
Max Days	
Min Days	
Non Drug	Identifies the item as a non drug (for example, a bandage, syringe, etc.).

   After you have reviewed and verified the drug details, including selecting the appropriate switches, click **Add Drug**. This action will create the drug entry in the Inventory Manager database. The next step in the Add Drug Wizard is to add a manufacturer.
4. Add a manufacturer. If you scanned the bar code of the drug, then most of the manufacturer details will be prepopulated. If you clicked **Manually Add Drug**, then you will need to enter the manufacturer details in each field.
   a. On the Add Manufacturer page, review the manufacturer details of the fields prepopulated from the scanned bar code. Add any additional information, as needed.

      In addition to the fields, there are two additional switches to set (default is “off”):

Switch Name	Description
Scheduling Active	Enable (checked) or disabled (unchecked) slotting to schedule by the order scheduling service. When active, order scheduling will release orders for this slot or shelf.
Fulfillment Active (Bleedout)	Enable (checked) or disabled (unchecked) slotting for purposes of filling. When active, orders are available to be filled from this slot or shelf.

b. After you have reviewed and verified the manufacturer details, including selecting the appropriate switches, click **Add MFG**. This action will create the manufacturer entry in the Inventory Manager database for the drug being created. The next step in the Add Drug Wizard is to add a package.

5. Add a package. If you scanned the bar code, most of the package details will be prepopulated. If you clicked **Manually Add Drug**, then you will need to enter the package details in each field.

   a. On the Add Pack page, review the package details of the fields prepopulated from the scanned barcode. Add any additional information, as needed.

      In addition to the fields, there are additional options to set:

Option Name	Description
Non SAP	
Auto Fill	
Cold Pack	
Auto PV	
PV at Pack	
Pack Confirmation	
Pick Confirmation	
Super Tote Eligible	
No MFG BC	
Scheduling Active	Enable (checked) or disabled (unchecked) slotting to schedule by the order scheduling service. When active, order scheduling will release orders for this slot or shelf.
Fulfillment Active	Enable (checked) or disabled (unchecked) slotting for purposes of filling. When active, orders are available to be filled from this slot or shelf.

   b. After you have reviewed and verified the pack details, including selecting the appropriate switches, click **Add Pack**. This action will create the package entry in the Inventory Manager database for the drug being created. The next step in the Add Drug Wizard is to add a slot.

6. Add a slot.

Note: A drug and shelf entry *must* exist before you can add a slot. If you need to add a new shelf, see *Add Drug Manually* for details.

a. On the Add Slot page, add details about the slot.

   In addition to the fields, there are two additional switches to set:

Switch Name	Description
Scheduling Active	Enable (checked) or disabled (unchecked) slotting to schedule by the order scheduling service. When active, order scheduling will release orders for this slot.
Fulfillment Active (Bleedout)	Enable (checked) or disabled (unchecked) slotting for purposes of filling. When active, orders are available to be filled from this slot.

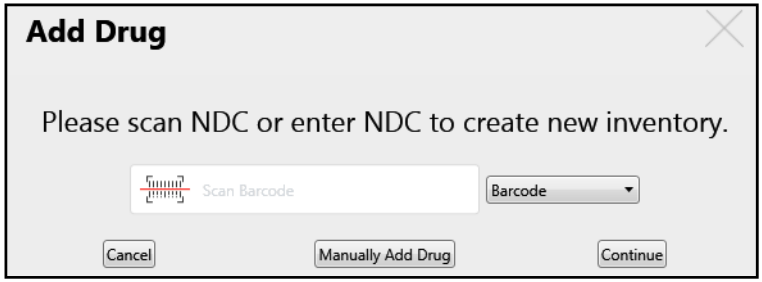
b. After you have reviewed and verified the pack details, including selecting the appropriate switches, click **Add Slot**. This action will create the slot location entry in the Inventory Manager database for the drug being created. After you have added the slot, the Slots page will update to show the new entry.

This is the final step for the Add Drug Wizard. Once complete, you will be able to search for the drug the next time you login to Inventory Manager.

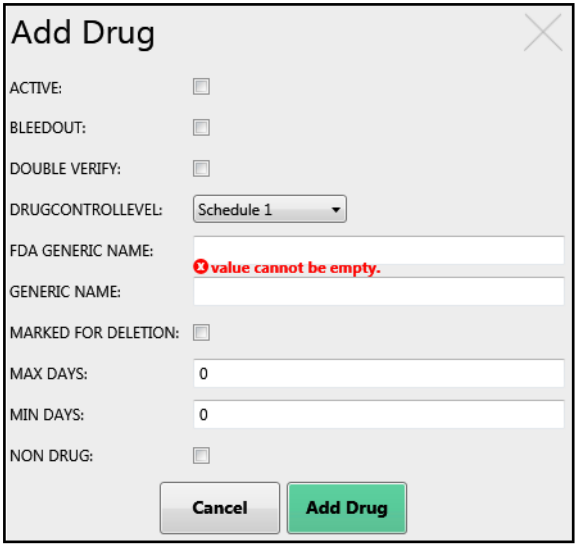
Add Drug Manually

If you do not have the bar code, you can manually add the drug details:

1. After you have successfully logged into Inventory Management, the Manage Inventory page appears by default. If this page does not appear, click **Manage Inventory** at the top of the page.
2. Click **Add Drug** to launch the Add Inventory Item wizard:

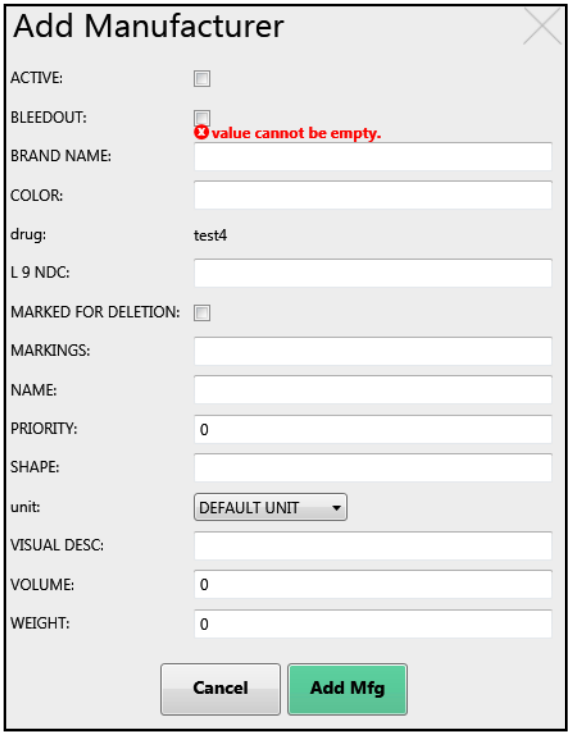


3. Click **Manually Add Drug**. For each part of the inventory item you will need to enter details in the available fields:



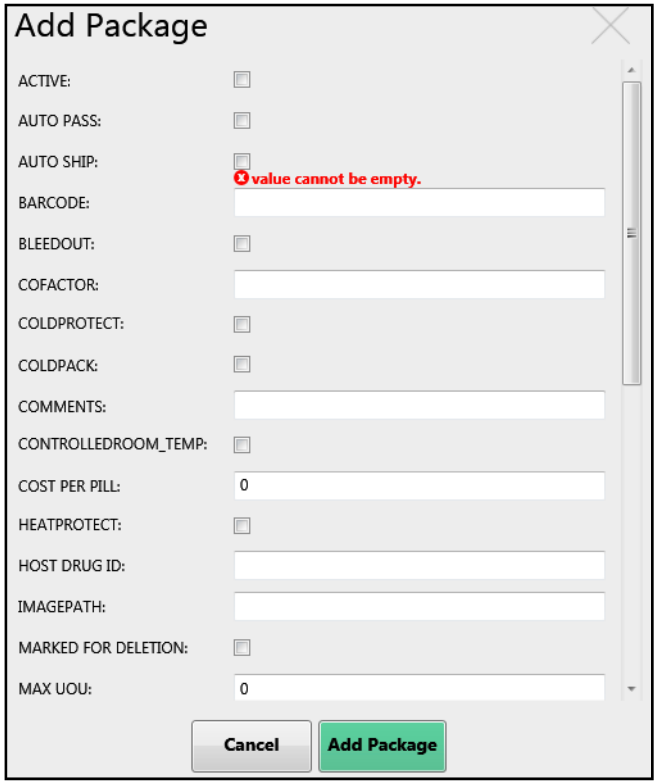
This action creates a drug entry in the Inventory Manager database. You will need to manually add the other details.

4. After you have added the drug entry, double click the entry in the search results. Click **Add Mfg**. The Add Manufacturer page will display as shown below:



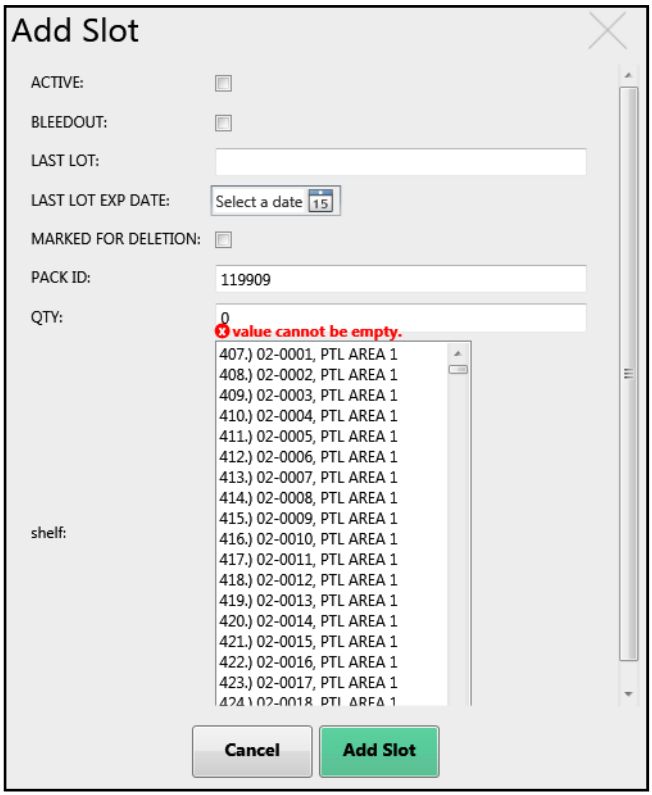
Once you have completed the details of the manufacturer, click **Add Mfg** to add the manufacturer for the drug you have created manually.

