ArbiMed User Manual

Revision 2

What Do You Want to Do?

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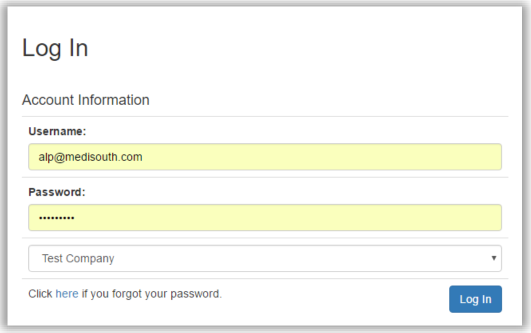
Set Up

Basics

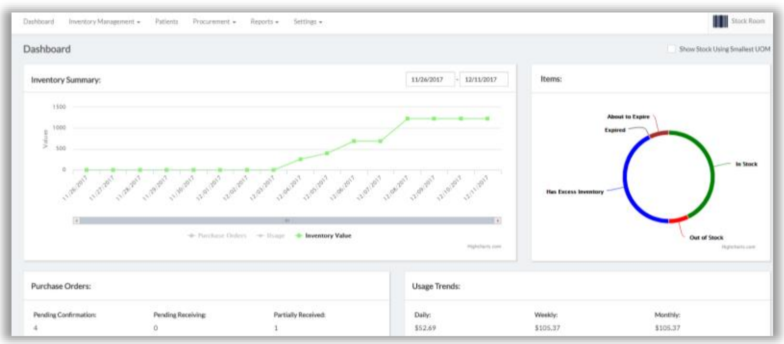
Log In to ArbiMed

1. Go to https://app.arbimed.com, enter your Username and Password, and click **Log In**

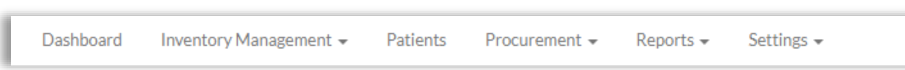


- If you have two different accounts with the same username and password, a drop down list will appear. Select the account you wish to use.

2. Dashboard page will appear



Notice the Top Menu, which lists different modules you can access in ArbiMed



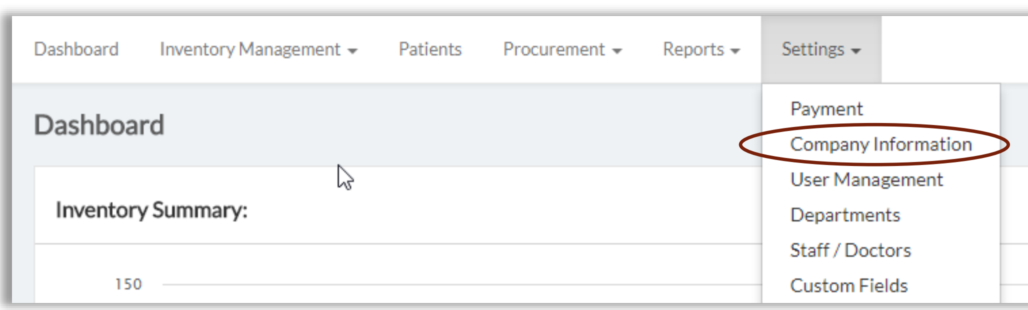
Dashboard

The ArbiMed Dashboard provides important information, including:

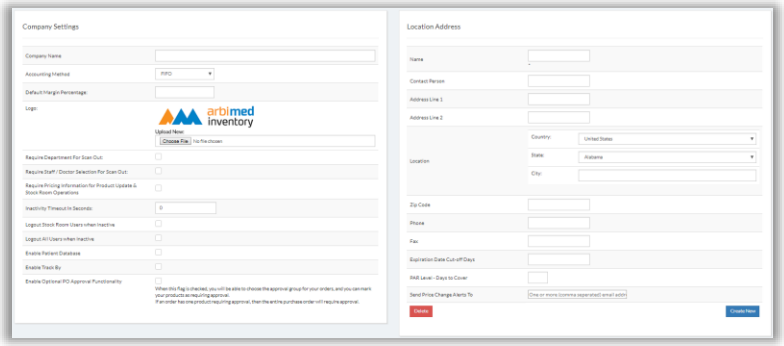
- Inventory Summary – Daily inventory value, purchase orders, and item usage
- Purchase Predictions – System suggests what you may need to order
    a. Click button **Click to Review**
    b. Select Supplier. Products will be displayed as follows:
        - White rows need to be ordered
        - Grey rows do not
        - Red rows need more information
- Purchase Orders – Shows different order categories, including those requiring your approval
- Inventory Values – Up to the minute, broken down by supplier
- Expiring Products:
    - Expiring Stock column shows:
        - Red box – Is Expired
        - Orange box – Will expire in 60 days

Set Company Information

1. Go to Top Menu and click **Settings**, then **Company Information**



Company Information screen appears

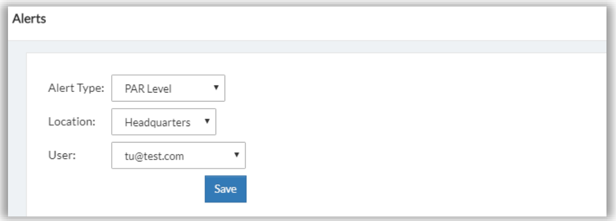


2. Go to left and complete fields:
   - Company Name
   - Accounting Method – Select FIFO or LIFO
   - Default Margin Percentage – Sets default retail price for all items (e.g. DMP of 1.15 gives a 15% profit margin)
   - Inactivity Logout
   - Require Customer Names For Prescripted Items – makes name required if product requires prescription
   - Require Department For Scan Out
   - Require Staff / Doctor Selection For Scan Outs
   - Require Pricing Information for Product Update & Stock Room Operations – Recommended leave this unchecked during Setup; you can activate it later after setting all product prices
   - Inactivity Timeout In Seconds
   - Logout Stock Room Users when inactive
   - Logout All Users when inactive
   - Enable Patient Database – creates a list of patients so you can see their transaction history and easily scan items out to them

     **After checking this box you need to logout and log back in
   - Enable Track By – when you receive ordered items – allows you to serialize items received from purchase order, and to print unique barcodes for them. You will select the unit of measure to track during order receiving (see *Receive Orders*)
   - Enable Optional PO Approval Functionality – allows you to:
     - require purchase order approval from users you specify (see *Create Users*)
     - require certain products to be approved when being ordered

Important: If a purchase order has one product requiring approval, then the entire order will require approval

3. Email & Alert Settings: Lets you specify emails to receive various system alerts
    a. Click Email & Alert Settings
    b. Popup appears



    c. Set Alert Type, Location, and User
    d. Click **Save**

4. Location Address: The physical address where you will store and dispense inventory. When you first log in to ArbiMed, the default Location is "Headquarters". Complete the fields as needed, and note the following:
    - Expiration Date Cut-off Days – Number of days before expiration that alerts begin on PAR Levels Report (see PAR Levels Report)
    - PAR Level - Days to Cover: Number of business days' worth of adequate stock (according to PAR Levels) that you want to maintain – Set as appropriate for your office

      (For more information on PAR Levels, see Manually Create a New Product / Stage 2: Set Advanced Details / Item 2 PAR Level)
    - Send Price Change Alerts To – Email address for staffer to be informed of price changes made to products (see Edit Manually Created Products)

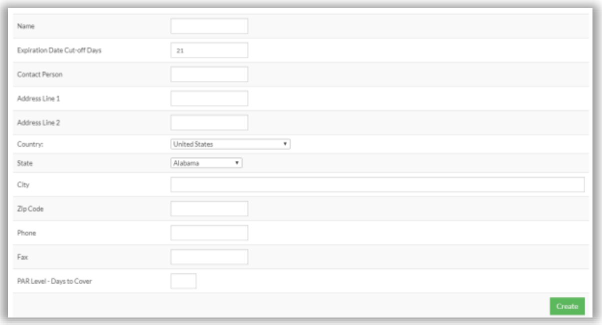
5. Click **Save Changes**

Create Additional Location

You can also create additional locations:

1. Go to Top Menu and click **Settings**, then **Company Information**
2. Scroll down, go to lower right and click **Create New**

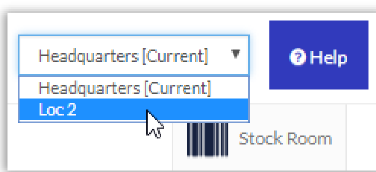
   Create New Location popup appears



3. Complete fields as needed, then click **Create**

4. Close popup, then go to upper right and click the Location Selection Menu (next to Help button)

   Your new location is now an option:



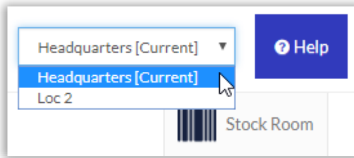
5. Select the new location, and begin building its Inventory List (see *Create Products*. This will allow you to conduct transactions (Receive, Dispense, Transfer etc.) for the location.

Create Users

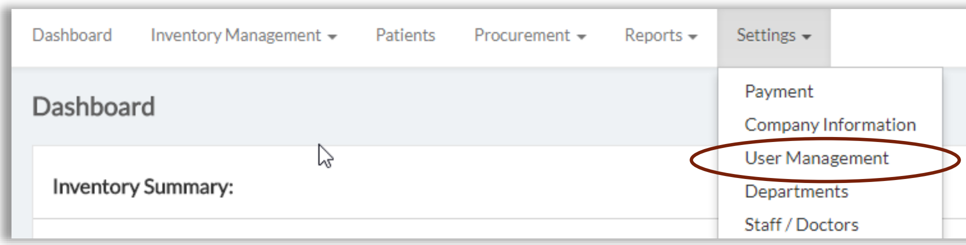
You can create system users and define their system privileges

Create Basic User Profile

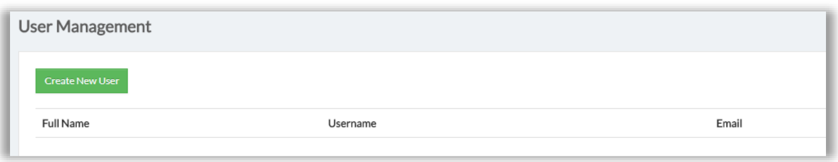
1. Go to the upper right and use the drop-down menu to select the physical address where the user will exist



2. Go to Top Menu, click **Settings**, then **User Management**

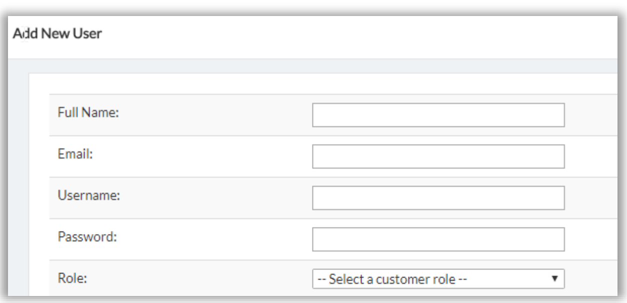


User Management page appears



3. Click **Create New User**

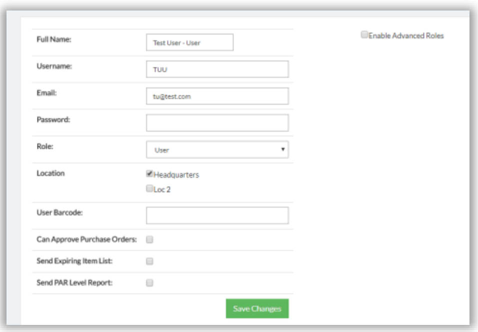
Add New User popup appears



4. Complete fields as desired. Note the following:
    - Email – to recover a password
    - Username and Password can be anything you choose
    - Role – Select as appropriate:
        - User – can access all system functions, but cannot change company, product, or system settings
        - Customer Admin – can view and edit all information in the system
        - Stock Room – can only access Dashboard and Stock Room. On Stock Room can only scan items in and out