5. After you have added the manufacturer, the search page will update to show the manufacturer in the results. Double click the item to add a package. On the Package results page, click **Add Pack**. The Add Package page appears:



Enter the details about the package and click **Add Package** to add the package for the drug you have created manually.

6. After you have added the package, the search page will update to show the package in the results. Double click the item to add a slot. On the Slots results page, click **Add Slot**. The Add Slot page appears:

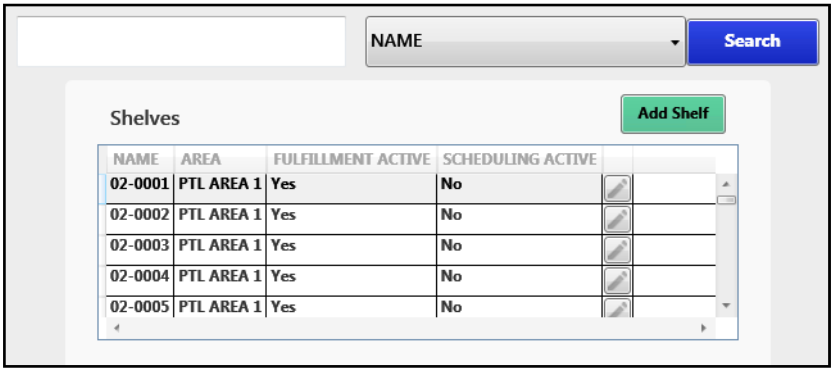


Enter the details about the slot and click **Add Slot** to add the slot for the drug you have created manually. You must select a shelf as part of this addition. A slot cannot exist without a shelf. For details about adding a shelf, see *Add a Shelf*.

Add a Shelf

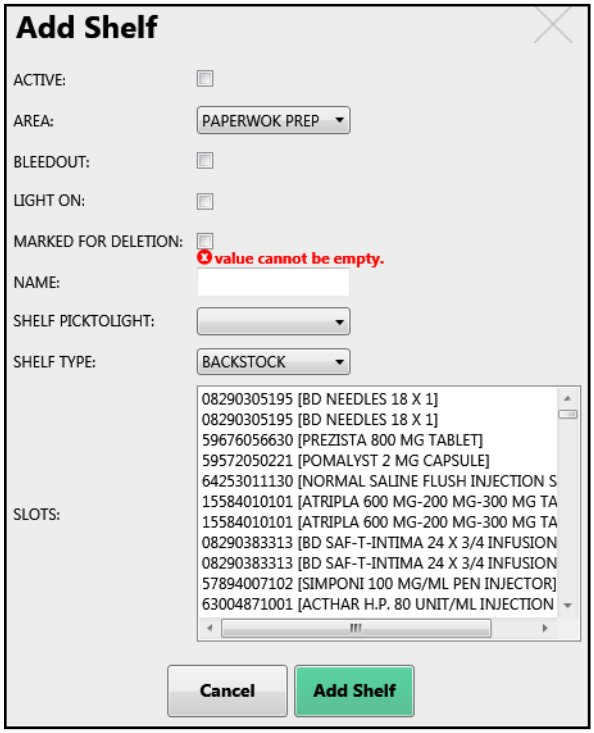
A ***shelf*** is the physical storage location of inventory within an area of a pharmacy. You will need to create a shelf before you assign an inventory item to a slot.

1. Click **Manage Shelves** in the title bar to view a list of available shelves. The page will update to show all available shelves, as shown below:



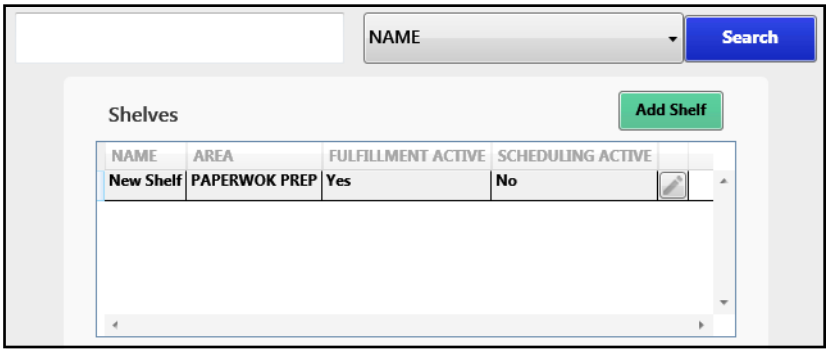
Note: You *must* have at least one shelf before you can add any slots.

2. On the Manage Shelves page, click **Add Shelf**. The Add Shelf page appears as shown below:



Update the details about the shelf you want to add. You must select a name for the self. After you have entered the shelf details, click **Add Shelf**.

3. After you have added the shelf, the Shelves page will update to show the new entry, as shown below:



Modify Inventory Item, Shelf, or Slot Details

Click the edit icon at the end of the entry to edit existing details for any of the following items:

- Drug
- Manufacturer
- Package
- Slot
- Shelf

Note: You can only edit one item at a time.

Once you have edited the details, click **Save**.

Delete an Inventory Item, Shelf, or Slot

To delete an inventory item or shelf from the Inventory Management database, you must mark it for deletion. As the restraints for each item is processed (for example, if there is a drug scheduled for processing), the Inventory Management system will delete the inventory item or shelf automatically. If any inventory item or shelf has an outstanding process enabled, you will be notified with a pop-up warning message.

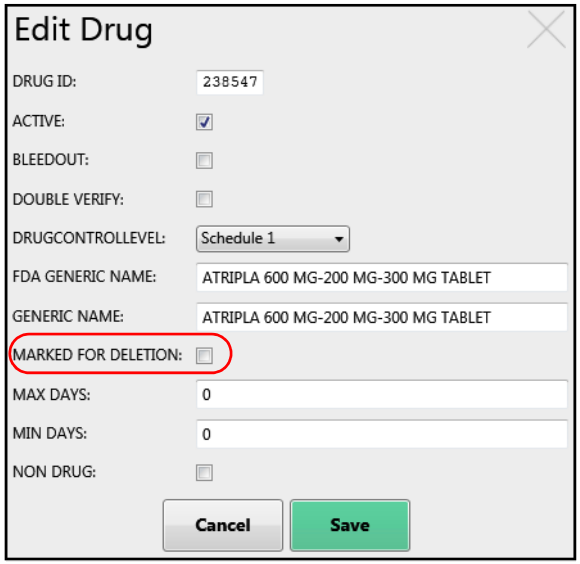
Click the edit icon at the end of the entry to display the details for any of the following items:

- Drug

- Manufacturer
- Package
- Slot
- Shelf

Note: You can only edit one item at a time. Depending on your user permissions, you may not be able to mark a slot or shelf for deletion.

On the edit page for the item you want to delete, select the **Marked for Deletion** option and click **Save**. For example, to delete a drug:



CHAPTER 7

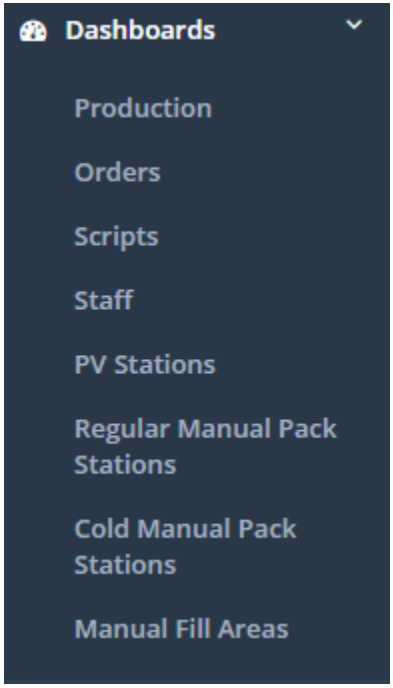
System Manager

System Manager creates a central management console for setting and viewing system parameters, obtaining statistics, and reporting and general systemic tools for the Sanitas Pharmacy Management software suite. System Manager provides a common point for administrative and management functions such as user management, system configuration, reporting, and dashboard facilities.

The following topics are provided:

View the System Manager Dashboards

System Manager provides tools for displaying a dashboard of prescription fulfillment data. With the appropriate View Dashboard permissions, the Dashboard views default to require no specific role for viewing but specific views can be constrained to require a custom role. From the System Manager page, click **Dashboards** to expand the list of available dashboards:



Note: You must have the appropriate user or group permissions to view a dashboard. You can only view a dashboard with the assigned permissions. If you do not have the correct view permissions, then the dashboard will not appear in the menu. See *Manage Groups, Users, and Permissions* for more information. To change these permissions, contact your Sanitas system administrator.

A wide variety of dashboards are provided through System Manager. Select a dashboard from the list to view the updated chart:

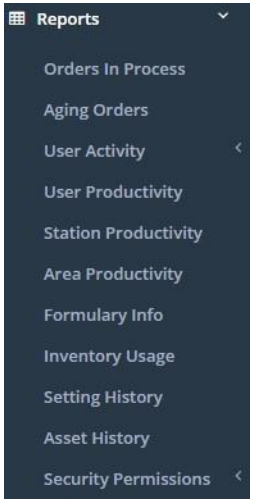
The following table describes the available dashboards:

Dashboard	Description
Production	The Production dashboard displays current production statistics; e.g., scripts/orders processed over time period, scripts/orders currently in process, etc. Mouse over a time to see a pop-up for the exact number of orders sorted.
Orders	The Orders dashboard shows a variety of statistics of the orders being processed throughout the day. For example, orders in process, orders married per hour, average fill time, average pack time, etc.
Scripts	The Scripts dashboard displays the current prescription statistics, including prescriptions received, filled, packed, etc.
Staff	The Staff dashboard shows the authorized users who are logged in to the respective Manual Fill, Pharmacist Verification, and Manual Pack stations. It also identifies the machine names associated with the station.
PV Stations	The Pharmacist Verification (PV) Station dashboard provides statistics of verified orders for each machine associated with the PV station.
Regular Manual Pack Stations	The Regular Manual Pack Station dashboard provides statistics of orders that have been manually packed for each machine associated with the Regular Manual Pack station.

Dashboard	Description
Cold Manual Pack Stations	The Cold Manual Pack Station dashboard provides statistics of orders requiring cold packing that have been packed for each machine associated with the Cold Manual Pack station.
Manual Fill Areas	The Manual Fill Area dashboard shows statistics for the number of prescriptions filled within each area.

Manage Reports

Use System Manager to generate and view reports regarding fulfillment system activity. From the System Manager page, click **Reports** to expand the list of available reports:



Note: You must have the appropriate user or group permissions to view or generate a report. You can only view a report with the assigned permissions. If you do not have the correct view permissions, then the report will not appear in the menu. See *Manage Groups, Users, and Permissions* for more information. To change these permissions, contact your Sanitas system administrator.

For each report, you can save it as either a `.csv` (comma-delimited values) or PDF (viewable in Adobe Acrobat). In the lower-left area of the report grid:

- Click the CSV icon CSV to save the report as a comma-delimited file. You can then import this file into such spreadsheet applications like Microsoft Excel.
- Click the PDF icon PDF to save the report as a PDF file. You can then view the report using your preferred PDF viewer, such as Adobe Acrobat Reader.
- Click the search icon to search the report. You can search by the available columns of the report.
- Click the refresh icon to reload the report.

Note: You may need to update your browser's download settings to select a location for the files to be downloaded.

Tip: When available, click the help icon in the lower-right corner of the report page for a short description of the report.

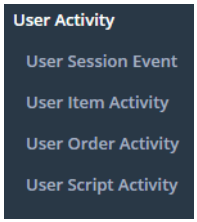
The following table describes the available reports provided by System Manager:

Report	Description
Orders in Process	This report shows all orders that are currently being filled (that is, those that have not yet been filled).
Aging Orders	This report shows the orders that have not been packed that were received more than 24 hours ago or more. Select the number of days from the drop-down menu and click **Run Report** to generate the Aging Orders report.
User Activity	This report describes activity of a user within the system over a specified time range. It includes all secured operations and session events. The report will minimally present the time at which the activity occurred, the station at which the activity occurred, and the specific action performed by the user. See *User Activity Report* for details to generate a user activity report.
User Productivity	This report describes the productivity of an operator or operators over a specified time range. Productivity is measured by a configurable set of events registered during the time range. See *User Productivity Report* for details To generate a user productivity report.

Report	Description
Station Productivity	This report describes productivity of a station or stations over a specified time range. Productivity is measured by a configurable set of events registered during the time range. Select a station from the Select Station drop-down menu (**ALL STATIONS** is selected by default). Then select a start date and time from the Start Date and End Date fields. Finally, click **Run Report** to generate the station productivity report (or click **New Search** to reset the search fields).
Area Productivity	This report describes productivity of an area or areas over a specified time range. Productivity is measured by a configurable set of events registered during the time range. Select an area from the Select an Area drop-down menu (**ALL AREAS** is selected by default). Then select a start date and time from the Start Date and End Date fields. Finally, click **Run Report** to generate the area productivity report.
Formulary	The Formulary Report shows all details of slotting within the pharmacy.
Inventory Usage	This report shows the dispensed quantity of inventory product over a specified time range. Select a start date and time from the Start Date and End Date fields. Click **Run Report** to generate an inventory usage report.
Setting History	The Setting History report shows all system settings history for a specific time range. Select a start date and time from the Start Date and End Date fields. Click **Run Report** to generate a system setting history report.
Asset History	The Asset History report shows asset change history for a specific time range. Select a start date and time from the Start Date and End Date fields. Click **Run Report** to generate an asset history report.
Security Permissions	System Manager provides summary reports of security permissions assigned. You can generate reports based on all permissions assigned or a list of permissions assigned to a specific user. See *Security Permissions Reports* for details about the different report types.

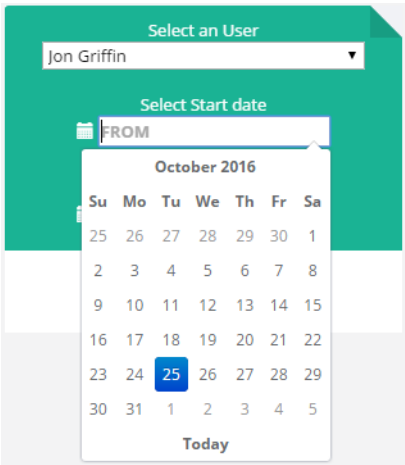
User Activity Report

From the Reports menu, select **User Activity**, then select the activity type:



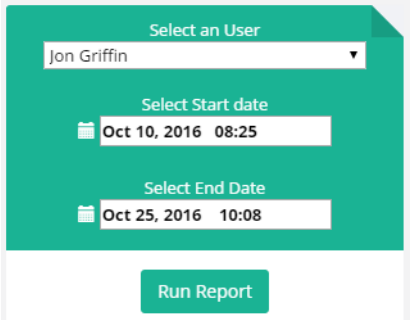
To generate a user activity report:

1. From the System Manager page, select **Reports**, then select **User Activity**, and finally, select one of the user activity reports:
   - User Session Event
   - User Item Activity
   - User Order Activity
   - User Script Activity
2. Once you have selected a user activity report, click the **Select a User** drop-down menu to select an available user.
3. Next, select a start date for when you want the report to begin. Click in the **Select Start Date** field to choose a date, as shown below:



After you have selected the date, you can set a specific start time. Click the time you want the report to begin.

4. Repeat the date/time selection for the end date. The following figure shows an example of the date/time selections:

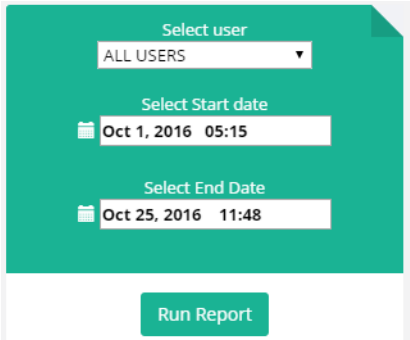


5. Once you have set the date, click **Run Report** to generate the user activity report.

User Productivity Report

To generate a user productivity report:

1. From the Reports menu, select **User Productivity**.
2. Select a user from the Select User drop-down menu. By default, **ALL USERS** is selected.
3. Select a start date and time from the Start Date and End Date fields. The figure below shows the completed fields:



4. Click **Run Report** to generate the user productivity report:

USER PRODUCTIVITY REPORT FOR SCRIPT

	User Name	Action	Action Count
1	Admin	FILLED	2
2	Admin	PHARMACIST VERIFIED	3

CSV PDF Page 1 of 1 20 View 1 - 2 of 2

Security Permissions Reports

From the Reports menu, select **Security Permissions** to show the available reports:

Select a report from the list to generate a report for:

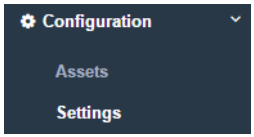
- **All Permissions** – this report shows all permissions available to each application of the Sanitas Pharmacy Management suite. From **Security Permissions**, select **All Permissions** to display the security permission report.
- **Permissions Per User** – this reports shows all of the permissions assigned to a specific user. From **Security Permissions**, select **Permissions Per User**. From the user drop-down list, select a user and click **Run Report** to generate the permission per user report.
- **Users Per Permission** – this report shows all of the users assigned to a specific permission for an application. From **Security Permissions**, select **Users Per Permissions**. From the drop-down menu, select an application permission and click **Run Report** to generate the user per permission report.

Manage System Settings

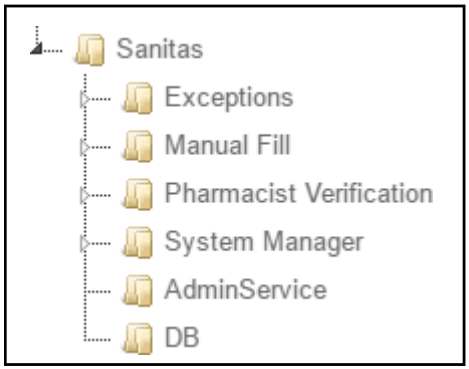
System Manager provides mechanisms for managing global system settings for all Sanitas Pharmacy Management applications or for a single application. Examples of system settings include data

retention policies for history tables, application-specific logout times, flags to enable or disable specific system features or workflow options, etc.