5. Click **Create**

   Edit User popup appears



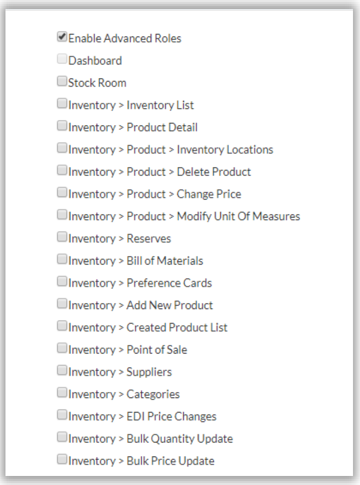
Define User Privileges

On Edit User popup (see previous) you can give additional privileges to users defined as "User" and "Stock Room"

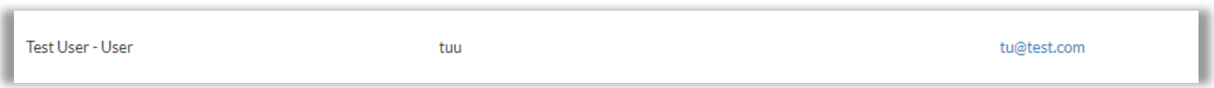
1. If desired, change or select:
    a. Location (physical business address)
    b. Can Approve Purchase Orders
    c. Send Expiring Item List
    d. Send PAR Level Report

2. Go to upper right and check Enable Advanced Roles

System module list appears



3. Check the modules you want this user to access
4. Click **Save Changes**
   System gives Success message
5. Close popup, and User Management screen will show new user



6. To modify user, click **Edit**.
   To delete user, click **Delete**

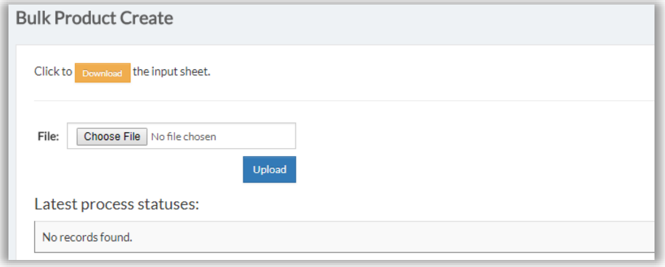
Create Products

To purchase and dispense products, you first need to create your product database, also called the Inventory List. You will do this by creating products in one of three basic ways:

- Bulk Upload
- Add from ArbiMed catalog
- Manually Create a New Product

Create a Product Using Bulk Upload

1. Go to Top Menu, click **Inventory Management,** then **Bulk Product Creation**
   Bulk Product Create screen appears



2. Click **Download** to obtain the ArbiMed standardized Input Sheet

3. Go to your computer and open the Input Sheet
   Note explanatory row:

Add To Other Locations	Supplier Name	Category	Description
Y or N. Required	Supplier name or empty	Category or empty	Product description.

4. Complete Input Sheet:
   __**Important:**__ Do not change sheet format
   a. Populate fields (required fields marked in red)
   b. Provide UPC code. If not, system will create one at upload
   c. Indicate desired Unit of Measure and pricing
      For example, to create a Case of 10 Boxes, where each Box costs $14 and contains two actual units of the product (called "Each"), you would complete the sheet as follows:

Unit Of Measure	Is Purchasing Package	Package Price	Sub Unit Of Measure	Sub Unit Of Measure Quantity
Case	N		Box	10
Box	Y	14	Each	2
Each	N			

   - Box is purchasing package, so <u>Is Purchasing Package</u> is "Y" and <u>Package Price</u> is "14"
   - Box has "Each" as Sub Unit of Measure, and Sub Unit of Measure Quantity is "2"
   - "Each" is the smallest possible package, so it has no Sub Unit of Measure or Quantity

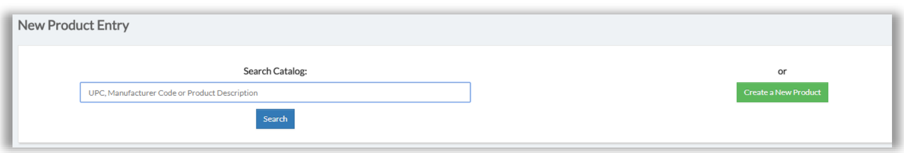
5. Upload Input Sheet:
    a. Click **Choose File**
       Pop-up will appear displaying files on your computer
    b. Locate the input sheet, highlight it with your mouse, then press Enter on your keyboard
       File name will appear in File Upload box.
    c. Click **Upload**
       System may require up to 15 minutes to process
        - Product(s) can now be viewed in Inventory List, with zero units. To add units, it is recommended you create purchase orders and then scan them in from the orders (see Create Orders and Receive Orders)
        - To access Inventory List, go to Top Menu, click **Inventory Management**, then select **Inventory List**

Add Product from ArbiMed Catalog

You can search the ArbiMed catalog to add products with preset details

Important: Some details for products added this way cannot be changed later
For this reason it is recommended you Manually Create a New Product

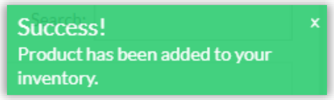
1. Go to Top Menu, click **Inventory Management,** then **Create New Product**
   New Product Entry screen appears



2. Click in Search Catalog box and provide UPC, Manufacturer Code, or Product Description; then click **Search**
   System displays matching item(s)

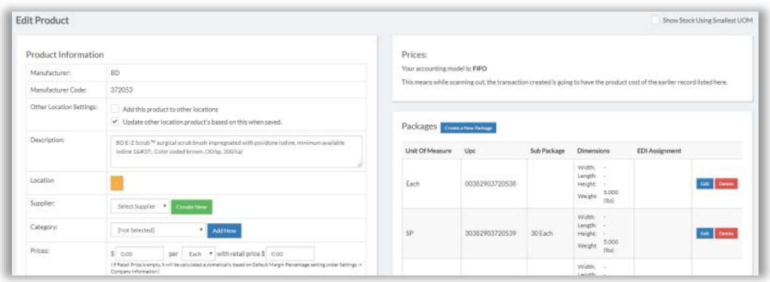
3. Click **Add to My Inventory**

   System gives Success message



4. Go to Top Menu, click **Inventory Management**, then **Inventory List**
5. Locate the product, and click 

   Edit Product screen appears



6. Set fields as needed. (Please see below: Manually Create a New Product/ Stage 2: Set Advanced Details

   Important: Prices will be 0 by default. Set as desired

Manually Create a New Product

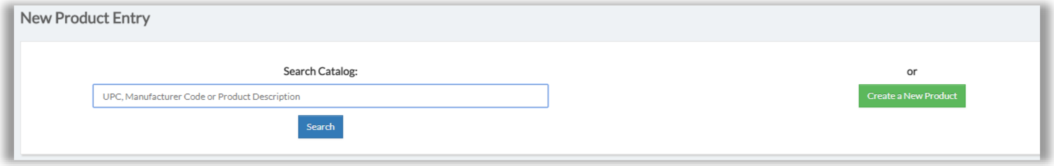
This process has two stages:

Stage 1: Set Basic Details
Stage 2: Set Advanced Details

Stage 1: Set Basic Details

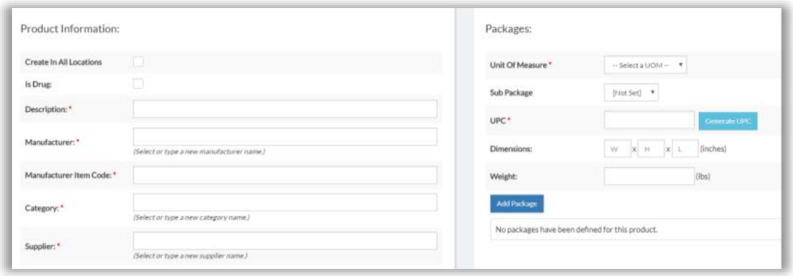
1. Go to Top Menu, click **Inventory Management**, then **Create New Product**

   New Product Entry screen appears



2. Click **Create a New Product**

   First Screen appears

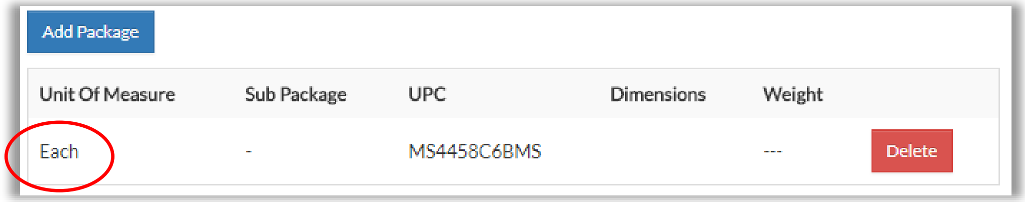


3. Go to the left and complete fields. Required fields have a red asterisk (*)

4. Rename <u>Shelf Location</u>
   - Shelves and lots are used to store inventory. Shelves are the parent storage element and can have Lots as a subcategory
   - When you create a product, system dispenses a default shelf name of "-," but it is recommended you rename it to something more useful
   - <u>Note</u>: Elsewhere, the term "Location" refers to the physical business address where you are receiving and dispensing inventory (see *<u>Set Company Information</u>*)

5. Define packages
   a. First, define the <u>smallest</u> package
      i. <u>Unit of Measure</u> – Select as desired (for example, "Each")
      ii. <u>UPC</u> – Scan / type in, or click **Generate Barcode**
      iii. <u>Dimensions</u> and <u>Weight</u> (Optional)
      iv. Click **Add Package**

System shows new package

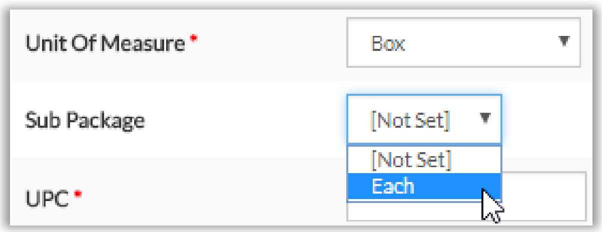


b. Then, define the <u>next largest</u> package

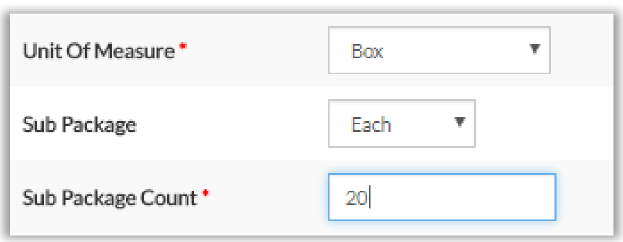
For example, if the smallest package is Each, the next level could be Box, which would contain the "Eaches"

i. <u>Unit of Measure</u> – Select as desired

ii. Select <u>Sub Package</u> (recommended)



iii. If you set Sub Package, also set <u>Sub Package Count</u> (required)

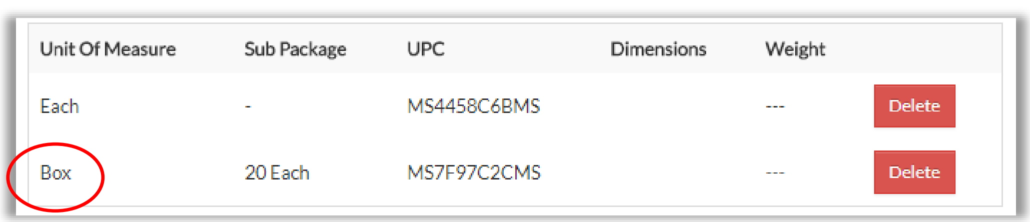


iv. <u>UPC</u> – Scan / type in, or click **Generate Barcode**

v. <u>Dimensions</u> and <u>Weight</u> (Optional)

vi. Click **Add Package**

System shows new package



c. Finally, if desired, you can create another level of package (for example, "Case") to make a common package hierarchy of Each-Box-Case, as so:

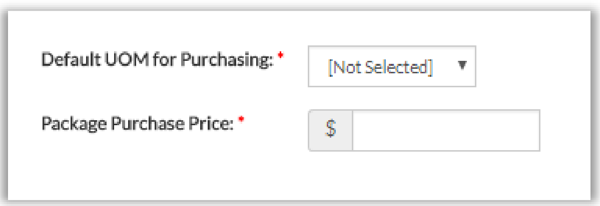
Unit Of Measure	Sub Package	UPC
Each	-	MS4458C6BMS
Box	20 Each	MS7F97C2CMS
Case	16 Box	MS005EA67MS

d. If you wish to delete a package, click **Delete**. Note that:

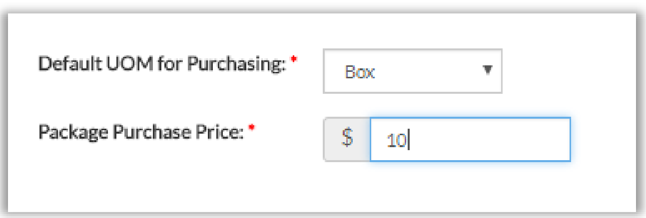
- If you delete a package that is a sub unit of a greater package, you will delete that greater package as well
- If you delete the smallest package in a hierarchy, you will delete the entire hierarchy as well. For instance, in the graphic above, if you delete Each, you will delete Box and Case as well.

6. Set pricing for the main purchasing package

a. Go to lower right to pricing fields:

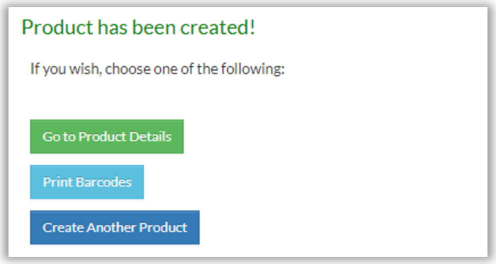


b. Set Default UOM for Purchasing and Package Purchase Price

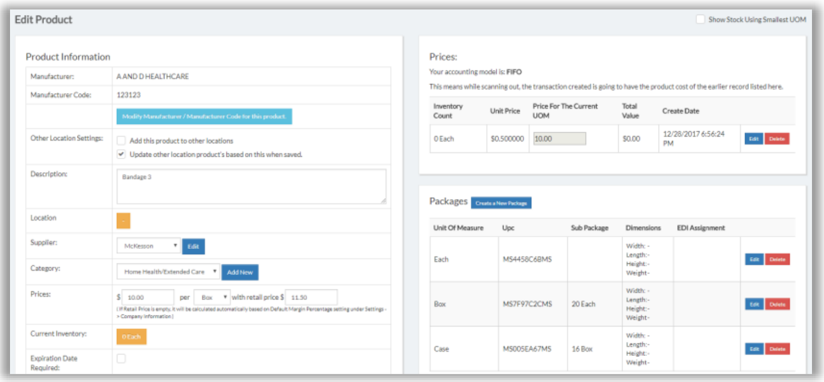


7. Click **Create Product**

System gives Success message



8. Click **Go to Product Details**
   Edit Product Screen appears



Stage 2: Set Advanced Details

1. Complete fields. Note in particular:
   - Other Location Settings – Refers to physical addresses where you will store and manage inventory. Check the boxes (recommended):
     - Add this product to other locations
       - If other locations are to store this product, the product name must be associated with ("added to") those locations
       - Checking this box will "add" the product name to those locations
       - Product will have no units, until units are transferred in (see Other Functions) or received from orders (see Receive Orders)
     - Update other location product's based on this when saved – propagates any changes made on this page to this product's record at the other addresses
   - Location – Refers to shelves and lots. Click orange box, then create new shelves/lots as desired
   - Retail Price – Confirm this is correct

- Is Dose – Check box if your system build supports Dose Tracking, and you want to activate it for this product

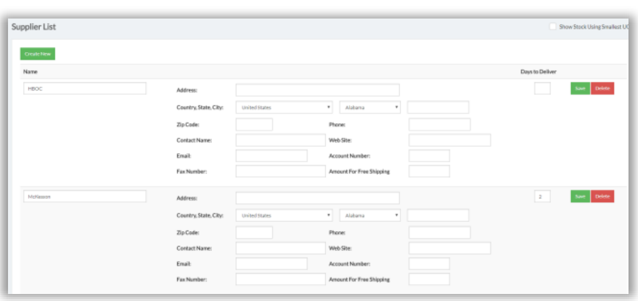
  Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

- Product Prefix – Required if you checked Is Dose. Used to create dose numbers
- Approved ICD Codes for Billing – Required if you checked Is Dose. Provide as needed. Use base codes with no modifiers. Or type All
- Usage Warning Days (recommended) – Gives alert if you try to assign item twice to patient within this period
- Requires PO Approval – Check this to require Purchase Order approval when item is on the order

  Important: Even if you check this box, Sample / Specialty / Replacement orders with this item will not require approval, because those order types do not have prices (see *Create Orders*)

- Required For Scan Out – Checked fields will be required to be populated on Stock Room when scanning out this product

2. PAR Level – These settings help the system track product usage and generate purchase reminders (see Dashboard Overview)
   - Exclude from PAR Level – product won't be managed by PAR Levels
   - Minimum Stock Level – if greater than estimated future usage, will be PAR Levels Report ("PLR") Suggested Purchase Quantity
   - Maximum Stock Level – if less than estimated future usage, will be PLR Suggested Purchase Quantity
   - Minimum Purchase Quantity – ensures PLR purchase suggestions are correct
   - Number of Days for Receiving – default is 0. To change, click the link **Click here to change**
     a. New browser tab appears



     b. Locate supplier, then set Days to Order to desired number
     c. Click **Save** for that supplier, then close the tab

d. Screen refreshes and shows new Number of Days for Receiving

3. When finished, click **Update Product**

   Product can now be viewed in Inventory List, with zero units

   To add units, it is recommend you Receive them from a Purchase Order (see Receive Orders)

4. At this point you can also print product barcodes (see below: Print Barcodes for Non-Dose Items)

Edit Manually Created Products

If you wish can edit your manually created products

Two simple ways are from the Inventory List, or from the Created Products List (for other methods, see Update Product Details)

From Inventory List:

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Find your product and click 
3. Edit product as needed, then click **Update Product**

From Created Products List:

1. Go to Top Menu, click **Inventory Management**, then **Created Products**
2. Find product and click **Edit**
3. Edit product as needed, then click **Update Product**

Print Barcodes for Non-Dose Items

If you wish you can print product barcodes

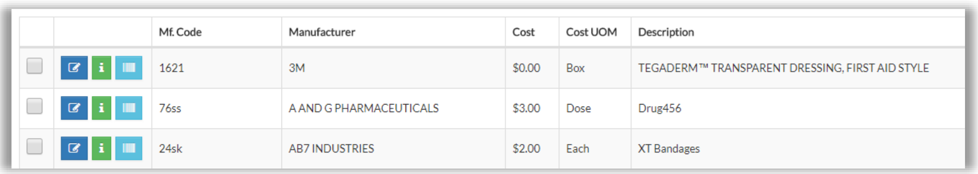
There are two main methods: One product at a time, or multiple products at once

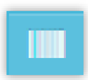
Note: This process is for Non-Dose Items. To print barcodes for Doses, see *[Print Barcodes for Doses]*

Print One Product

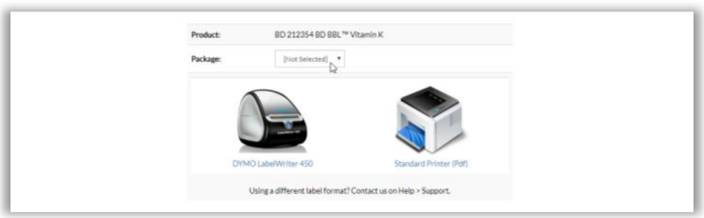
1. Go to Top Menu, click **Inventory Management**, then **Inventory List**

   Inventory List screen appears



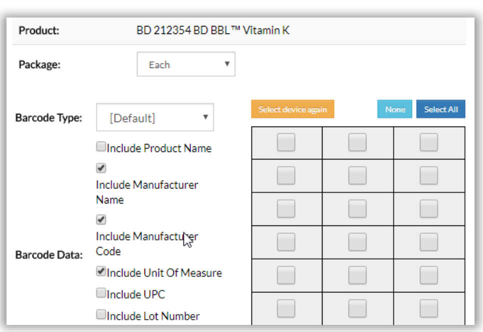
2. Find product, then click 

   Print Barcode popup appears

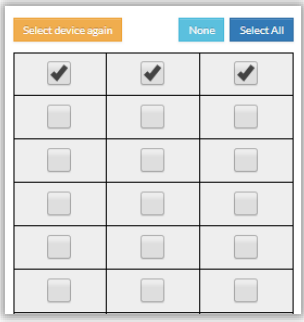


3. Set <u>Package</u>, and click **Standard Printer (Pdf)**

   Barcode formatting popup appears



4. On the right is the print grid. Click each space you want filled
   For instance, if you click:



The print sheet will look like:

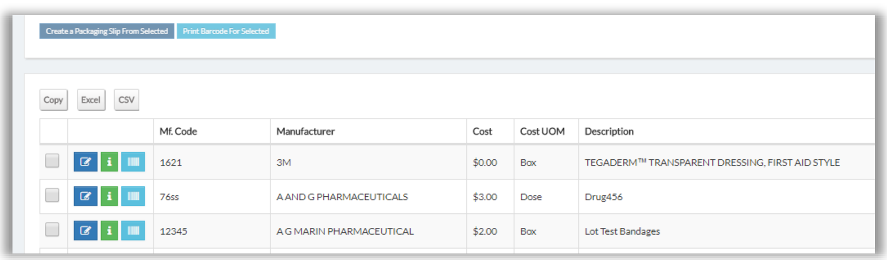
5. Set the other fields as you wish

6. Scroll down and click **Print**
   System will download barcode sheet to your computer

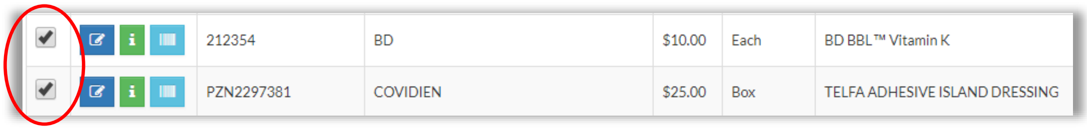
7. Print sheet

Print Multiple Products

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
   Inventory List appears



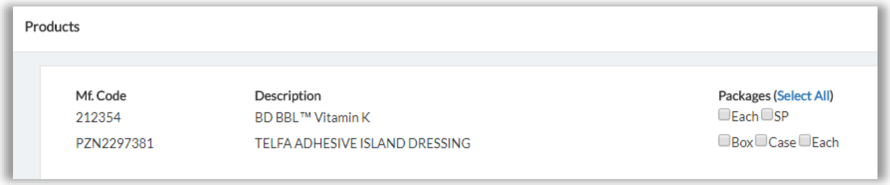
2. Check the boxes for the products to print