1. From the Configuration menu, click **Settings**:



2. Click to expand the **Sanitas** item to display all applications that can be modified:



3. Select an item from this list to modify the system settings.

   Note: some items include global settings (for example, AdminService, DB) that affect all applications.

Note: You must have the appropriate user or group permissions to update the assets or settings configuration. You can only view a configuration with the assigned permissions. If you do not have the correct view permissions, then the Assets or Settings items will not appear in the menu. See *Manage Groups, Users, and Permissions* for more information. To change these permissions, contact your Sanitas system administrator.

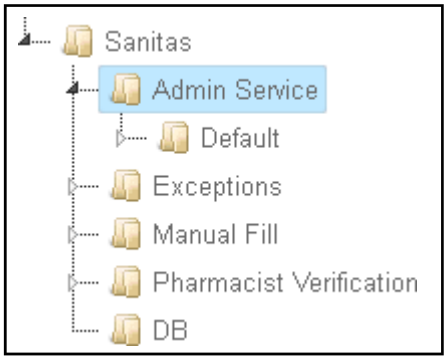
Use System Manager to *Change a System Setting for a Single Application or a Specific Station*.

You can view a summary of all changes made for a specified time range. See *Manage Reports* for details.

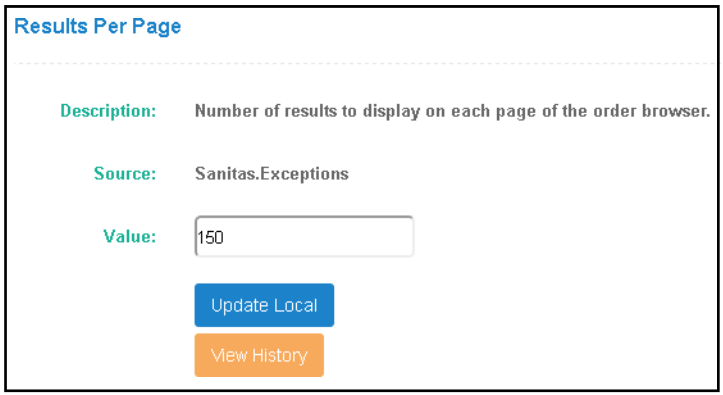
Note: Because all Sanitas Pharmacy Management software applications are authenticated and authorized through the AdminService, changes for **AdminService** affect all applications.

In this example, change the maximum password age from **45** days to **90** days:

1. From the Configuration menu, select **Settings**.
2. Expand the **Sanitas** item and click **AdminService**:



3. Click the **Security** item to show all security settings that can be changed. In the Maximum Password Age region, update the **Value** field from **45** to **90**:



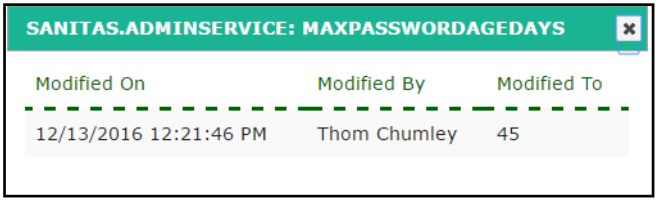
4. Click **Update Local** to apply the changes. All passwords now expire after 90 days.

Other security settings include:

- Maximum password reuse interval: The number of times the password may be changed before an old password may be reused.
- Minimum password character classes: The minimum number of character classes that must be present in a new password to be allowed by the 'Change Password' function.

- Minimum password length: The minimum length of passwords allowed by the 'change password' function.

Click **View History** to view a summary of all changes for the item:



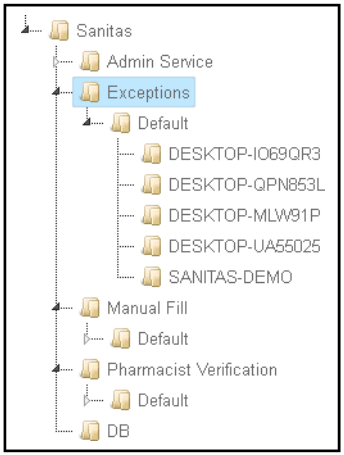
Change a System Setting for a Single Application or a Specific Station

Use System Manager to modify the values for a single application or a specific station within the Sanitas Pharmacy Management software suite.

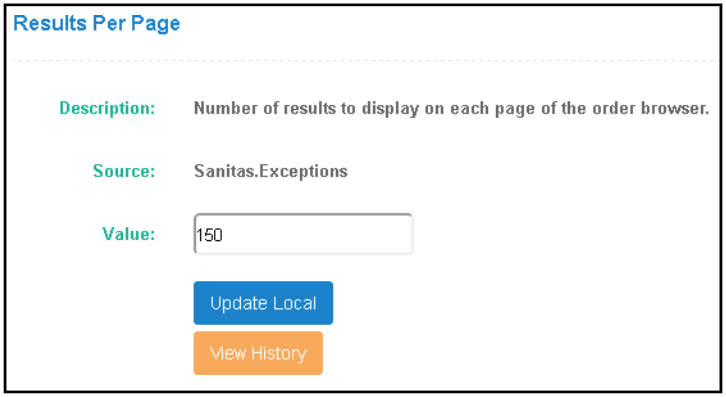
Single Application Settings for All Stations

Use System Manager to update a setting for an application that will apply for all stations that use the application. In this example, change the results per page for the Exceptions application:

1. From the Configuration menu, select **Settings**.
2. Expand the **Sanitas** item and click **Exceptions**:



3. Click **General** to expand the current application settings. In the **Results Per Page** section's **Value** field, change **100** to **150**:



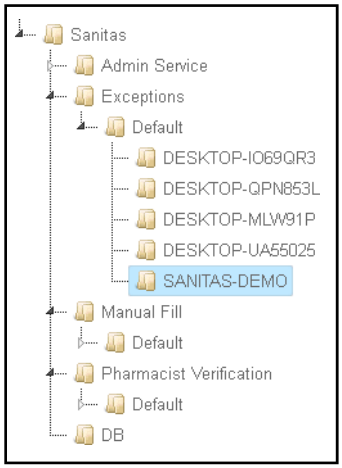
4. Click **Update Local** to apply the changes.

With this setting, all stations that use the Exceptions application will display **150** results instead of 100. Because this affects all stations, you do not have to update each station with the change.

Single Application Settings for a Specific Station

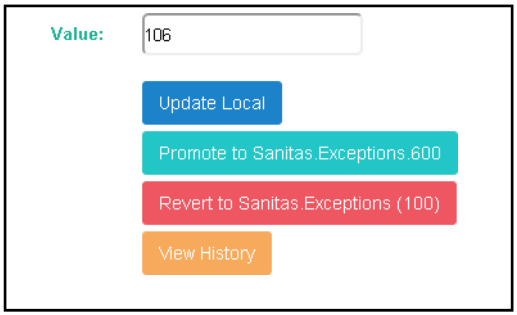
Use System Manager to update a setting for an application that will apply for a specific station that uses the application. In this example, change the results per page for the Exceptions application used by a specific station:

1. From the Configuration menu, select **Settings**.
2. Expand the **Sanitas** item, expand click **Exceptions**, expand **Default**, and finally select a specific station. For this example, select **SANITAS-DEMO**:

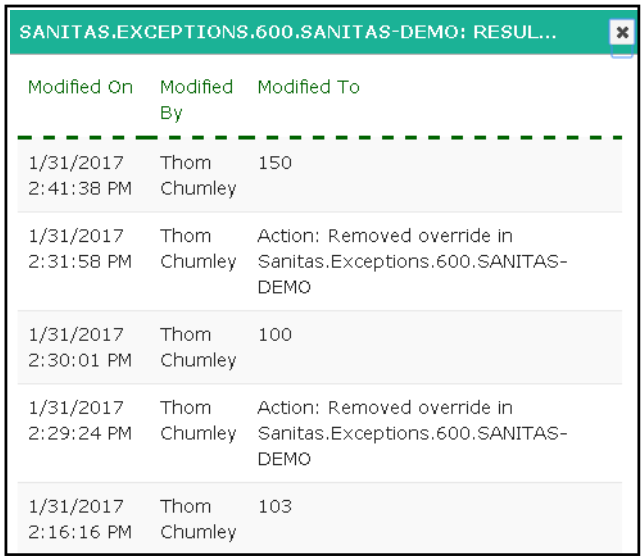


3. Click **General** to expand the current application settings. In the **Results Per Page** section's **Value** field, change **100** to **106**:

4. Click **Override Sanitas.Exceptions** to apply the change to the SANITAS-DEMO station.
5. You can also promote the change to the parent. For example, if you want this change to be applied for all other stations, then select the **SANITAS-DEMO** station from the expanded list and click **General** to expand the options for the Exceptions application.
6. You can now make the following changes:
   - Enter a new change for the station. If you choose a new value, enter the change and click **Update Local**.
   - Click **Promote to Sanitas.Exceptions.600** to make the change for all stations. When other stations launch the Exceptions application, the new value of **106** will be used.
   - Click **Revert to Sanitas.Exceptions (100)** to change the SANITAS-DEMO station back to the parent's value of **100**.