212354	BD	$10.00	Each	BD BBL™ Vitamin K
PZN2297381	COVIDIEN	$25.00	Box	TELFA ADHESIVE ISLAND DRESSING

3. Go up and click **Print Barcode for Selected**

   Select packages popup appears



4. Check the packages you want to print

   System will produce one barcode for each selected product-package combination

   In this example:

Vitamin K	Each
Telfa Dressing	Box
Telfa Dressing	Case

5. Click **Next**

   Barcode sheet will open in new browser tab

6. Print sheet

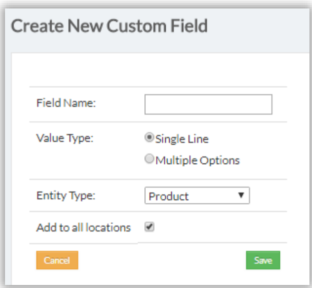
Create Other Elements

Create Custom Fields

You can add custom fields for products and use them for reporting and searching

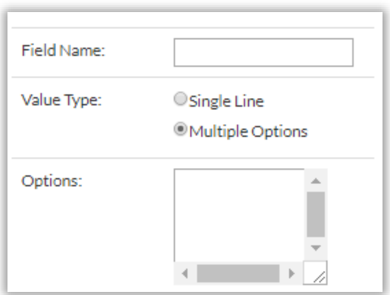
1. Go to Top Menu, click **Settings**, and select **Custom Fields**
2. Click **Add New**

   Create New Custom Field screen appears



3. If you want field to have multiple options to choose from, set Value Type to "Multiple Options"

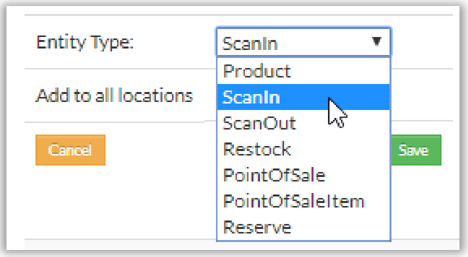
   Screen refreshes and show:



   a. Click in box with scroll arrows and type field options, each one on a new line. For example:

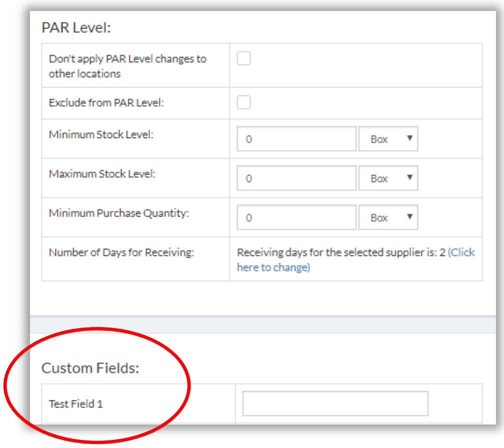
After the field is created, the system will display these options as a drop down menu:

4. Set Entity Type to determine which system screens display the field

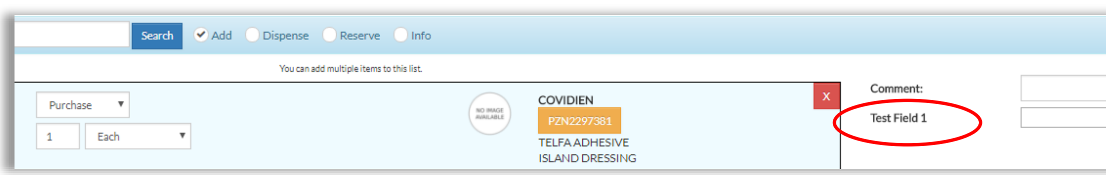


For example:

- If you set Entity Type to "Product," the field will appear on the Edit Product screen, at the bottom left:



- If you set Entity Type to "Scan In," the field will appear on the Stock Room page on the right, when you scan an item to Add:



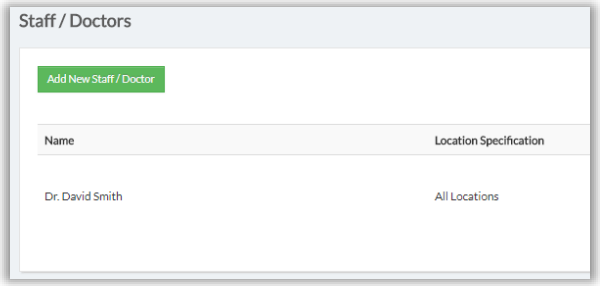
5. Click **Save**

Create Doctor or Staff Member

Doctors or Staff can be created and then linked to various functions, such as item dispensing (see Scan Out Items)

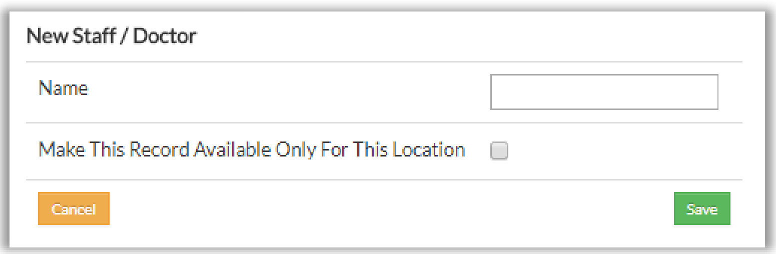
1. Go to Top Menu, click **Settings**, then **Staff/Doctors**

   Staff/Doctors screen appears



2. Click **Add New Staff/Doctor**

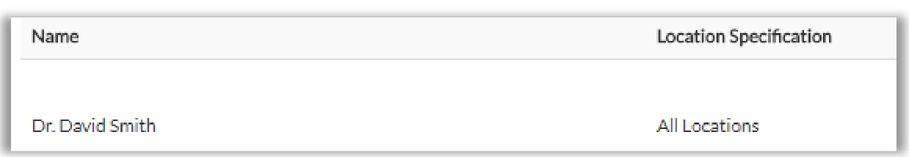
   New Staff/Doctor fields appear



3. Provide Name
   - If desired check Make This Record Available Only for This Location

4. Click **Save**

   System shows new staff/doctor



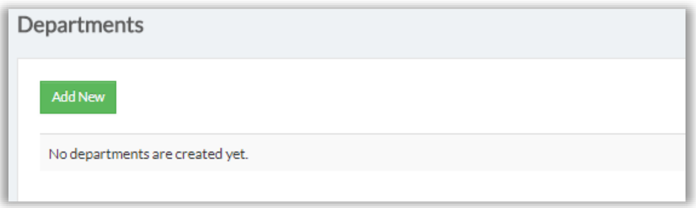
5. To edit staff/doctor, click **Edit**,

   To delete staff/doctor, click **Delete From This Location**, or **Delete From All Locations**

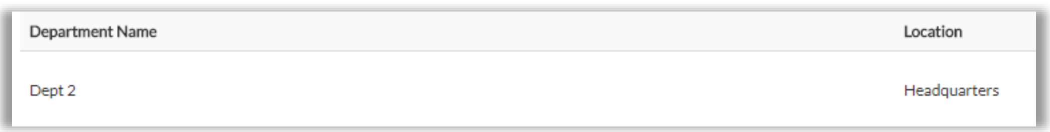
Create Departments

Create a department to use in scanning items and reporting

1. Go to Top Menu, click **Settings**, then select **Department**
   Departments screen appears



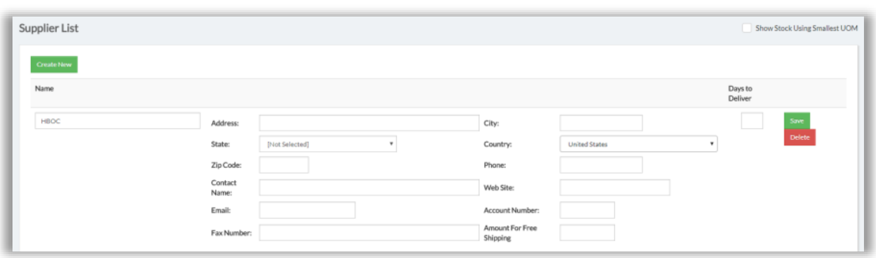
2. Click **Add New**, complete fields, then click **Save**
   Department screen appears and shows new department



3. To edit department, click **Edit**
   To delete department, click **Delete**

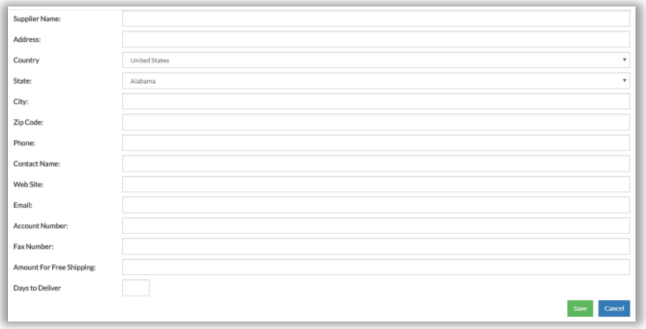
Create Suppliers

1. Go to Top Menu, click **Inventory Management,** then **Suppliers**
   Supplier List screen appears



2. Click **Create New**

Popup appears



3. Type Supplier Name

4. Input other fields as desired

5. Click **Save**

Create Categories

1. Go to Top Menu, click **Inventory Management**, then **Categories**
   Categories screen appears

2. Click in text box and enter desired category name, then click **Add**
   Screen refreshes and shows new category

Create Patients

If you want to track patient item usage and other information, you will need to create those patients here.

In addition, if your system build supports dose tracking, and you want to use Specialty Orders to order doses for certain patients, then to dispense those doses you will need to create the patients here and assign those drugs to them.

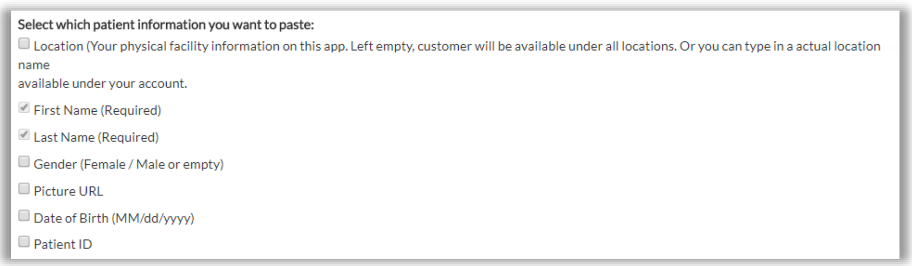
Only dosed drugs can be assigned; non-dose items cannot be assigned

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Create Patients in Bulk

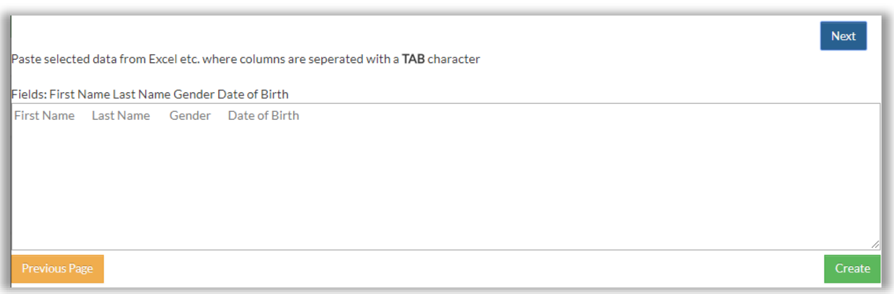
1. Go to Top Menu and click **Patients**
2. Click **Create Patients in Bulk**