Click **View History** to view all of the changes applied for the selected scope:

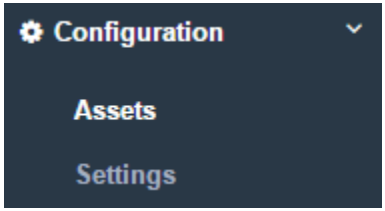


Modified On	Modified By	Modified To
1/31/2017 2:41:38 PM	Thom Chumley	150
1/31/2017 2:31:58 PM	Thom Chumley	Action: Removed override in Sanitas.Exceptions.600.SANITAS-DEMO
1/31/2017 2:30:01 PM	Thom Chumley	100
1/31/2017 2:29:24 PM	Thom Chumley	Action: Removed override in Sanitas.Exceptions.600.SANITAS-DEMO
1/31/2017 2:16:16 PM	Thom Chumley	103

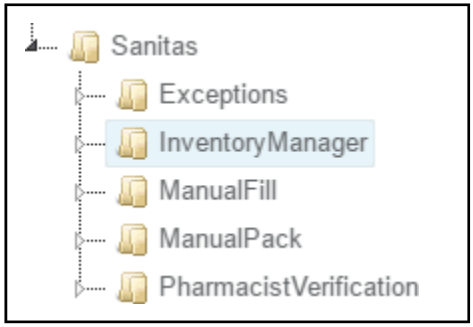
Manage Assets

All applications within the Sanitas Pharmacy Management software suite, including System Manager, uses a variety of files (assets) to provide you with the functionality to complete the prescription functionality process. For example, if a new drug is released with a new picture, then the image would need to be uploaded for all applications to display it.

From the Configuration menu, click **Assets**:



Expand the top-level Sanitas item to show all available applications within the suite:



Note: You must have the appropriate user or group permissions to update the assets or settings configuration. You can only view a configuration with the assigned permissions. If you do not have the correct view permissions, then the Assets or Settings items will not appear in the menu. See *Manage Groups, Users, and Permissions* for more information. To change these permissions, contact your Sanitas system administrator.

Click an application and use System Manager to perform the following housekeeping tasks:

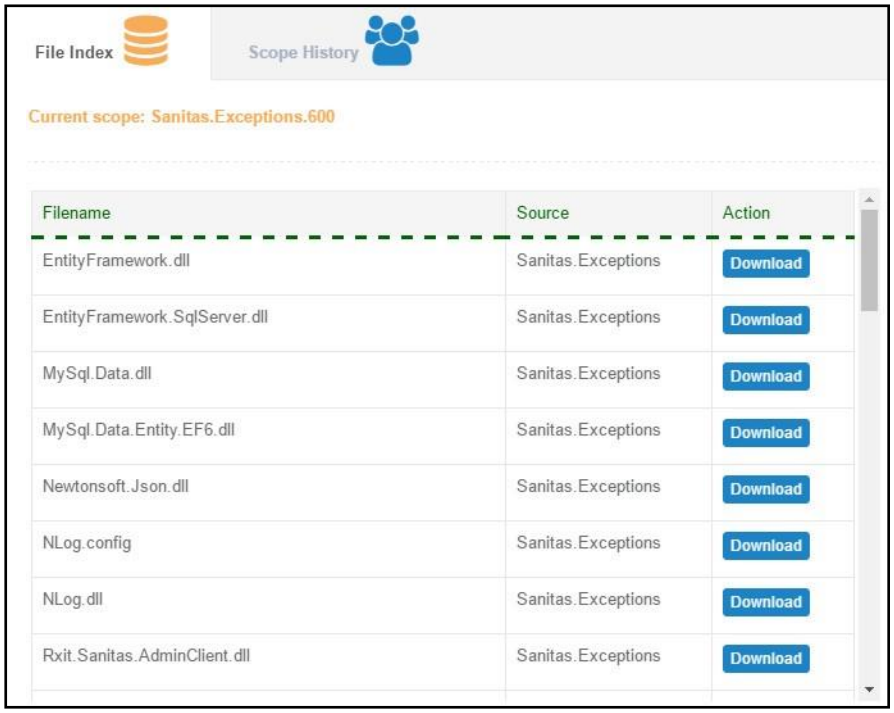
- *Download an Asset*
- *Upload and Promote an Asset*
- *Delete an Asset*
- *View Asset History*

You can view a summary of all asset changes made for a specified time range. See *Manage Reports* for details.

Download an Asset

To download an asset from the Sanitas filesystem:

1. From the Configuration menu, select **Assets**.
2. Expand the top-level Sanitas item to show all available applications within the suite. For this example, click and expand **Exceptions**.
3. A list of the available files are displayed under File Index:



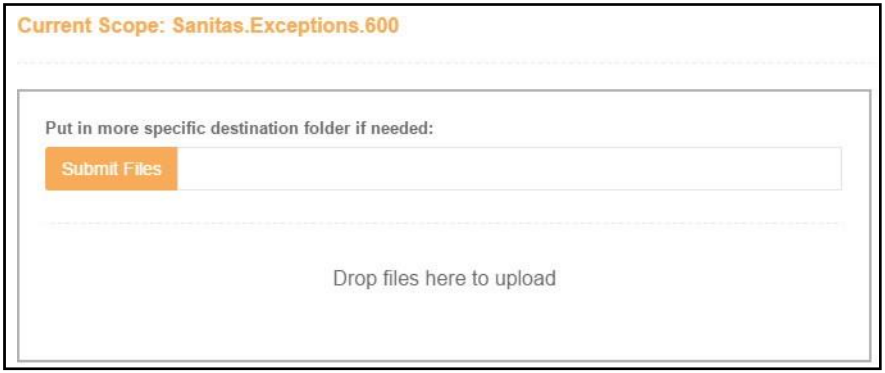
4. For the file you want to download, click **Download** and then select a location in the **Save As** pop-up window.

Upload and Promote an Asset

For this task, you will upload a file to the Default scope and then promote the file to the Sanitas parent scope. Once promoted, then the file will be available for all applications within the Sanitas Pharmacy Management software suite. To promote an asset:

1. From the Configuration menu, select **Assets**.

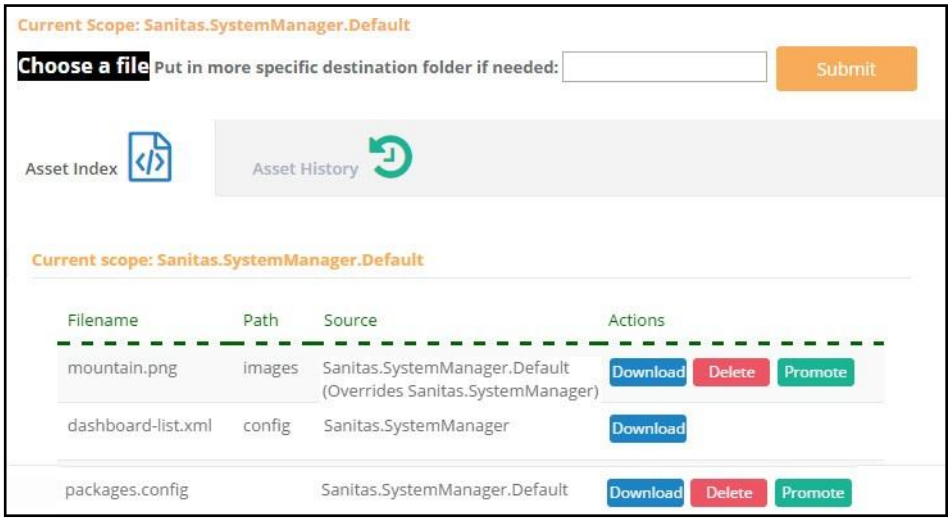
2. Expand the top-level Sanitas item to show all available applications within the suite. For this example, click and expand **Exceptions**. Click **600** to select the next level below Exceptions.
3. The page will update to show the current location:



4. System Manager supports the "drag and drop" functionality. You can drag one or more files that you want to upload in the region provided. In the text field, you can enter the location for a specific folder you want to upload the file (for example, "Views").

   Once you have added the files, click **Submit Files** to upload them from your machine.
5. Click your browser's **Refresh** button to show the updated File Index. Depending on the files uploaded and the files currently available, the following buttons will appear for you to complete the task:
   - **Promote to_____:** Click this button to move the new file to the parent scope. This Promote button will update to show only the parent scope. In this example (in the figure below), the button updates to **Promote to Sanitas**, which is the top-level scope. Promoting a file to that level will make it available to all applications in the Sanitas Pharmacy Management software suite.

     Note: Once you promote the file, it will automatically be removed locally.
   - **Remove Override:** Click this button to revert your uploaded file to the parent's version.



Delete an Asset

To delete an asset:

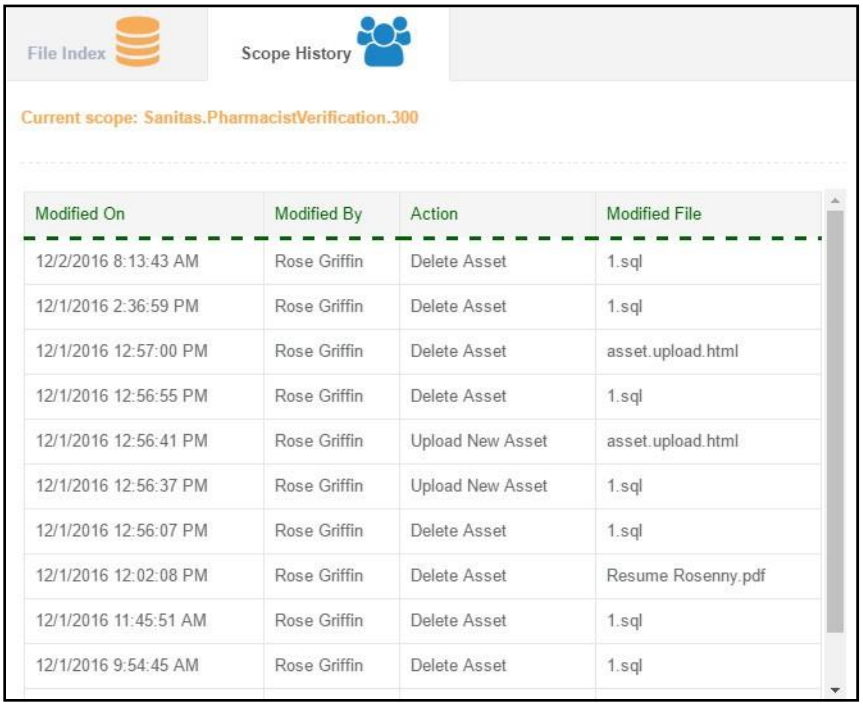
1. From the Configuration menu, select **Assets**.
2. Expand the top-level Sanitas item to show all available applications within the suite. For this example, click and expand **Exceptions**.
3. Click the **Delete Local** button to remove the file from the Default scope.