   Popup appears



3. Check desired fields, then click **Next**

   Input box appears



   a. Copy data from Excel and paste into a text (.txt) file
   b. Then copy contents of text file and paste into box here

Data will be automatically tab-delimited

4. Click **Create**

   System gives Success message, and popup closes

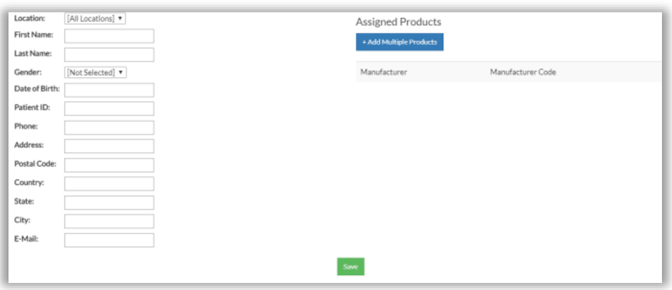
5. To view patient, populate Search field and click Search

Create Individual Patient

1. Go to Top Menu and click **Patients**

2. Click **+New Patient**

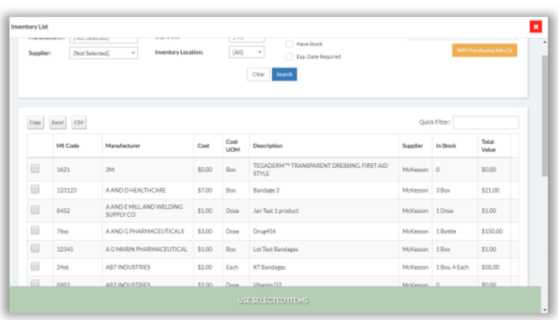
   Popup appears



3. Complete left-hand fields as needed, then click **Save**

4. Go to right and click **+Add Multiple Products**

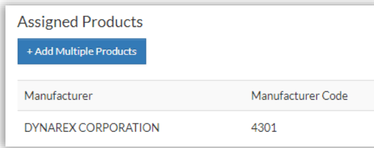
   Popup appears



5. Use search fields or scroll down to find desired product(s)

6. Click check box for the product(s), then click **Use Selected Items**

   System shows product(s) as added



7. Click **Save**

Create Orders, Scan In Items, or Scan Out Items

Create Orders

ArbiMed allows you to create four types of product Orders:

- Purchase Orders – may require approval
- Sample Orders – for free samples
- Specialty Orders – for items that seller will bill to patient insurance
- Replacement Orders – for free items to replace current ones

Important:

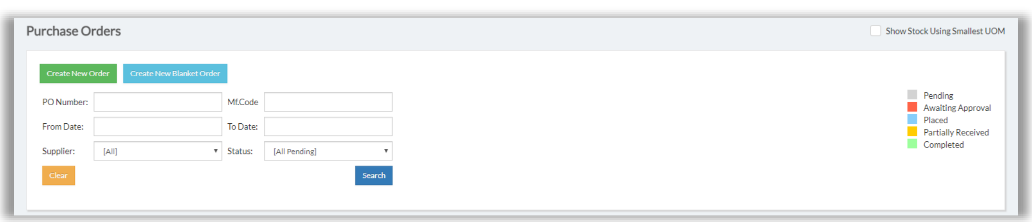
- Only Purchase Orders have prices and will require approval if they include products that require approval (see *Manually Create a New Product* / Stage 2: Set Advanced Details / Requires PO Approval)
- In contrast, Sample, Specialty and Replacement orders are free and never require approval, even if they include such products

Create Purchase Orders

Set Up Order

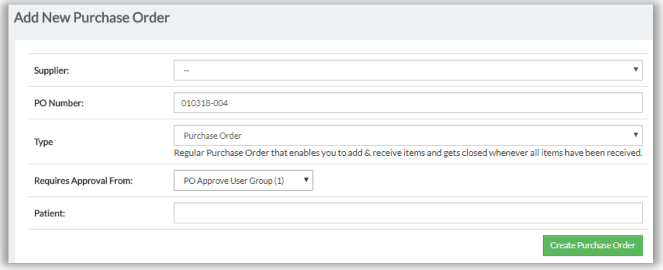
1. Go to Top Menu and click **Procurement**, then **Purchase Orders**

   Purchase Order screen appears



2. Click **Create New Order**

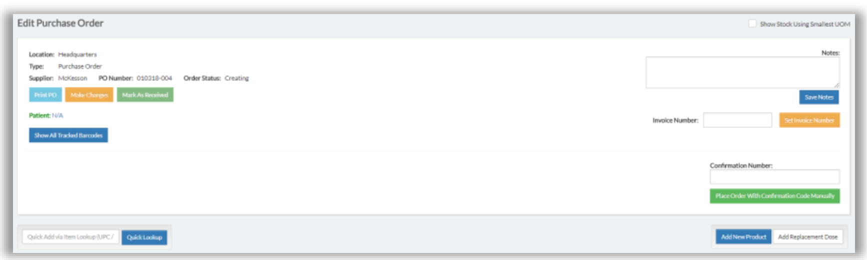
   Add New Purchase Order screen appears



3. Complete fields:
   - <u>Supplier</u> – required
   - <u>PO Number</u> – system-generated, but you can change it
   - <u>Type</u> – Leave as "Purchase Order"
   - <u>Requires Approval From</u> – provide name of Approver (see *Create Users*)

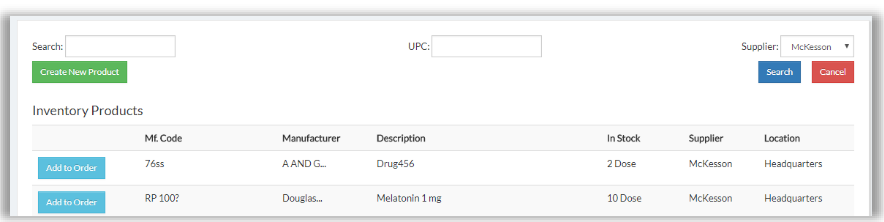
4. Click **Create Purchase Order**

   Edit Purchase Order screen appears



5. Go to lower right and click **Add New Product**

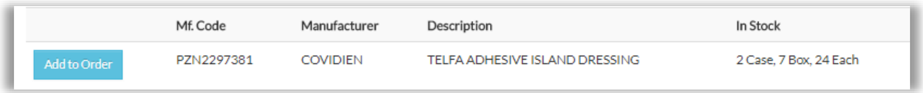
   Popup appears



6. Click in <u>Search</u> box, type product name, and press Enter;

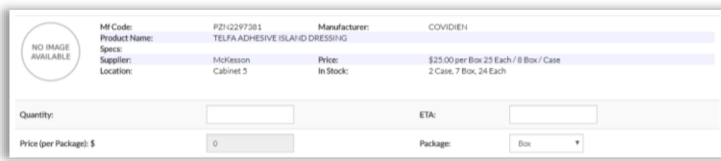
   Or, click in UPC box and scan UPC

System shows search result



7. Click **Add to Order**

   System shows product details



8. Enter <u>Quantity</u> (required) and set other fields as desired, then click **Add to Order**

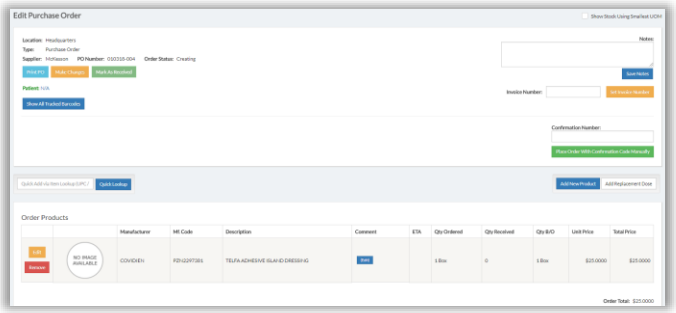
<u>Changing Prices:</u>

If you change <u>Price (per Package)</u> and click **Add to Order**, system will ask if you are sure

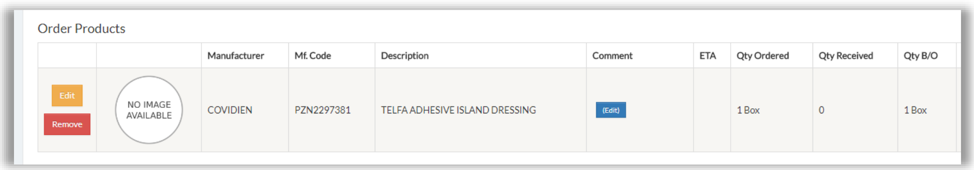
- If you click **Ok**, this will be the new price for the item for all transactions going forward
  - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
  - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
  - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
  - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears



Screen shows your product at the bottom



2. If you wish:
   - Click **Edit** to set product ETA, or to change quantity, package or price
   - Click **Remove** to remove a product
   - Add other products, or search other suppliers
   - Type Notes (optional) and click **Save Notes**
   - Type Invoice Number (suggested) and click **Set Invoice Number**

3. Next:

   If order does not require approval:

   a. Provide Confirmation Number (suggested)

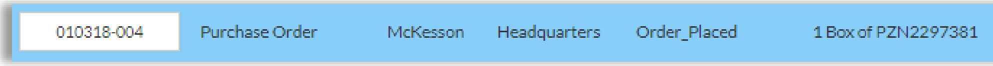
   b. Click button **Place Order With Confirmation Code Manually**, then **Ok**

   c. Screen refreshes, and button you clicked is now faded

   **This confirms order has been created

   d. If you wish:
      - Click **Send Fax** to fax a copy of the order
      - Click **Print PO** to print the order, which you can use for Receiving (see *Receive Orders*)

e. If you go to Purchase Orders screen, you will see order listed



<u>Or, if order requires approval:</u>

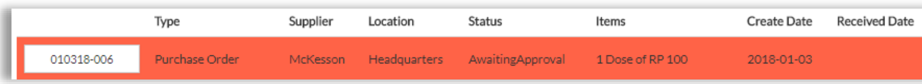
a. Provide <u>Confirmation Number</u> (suggested)

b. Click the button **Send PO to [x] for approval**, where [x] is the approving person or group you chose when you set up this order (see <u>*Set Up Order*</u>)

c. Screen refreshes, and button will be replaced by message:
"Awaiting approval from [x]"

d. Order will not be created until approval received (see <u>*Approve Orders*</u>)

e. If you go to Purchase Orders screen, you will see this order in red:



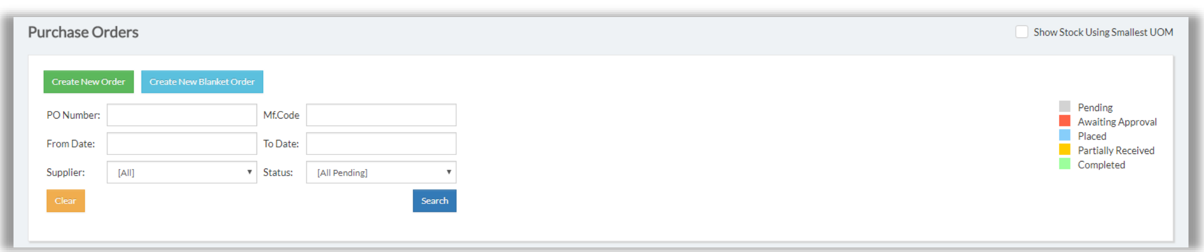
<u>Status</u> is "Awaiting Approval"

Create Sample Orders

You can use a Sample Order to order free samples

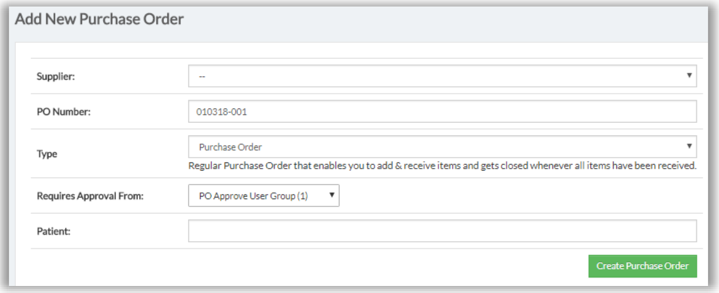
<u>Set Up Order</u>

1. Go to Top Menu and click **Procurement**, then **Purchase Orders**
Purchase Order screen appears



2. Click **Create New Order**

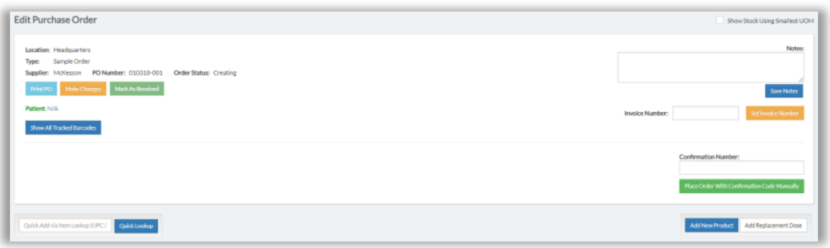
Add New Purchase Order screen appears



3. Complete fields
    - <u>Supplier</u> – required
    - <u>PO Number</u> – system-generated, but you can change it
    - <u>Type</u> – Set as "Sample Order"
    - <u>Patient</u> (optional)

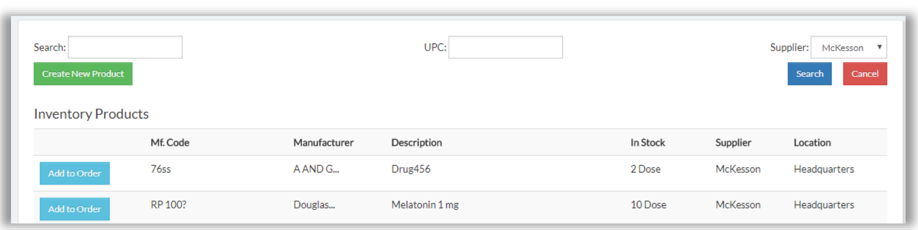
4. Click **Create Purchase Order**

   Edit Purchase Order screen appears



5. Go to lower right and click **Add New Product**

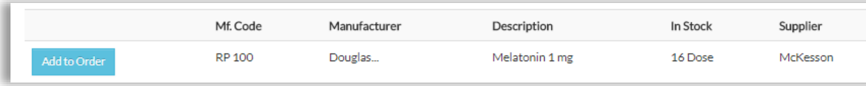
   Popup appears



6. Click in <u>Search</u> box, type product name, and press Enter;

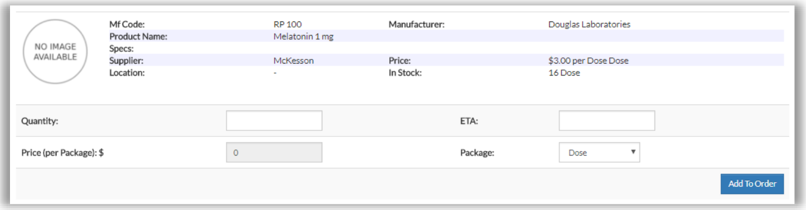
   Or, click in UPC box and scan UPC

System shows search result



7. Click **Add to Order**

   System shows product details



8. Enter <u>Quantity</u> (required) and set other fields as desired, then click **Add to Order**

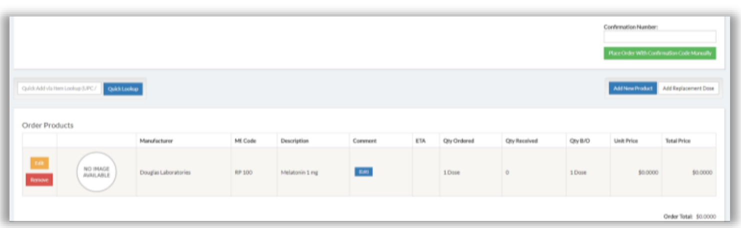
<u>Changing Prices:</u>

If you change <u>Price (per Package)</u> and click **Add to Order**, system will ask if you are sure

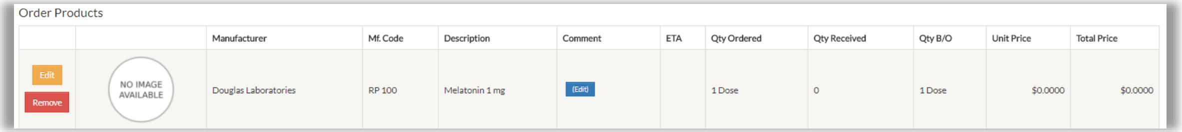
- If you click **Ok**, this will be the new price for the item for all transactions going forward
    - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
    - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
    - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
    - Go to Finalize Order (below)

<u>Finalize Order</u>

1. Edit Purchase Order Screen appears



Product you chose is at bottom:



Order Total is $0, since this is not a Purchase Order

2. If you wish:
    - Click **Edit** to set product ETA, or to change quantity, package or price
    - Click **Remove** to remove a product
    - Add other products, or search other suppliers
    - Type Notes (optional) and click **Save Notes**
    - Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**

   Screen refreshes, and button is now faded

   This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see *Receive Orders*)

Create Specialty Order

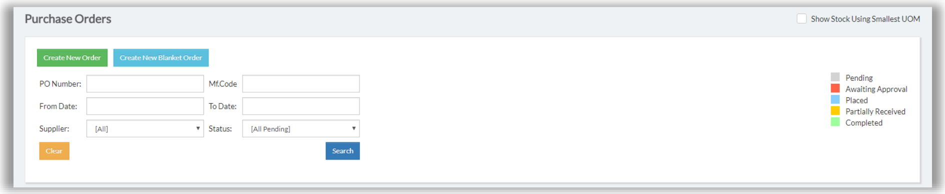
You can create an order for special items as needed for a particular patient

These items are billed to patient insurance, and so will not incur charges

Set Up Orders

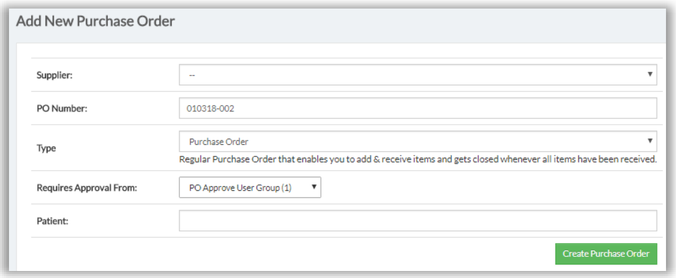
1. Go to Top Menu and click **Procurement**, then **Purchase Orders**

   Purchase Order screen appears

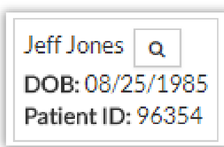


2. Click **Create New Order**

   Add New Purchase Order screen appears



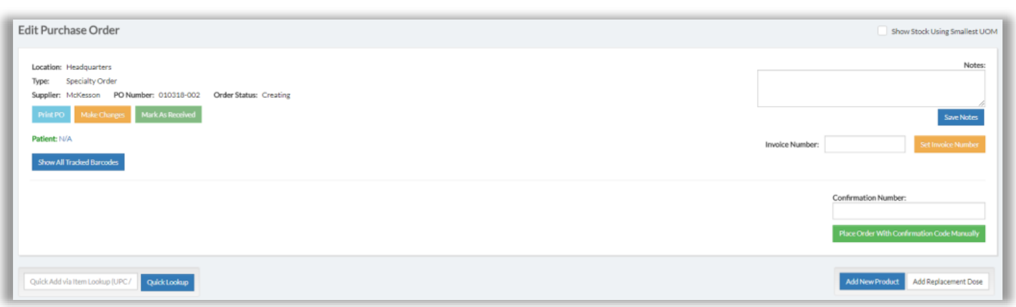
3. Complete fields
   - <u>Supplier</u> – required
   - <u>PO Number</u> – system-generated, but you can change it
   - <u>Type</u> – Set to "Specialty Order"
   - <u>Patient</u> – **Required**
     a. Provide name or ID number of Patient to receive this item
     b. System provides name box



     c. Click name box to select patient

4. Click **Create Purchase Order**

   Edit Purchase Order screen appears

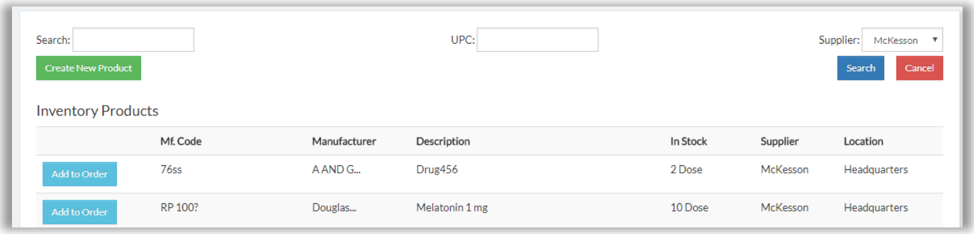


a. Go to Notes field and type as needed

b. Click **Save Notes**

5. Go to lower right and click **Add New Product**

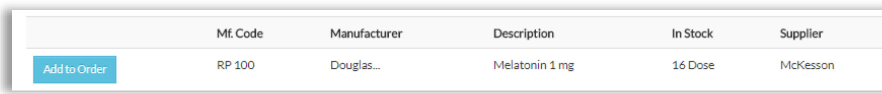
   Popup appears



6. Click in Search box, type product name, and press Enter;

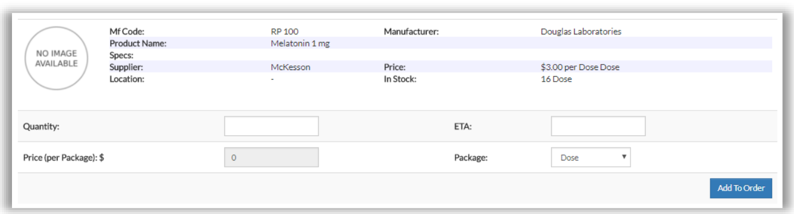
   Or, click in UPC box and scan UPC

   System shows search result



7. Confirm, then click **Add to Order**

   System shows product details



8. Enter Quantity (required) and set other fields as desired, then click **Add to Order**

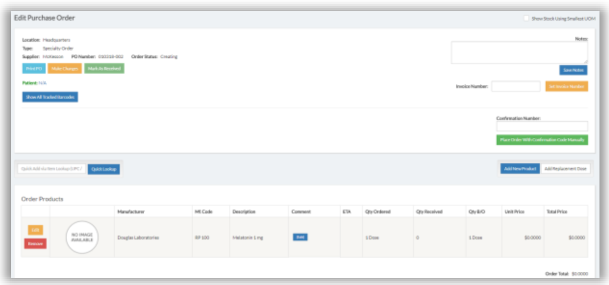
Changing Prices:

If you change Price (per Package) and click **Add to Order**, system will ask if you are sure