   Note: Repeat the steps above if you need to remove a file from the parent scope.

View Asset History

To view the activity of a particular asset:

1. From the Configuration menu, select **Assets**.
2. Expand the top-level Sanitas item to show all available applications within the suite. For this example, click and expand **Pharmacist Verification**.
3. Click the **Scope History** tab to display the history details of the selected scope:



Modified On	Modified By	Action	Modified File
12/2/2016 8:13:43 AM	Rose Griffin	Delete Asset	1.sql
12/1/2016 2:36:59 PM	Rose Griffin	Delete Asset	1.sql
12/1/2016 12:57:00 PM	Rose Griffin	Delete Asset	asset.upload.html
12/1/2016 12:56:55 PM	Rose Griffin	Delete Asset	1.sql
12/1/2016 12:56:41 PM	Rose Griffin	Upload New Asset	asset.upload.html
12/1/2016 12:56:37 PM	Rose Griffin	Upload New Asset	1.sql
12/1/2016 12:56:07 PM	Rose Griffin	Delete Asset	1.sql
12/1/2016 12:02:08 PM	Rose Griffin	Delete Asset	Resume Rosenny.pdf
12/1/2016 11:45:51 AM	Rose Griffin	Delete Asset	1.sql
12/1/2016 9:54:45 AM	Rose Griffin	Delete Asset	1.sql

You can also view a summary of all asset changes made for a specified time range. See *Manage Reports* for details.

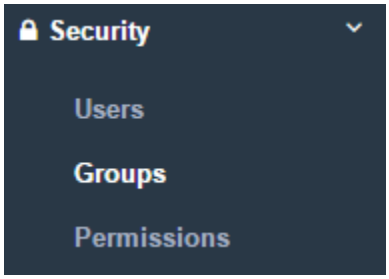
Manage Groups, Users, and Permissions

Only authorized users can access and use the software suite to process a prescription fulfillment. Use System Manager to create user accounts and assign users to groups with specific roles and permissions. This chapter describes how to create modify users and groups in the following sections:

- *Manage Groups*
- *Manage Users*
- *Remove Permissions from Groups and Users*

Manage Groups

This section describes how to create and modify groups. From the Security menu, select **Groups**:

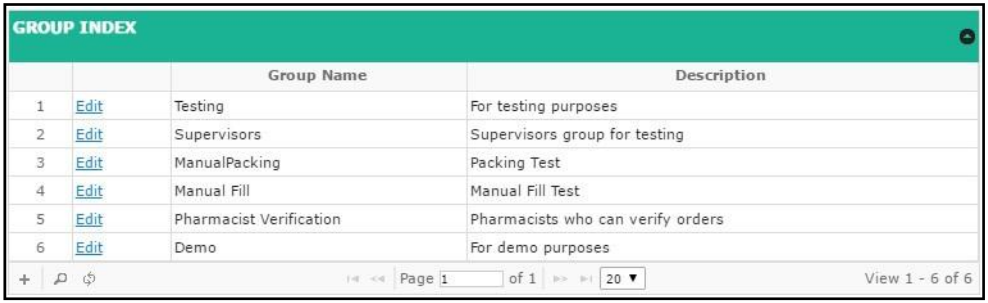


The following topics are provided:

- *View Group Index*
- *Create a New Group*
- *Modify Group Details*
- *Add/Remove Permissions to a Group*
- *Add/Remove Users to a Group*
- *Delete a Group*

View Group Index

From the Security menu, select **Groups**. The following active list of all groups appears:



GROUP INDEX

		Group Name	Description
1	Edit	Testing	For testing purposes
2	Edit	Supervisors	Supervisors group for testing
3	Edit	ManualPacking	Packing Test
4	Edit	Manual Fill	Manual Fill Test
5	Edit	Pharmacist Verification	Pharmacists who can verify orders
6	Edit	Demo	For demo purposes

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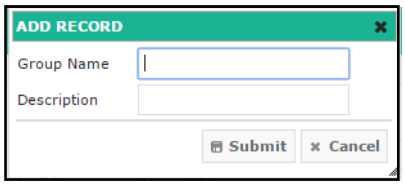
Create a New Group

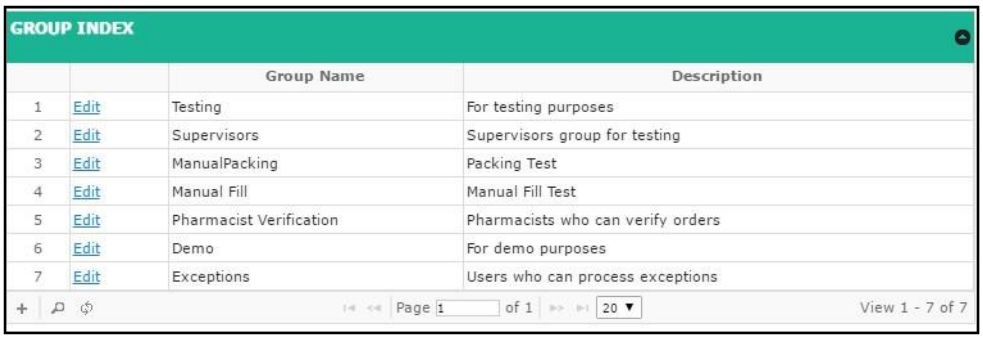
For supervisors who manage groups:

1. From the Security menu, select **Groups**.
2. Select the **Add** button in the lower left-hand corner of the Group Index. The following Add Record pop-up window will appear:



3. Enter a unique group name in the **Group Name** field. This is the name that you will reference when adding users to the group.
4. Enter a description of the group in the **Description** field.
5. Click **Submit**.

The Group Index list will update with the new group added as shown below:



		Group Name	Description
1	Edit	Testing	For testing purposes
2	Edit	Supervisors	Supervisors group for testing
3	Edit	ManualPacking	Packing Test
4	Edit	Manual Fill	Manual Fill Test
5	Edit	Pharmacist Verification	Pharmacists who can verify orders
6	Edit	Demo	For demo purposes
7	Edit	Exceptions	Users who can process exceptions

Modify Group Details

You can change the name or description of the group any time. From the Security menu, select Groups. On the Group Index, click **Edit** for the group you want to change. In the Details region, you can update the group name and description in the fields provided. Once you have made your changes, click **Save Changes**.

Add/Remove Permissions to a Group

Once you have created a group, you need to add permissions to it. By adding permissions to a group, you can control the permissions of many users at one time.

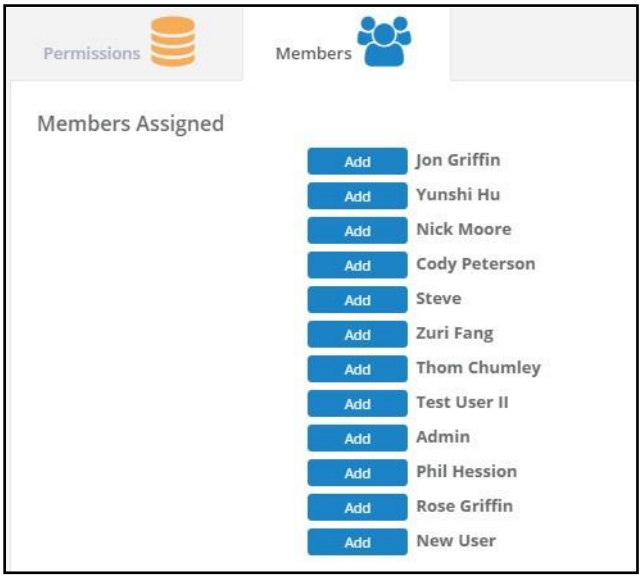
By default, the Permissions tab is already selected and a complete list of all permissions is displayed. Each permission shows the application and the individual permission to be assigned.

For this example of an Exceptions group, click **Add** for each Exceptions permission:

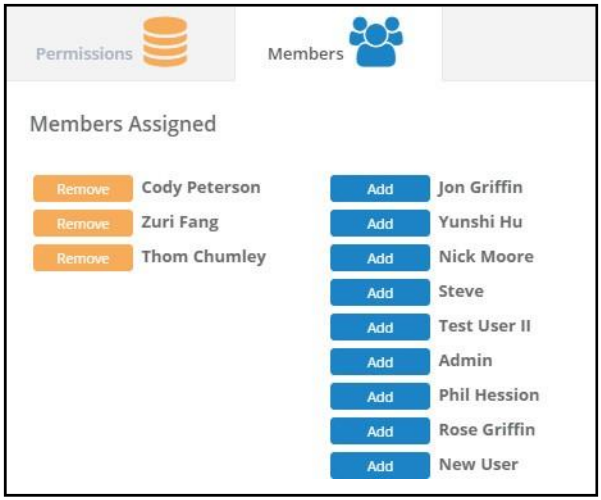
To remove a permission from a group, click **Remove** for each permission you want to be removed.