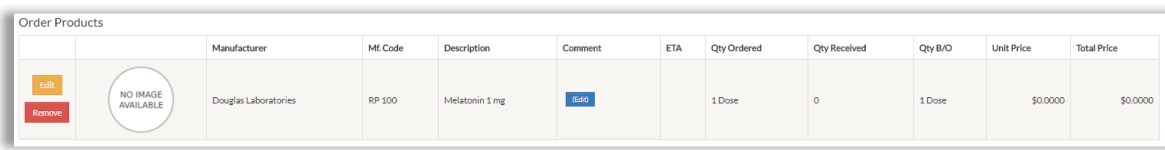
- If you click **Ok**, this will be the new price for the item for all transactions going forward
  - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
  - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
  - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
  - Go to Finalize Order (below)

Finalize Order

1. Edit Purchase Order Screen appears



Product you chose is at bottom:



Order Total is $0, since this is not a Purchase Order

2. If you wish:
   - Click **Edit** to set product ETA, or to change quantity, package or price
   - Click **Remove** to remove a product
   - Add other products, or search other suppliers
   - Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**

   Screen refreshes, and button is now faded

This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see Receive Orders)

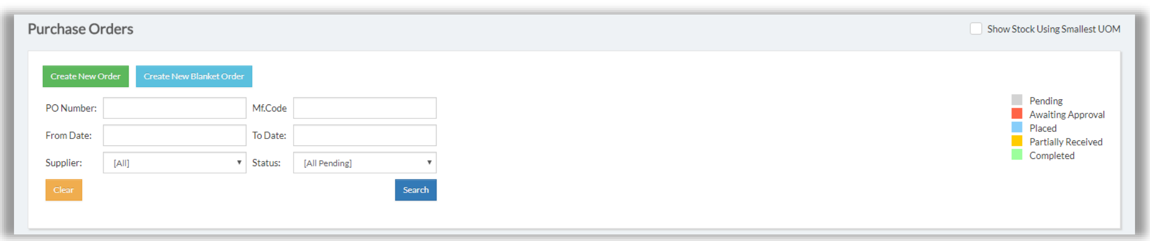
Create Replacement Orders

You can use a Replacement Order to order free replacement items

Set Up Order

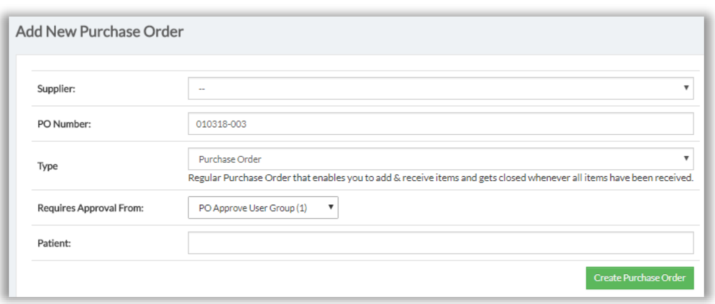
1. To create a Purchase Order, go to Top Menu, click **Procurement**, and select **Purchase Orders**

   Purchase Order screen appears



2. Click **Create New Order**

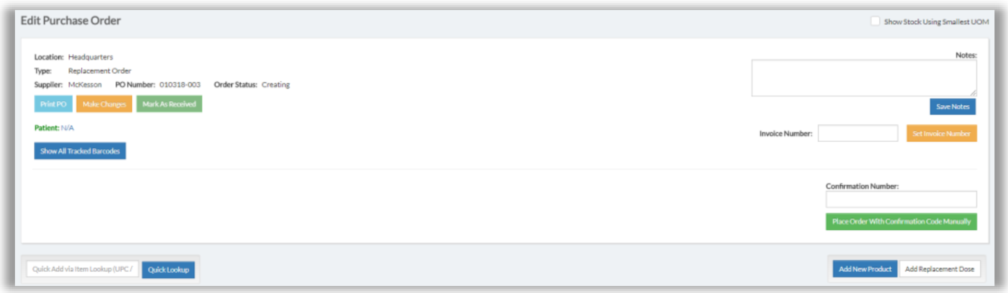
   Add New Purchase Order screen appears



3. Complete fields
    - Supplier – required
    - PO Number – system-generated, but you can change it
    - Type – Set as “Replacement Order”

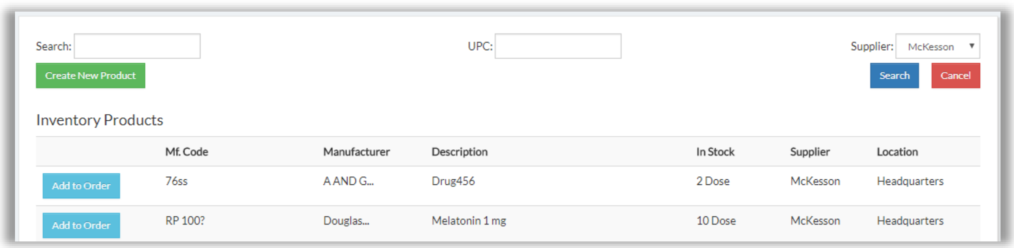
4. Click **Create Purchase Order**

    Edit Purchase Order screen appears



5. Go to lower right and click **Add New Product**

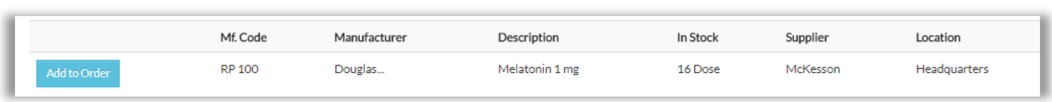
    Popup appears



6. Click in Search box, type product name, and press Enter;

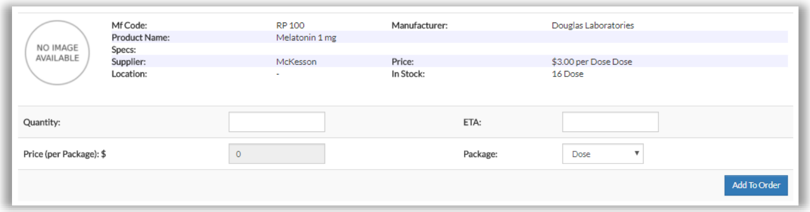
    Or, click in UPC box and scan UPC

    System shows search result



7. Click **Add to Order**

    System shows product details



8. Enter <u>Quantity</u> (required) and set other fields as desired, then click **Add to Order**

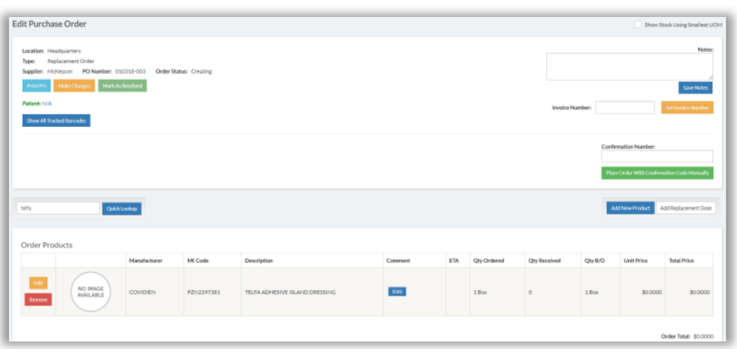
<u>Changing Prices:</u>

If you change <u>Price (per Package)</u> and click **Add to Order**, system will ask if you are sure

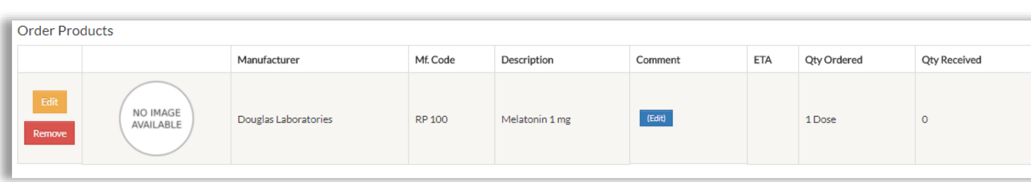
- If you click **Ok**, this will be the new price for the item for all transactions going forward
    - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
    - Go to Finalize Order (below)
- If you click **Cancel**, system will use the new price for this order only
    - Close popup and return to Edit Purchase Order Screen, where your item will be listed at the bottom
    - Go to Finalize Order (below)

<u>Finalize Order</u>

1. Edit Purchase Order Screen appears



Product you chose is at the bottom:



Order Total is $0, since this is not a Purchase Order

2. If you wish:
   - Click **Edit** to set product ETA, or to change quantity, package or price
   - Click **Remove** to remove a product
   - Add other products, or search other suppliers
   - Type Notes (optional) and click **Save Notes**
   - Type an Invoice Number (suggested) and click **Set Invoice Number**

3. Type a Confirmation Number (suggested) and click button **Place Order With Confirmation Code Manually**, then **Ok**
   Screen refreshes, and button is now faded
   This confirms order has been created

4. If you wish, click **Print PO** to print the order, which you can use for Receiving (see *Receive Orders*)

Order Replacement Dose

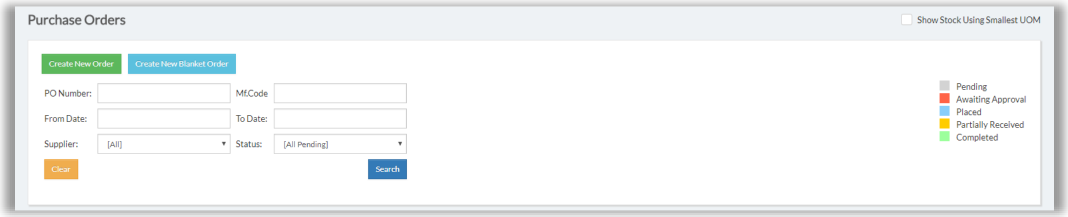
If your system build has Dose Tracking, you can order a dose to replace one that has been Dispensed or Reserved; or one still in stock that is no longer usable

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

You can order a Replacement Dose as part of any order type (Purchase, Sample, Specialty, or Replacement)

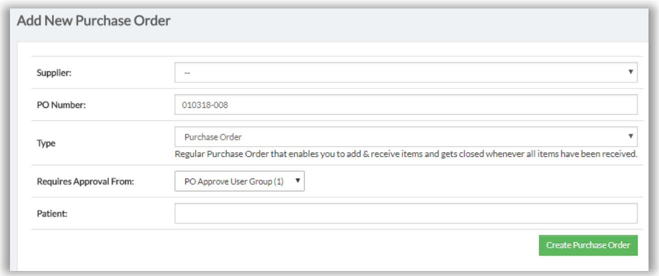
Important: Ordering a replacement dose will not delete the old dose from the Inventory. To order a replacement dose and delete the old dose at the same time, use the Remove Dose feature in Transaction History report (see *Remove Doses*)

1. Go to Top Menu, click **Procurement**, and select **Purchase Orders**
   Purchase Order screen appears



2. Click **Create New Order**

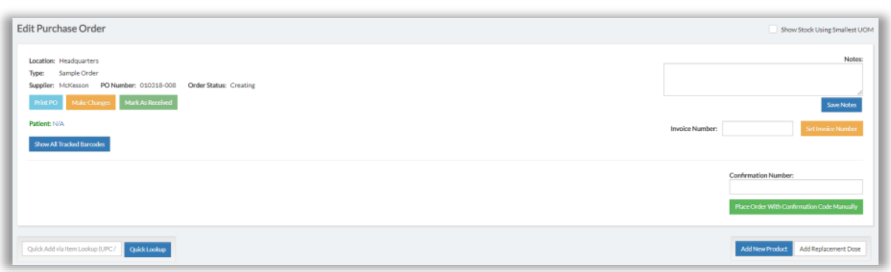
   Add New Purchase Order screen appears