Add/Remove Users to a Group

Add users to a group. Click the **Members** tab to view a list of all active users:



Click **Add** to assign a user to the group. Once you have added the users to the group, refresh the page to view the updated members list:



Click **Remove** to remove a user from a group.

You can view the user details to verify that they have been added to the group:

1. From the Security menu, select **Users**.
2. In the Active User Index, click
3. **Edit** for the user you want to verify.
4. On the user profile page, you can see the new group added on the Groups tab (selected by default):

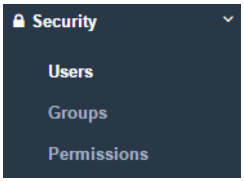
Delete a Group

To delete a group:

1. From the Security menu, select **Groups**.
2. For the group you want to delete, click **Edit**.
3. In the Details region of the group, click **Delete Group**.

Manage Users

This section describes how to create and modify user accounts. From the Security menu, select **Users**:



The following topics are provided:

- *View Active Users*
- *Add New User*
- *Modify User Profile and Assign Permissions*

View Active Users

From the Users menu, select **Manage Users**. The following active list of all users appears:

ACTIVE USER INDEX

		Username	Display Name	Domain	Is Active
1	Edit	jgriffin	Jon Griffin	rxit.local	true
2	Edit	yhu	Yunshi Hu	rxit.local	true
3	Edit	nmoore	Nick Moore	rxit.local	true
4	Edit	cpeterson	Cody Peterson	rxit.local	true
5	Edit	shession	Steve	rxit.local	true
6	Edit	zfang	Zuri Fang	rxit.local	true
7	Edit	tchumley	Thom Chumley	rxit.local	true
8	Edit	Testing	Test User II	rxit.local	true
9	Edit	admin	Admin	rxit.local	true
10	Edit	phession	Phil Hession	rxit.local	true
11	Edit	rgriffin	Rose Griffin	rxit.local	true
12	Edit	new_user	New User	rxit.local	true
13	Edit	user1	User One	rxit.local	true
14	Edit	user2	User Two	rxit.local	true
15	Edit	NoPermissions	No Permissions	rxit.local	true
16	Edit	auto	Automation	rxit.local	false
17	Edit	marcinp	Marcin P	rxit.local	true
18	Edit	FATTest	FAT Test	rxit.local	true
19	Edit	Demo	Demo	rxit.local	true

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From this list, you can create a new user and edit existing user profiles as described below.

Note: Once a user is created, the record cannot be deleted with System Manager. You can disable the user's account, but the record itself is always preserved.

Add New User

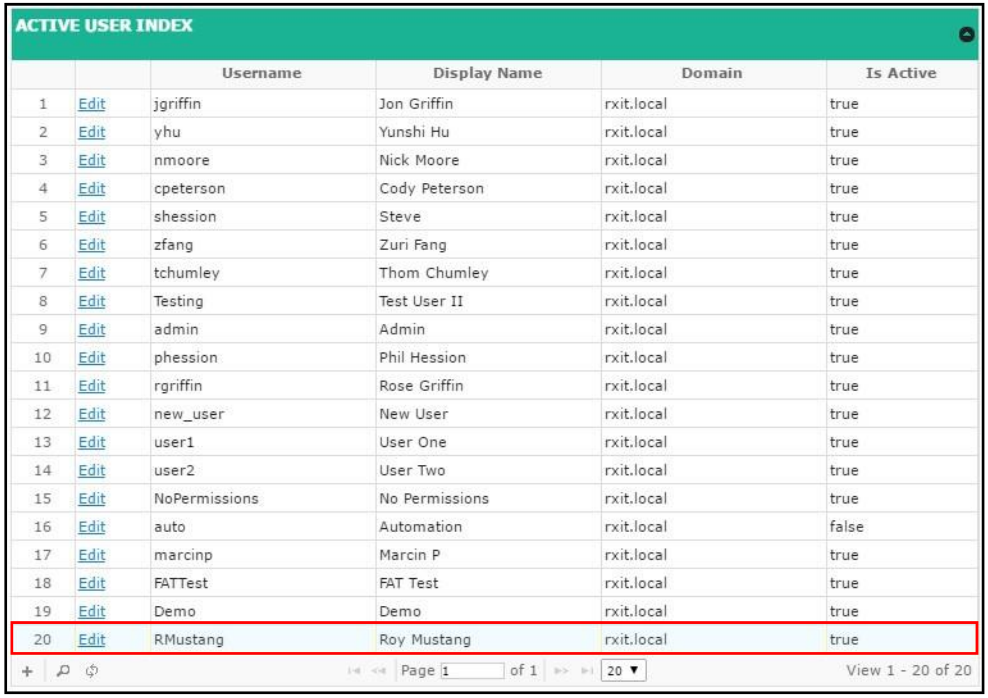
For supervisors who manage users:

1. From the Security menu, select **Users**.

2. Select the **Add** button in the lower left-hand corner of the Active User Index. The following Add Record pop-up window will appear:

3. Enter a unique user name in the **User Name** field. This is the name that the new user will use to login.
4. Enter a display name in the **Display Name** field.
5. Enter a valid domain in the **Domain** field.
6. Click **Submit**.

The Active User Index list will update with the new user added as shown below:



ACTIVE USER INDEX

		Username	Display Name	Domain	Is Active
1	Edit	jgriffin	Jon Griffin	rxit.local	true
2	Edit	yhu	Yunshi Hu	rxit.local	true
3	Edit	nmoore	Nick Moore	rxit.local	true
4	Edit	cpeterson	Cody Peterson	rxit.local	true
5	Edit	shession	Steve	rxit.local	true
6	Edit	zfang	Zuri Fang	rxit.local	true
7	Edit	tchumley	Thom Chumley	rxit.local	true
8	Edit	Testing	Test User II	rxit.local	true
9	Edit	admin	Admin	rxit.local	true
10	Edit	phession	Phil Hession	rxit.local	true
11	Edit	rgriffin	Rose Griffin	rxit.local	true
12	Edit	new_user	New User	rxit.local	true
13	Edit	user1	User One	rxit.local	true
14	Edit	user2	User Two	rxit.local	true
15	Edit	NoPermissions	No Permissions	rxit.local	true
16	Edit	auto	Automation	rxit.local	false
17	Edit	marcinp	Marcin P	rxit.local	true
18	Edit	FATTest	FAT Test	rxit.local	true
19	Edit	Demo	Demo	rxit.local	true
20	Edit	RMustang	Roy Mustang	rxit.local	true

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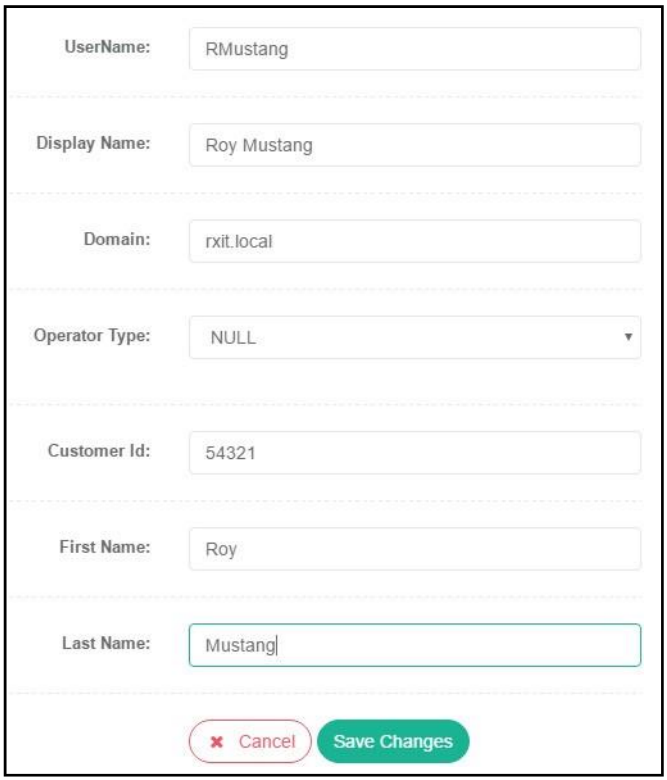
Modify User Profile and Assign Permissions

After you have created a user, you now need to assign permissions to the user so that they can access the applications in support of prescription fulfillment. Follow the steps below to modify a user profile:

1. From the Security menu, select **Users**.
2. In the Active User Index, click **Edit** for the user you wish to modify. The following user profile page will display:

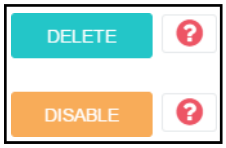


3. Modify user details. In the fields provided, you can modify:
   - User Name
   - Display Name
   - Domain
   - Operator Type – from this drop-down menu, select the type of operator (for example, Pharmacist, Pharmacy Technician)

- Customer ID
- First Name
- Last Name

Once you have updated the appropriate fields, click **Save Changes**.

4. Modify the user activation. Click the buttons to modify the activation status of a user:



By default, all new users are activated. Select the following buttons:

- **Delete:** The user will no longer be allowed to log on. All permissions will be removed.
- **Disable:** Disabled user accounts will no longer be allowed to log on anywhere in the system.

Note: Once a user is created, the record cannot be deleted with System Manager. You can disable the user's account, but the record itself is always preserved. To enable a user that has been disabled, click **Enable**.

5. Assign user to a group. By default, a new user is not assigned to any group. By assigning a user to a group, the user then assumes all of the permissions allowed for the group.
   - Click **Add** to assign the user to a group.
   - Click **Remove** to remove the user from a group.

   For more information about groups, see *Manage Groups*.

6. Assign specific permissions to a user. The permissions you assign to a user are associated with a specific application of the Sanitas Pharmacy software suite.

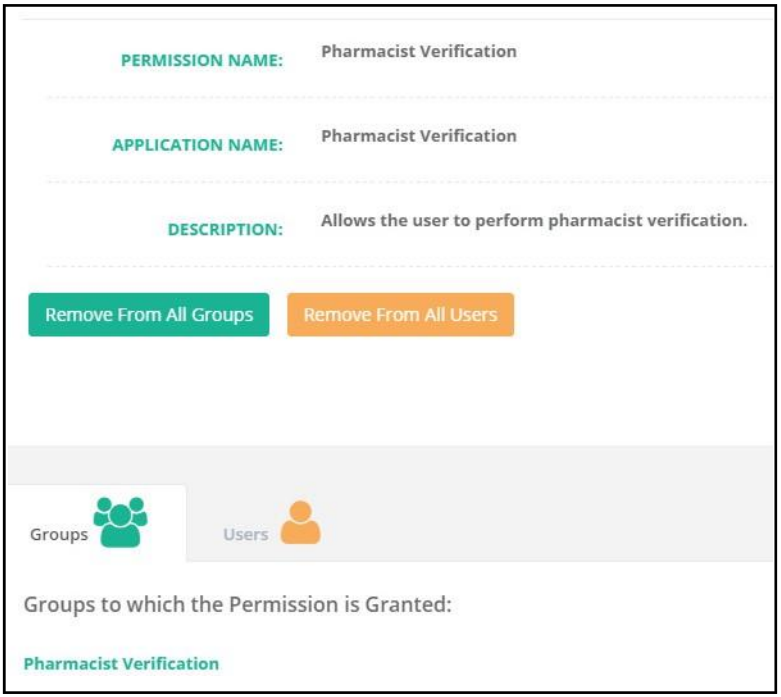
   Click the **Permissions** tab to see all permissions assigned for a user.
   - If you have assigned a user to a group, then all permissions associated with the group appears in the **Permissions Granted Through Permission Groups** list. For these permissions, you cannot remove them for the user. See *Manage Groups* for details on managing permissions for groups.
   - If there are additional permissions you want to assign, click **Add** by the permission item you want to assign. The permissions you add are associated with a specific application of the Sanitas Pharmacy software suite.
   - Click **Remove** to remove an assigned permission.

7. After you have completed the modifications, click **Save Changes**.

Remove Permissions from Groups and Users

You can quickly remove permissions from multiple groups and users:

1. From the Security menu, select **Permissions**.
2. On the Permissions Index, click **Edit** for the permission you want to modify for an application. The permissions details page will display:



The page shows the following detail:

- Permission Name
- Application Name
- Description
- Groups to which the permission is granted (Groups tab is selected by default)
- Users to which the permission is granted (click the **Users** tab to display the list of users)

Note: the only action you can take here is to remove the permissions.

3. Remove the permissions:

- Click **Remove From All Groups** to remove the selected permission for all permission groups. This action removes the permissions for any user assigned to the group(s).
- Click **Remove From All Users** to remove the selected permission from all users to which it had been assigned individually.

CHAPTER 8

Order Scheduler

Order Scheduler provides authorized users the ability to adjust the flow of totes through a pharmacy to ensure efficient processing of prescription (Rx) orders.

Note: You must have the appropriate permissions to use Order Scheduler as well as to view dashboards and reports within System Manager. See *Manage Groups, Users, and Permissions* for details about setting permissions.

Once an order is married to a tote, it is added to the system to be processed. Order Scheduler classifies each order to be processed into one of seven categories:

1. **Single Item TCA** (tablet counting automation) – The order is one Rx and one item. It is counted from automation.
2. **Single Item TCM** (table counting manual) – The order is one Rx and one item. It is counted manually (that is, bulk counting).
3. **Single Item UUA** (unit of use automation) – The order is one Rx and one item. It is dispensed by automation.
4. **Single Item UUM** (unit of use manual count) – The order is one Rx and one item. It is dispensed manually.
5. **TC Only** (tablet counting only) – The order is multiple Rx's and/or tablet/pill items. It is counted by automation and/or manually.
6. **UU Only** (unit of use only) – The order is multiple Rx's and/or unit-of-use items (for example, syringe, nebulizer, etc.). It is counted by automation and/or manually
7. **Multi Fulfillment** – mix of all the above.

As part of the classification process, Order Scheduler automatically checks for capacity. If the capacity for the order's profile cannot be met, the order is placed **on hold**. See *Order Scheduler Hold* for more details.

Once an order is profiled, Order Scheduling schedules and then releases the order to be filled and packed.

While System Manager can manage the maximum totes in the system (the number of married totes in the system) and area tote capacities (the number of married totes destined for a particular area), you can use Order Scheduler to adjust the order profile capacities throughout a typical workday.

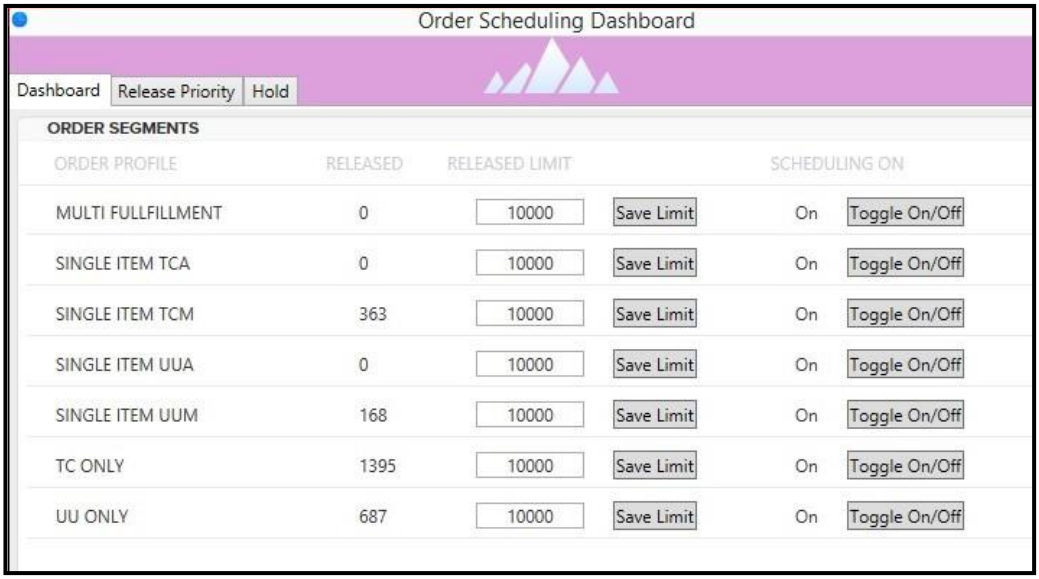
The **Orders Scheduled by Area – Not in Tote** report breaks down orders by which zone they are schedule for. If there is a large number of orders waiting to be married, then look at the dashboard and see if the associated area capacities are met. If needed, increase the area capacity.

The following topics describe the Order Scheduler functionality:

- *Order Scheduler Dashboard*
- *Order Scheduler Release Priority*
- *Order Scheduler Hold*

Order Scheduler Dashboard

Once you login to the Order Scheduler application, the Dashboard tab is displayed by default as shown below:



Order Scheduler Release Priority

Content to be supplied.

Order Scheduler Hold

Content to be supplied.

CHAPTER 9

Glossary

Carrier – the method of transporting the items of an order. Carrier types include *tote, super tote, puck,* etc.

Cradle – a desktop repository for placing totes to be read by the RFID reader.

Divorce – the splitting of a carrier to a patient order or multiple patient orders for super totes.

Exception types – an ***exception*** occurs when there is a problem encountered when filling a prescription order. The types of exceptions include:

- **Process Exceptions** result from an order not being filled, picked, or labeled correctly. Selecting the appropriate item or order-level functions can correct the problem.
- **Data Exceptions** occur when the original order data is incorrect, which now requires modification before reprocessing. Modification is done on the host system and communicated to the Sanitas Pharmacy Management system through an interface.
- **Order Exceptions** can be directed to the Exceptions processing area from other order/process related applications within the Sanitas Pharmacy Management system.

Item – the delivery mechanism of a prescription. An item can be a vial, tube, box, syringe, etc.

Lot – an identification number assigned to a particular quantity or lot of material from a single manufacturer. Lot numbers can typically be found on the outside of packaging.

Manufacturer – The company that is manufacturing the medication.

Marriage – the joining of a carrier to a patient order or multiple patient orders for super totes.

Order – a single patient order that contains one or more prescription(s).

Package – a completed order, including any associated paperwork, which is ready to be shipped. Also, the quantity of medication within the container as received from the manufacturer.

Prescription/Rx – the medication prescribed to the patient and may contain one or more item(s).

Puck – a type of carrier that can hold one vial.

Shelf – The physical storage location of inventory within an area of a pharmacy.

Slot – The assignment of a specific drug, manufacturer and package size to a shelf.

Super Tote – similar to a tote, a super tote is a type of carrier that is assigned multiple single-item orders (more than one prescription per patient will be in a super tote).

Tote – a type of carrier that can hold multiple items for one order and is moved along the conveyance system.

Index