3. Complete fields:
   - Supplier – required
   - PO Number – system-generated, but you can replace this with any number you wish
   - Type – set as desired
   - Requires Approval From – only for Purchase Orders – provide name of Approver

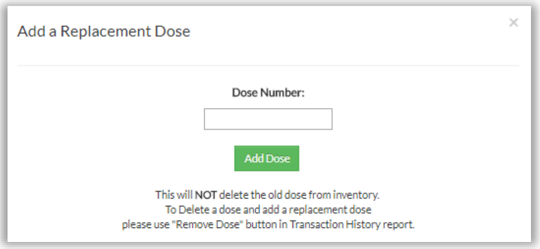
4. Click **Create Purchase Order**

   Edit Purchase Order screen appears



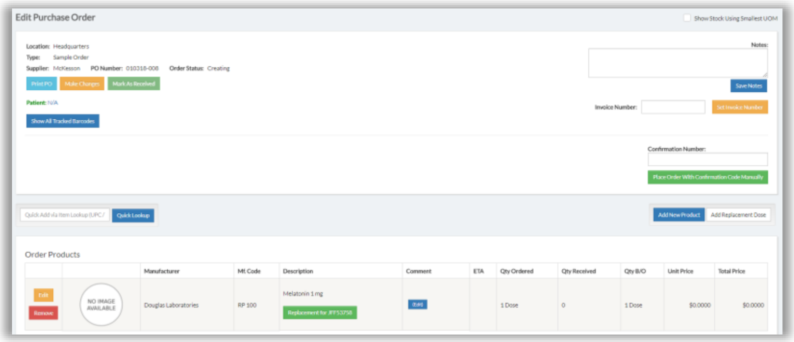
5. Go to the right and click **Add Replacement Dose**

   Popup appears

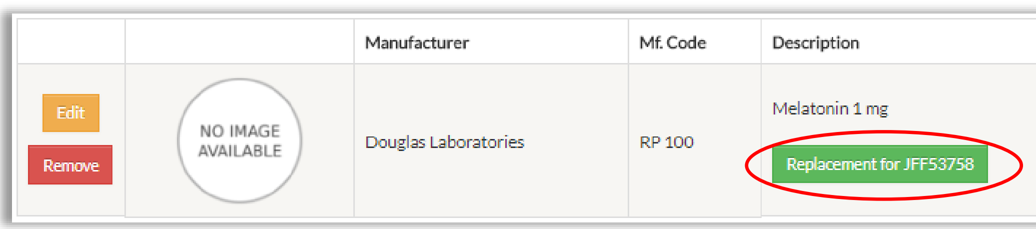


6. Click in box <u>Dose Number</u>, then:
   a. Scan /type in Dose Number of dose being replaced
   b. Click **Add Dose**

   System provides Success message and returns to Edit Purchase Order screen



Dose you ordered is at the bottom, marked "Replacement," with the number of the dose being replaced



7. Add other replacement doses as needed

8. Add non-replacement-dose products as needed (process is same for any order type; for an example, please see <u>Create Purchase Orders</u>: Set Up Order, Steps 5-8)

9. Next:

   If this is a Sample, Specialty, or Replacement Order; or if this is a Purchase Order, and the product does not need approval:

   a. If desired, provide Confirmation Number
   b. Click **Place Order With Confirmation Code Manually**, then **Ok**
   c. Screen refreshes, and button you clicked is now faded

      **This confirms order has been created

   Of, if this a Purchase Order, and the product requires approval:

   a. If desired, provide Confirmation Number
   b. Click button **Send PO to [x] for approval**, where [x] is the approving person or group you chose in Step 3
   c. Screen refreshes, and button is replaced by message:

      "Awaiting approval from [x]"

      Order will not be created until approval received (see below)

   Remember: Ordering a replacement dose does not delete the old dose if it is still in stock. To order replacement dose and delete the old dose at the same time, see Remove Doses

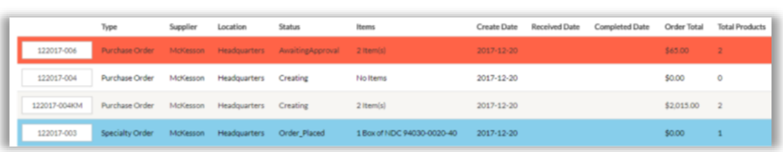
Approve Orders

If you are an Approver, you can approve orders as follows:

1. Go to Top Menu and click **Procurement**, then **Purchase Orders**

   Purchase Order screen appears

   Orders requiring approval will be in Red



	Type	Supplier	Location	Status	Items	Create Date	Received Date	Completed Date	Order Total	Total Products
122017-006	Purchase Order	McKesson	Headquarters	AwaitingApproval	2 Item(s)	2017-12-20			$65.00	2
122017-004	Purchase Order	McKesson	Headquarters	Creating	No Items	2017-12-20			$0.00	0
122017-004KM	Purchase Order	McKesson	Headquarters	Creating	2 Item(s)	2017-12-20			$2,015.00	2
122017-003	Specialty Order	McKesson	Headquarters	Order_Placed	1 Box of NDC 94030-0020-40	2017-12-20			$0.00	1

2. Do one of the following:

<u>To reject the order:</u>

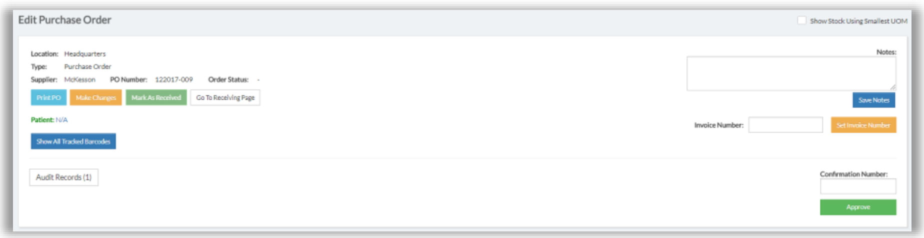
Click **Cancel**, then **Ok**

<u>OR</u>

<u>To approve the order:</u>

a. Go to the left and click the order number box

b. Edit Purchase Order Screen appears



c. Go to right and provide <u>Confirmation Number</u> if desired

d. Click **Approve**, then **Ok**

Approve button is replaced with a faded green button

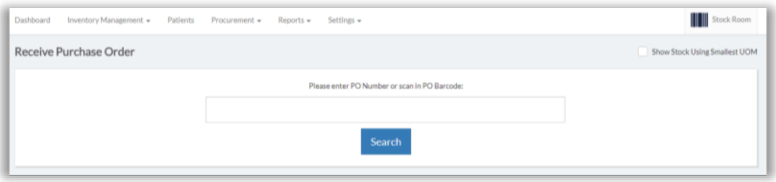
**This means order has been Approved

Scan In Items

Receive Orders

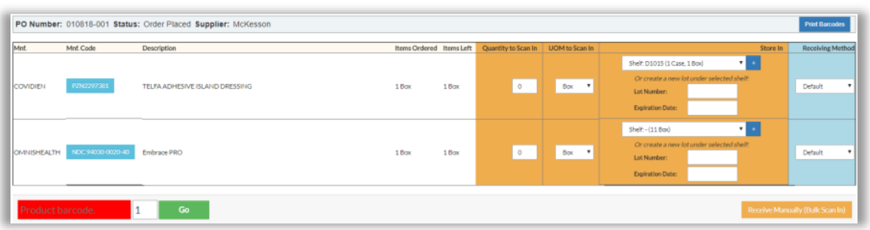
Receiving orders is the recommended way to add items to your inventory
The process is the same for all orders (Purchase, Sample, Specialty, or Replacement)

1. Go to Top Menu, click **Procurement**, and select **Receive Order**
   Receive Purchase Order screen appears



2. Click in large search field and type order number
   <u>Or</u>, scan bar code found on paper copy of order

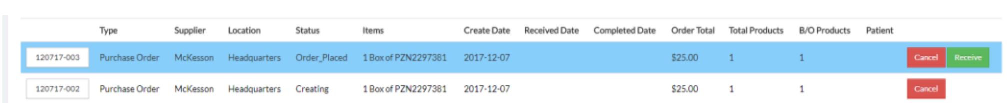
3. Click **Search**
   Receive Order Details Screen appears



<u>Alternate Method:</u>

a. *Go to Top Menu, click **Procurement**, and select **Purchase Orders***

Purchase Order screen appears, with existing orders at the bottom

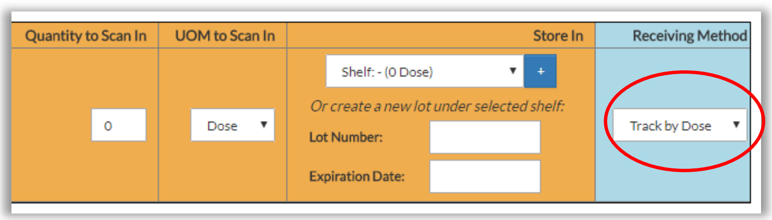


b. *Use search fields to locate the order you wish to receive, then click **Receive** button*
Receive Order Details Screen appears

4. Provide for each line item:
    a. Quantity to Scan In (required)
    b. Shelf – Set as desired, or click + to create new shelf
    c. Lot Number (optional)
    d. Expiration Date (recommended – enables system to track expiration dates and suggest reorders (see *Dashboard Overview*))
    e. Receiving Method – Set as desired, if you wish to track items

        - Tracked items receive a unique ID number and can be Dispensed or Reserved individually (see *Dispense Non-Dose Items* and *Reserve Items*)

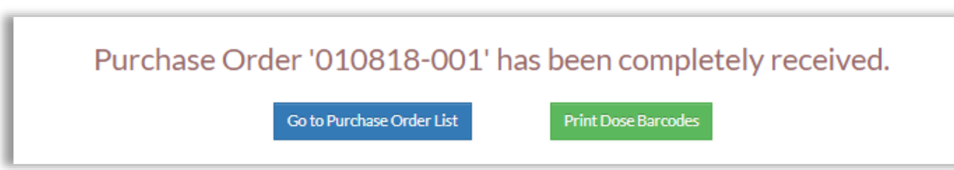
        - If your system build supports Dose Tracking, and the item is a product for which you indicated "Is Dose" (see *Manually Create a New Product*), then the item will be considered a Tracked Dose, and Receiving Method will be already set to "Track by Dose"



Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

        - If item is Replacement Dose (see *Order Replacement Dose*), then Receiving Method is already set to "Track by Dose". The reason is the new dose is replacing a Tracked Dose, so it also must be tracked

5. When finished, click **Receive Manually (Bulk Scan in)**, then **Ok**
    Success screen appears

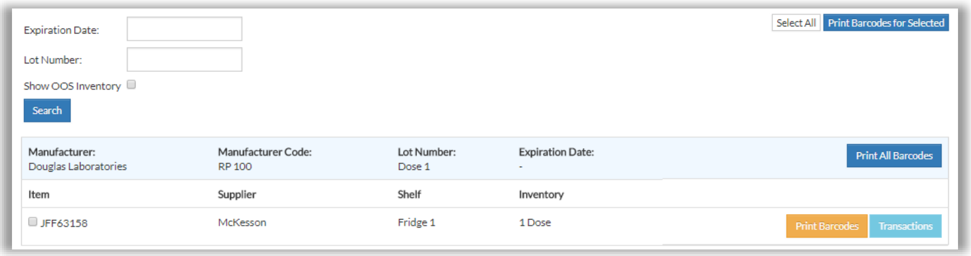


- The button Print Dose Barcodes pertains to Tracked Doses

If you received Tracked Doses it is recommended you print dose barcodes now (see next)

Print Dose Barcodes After Receiving

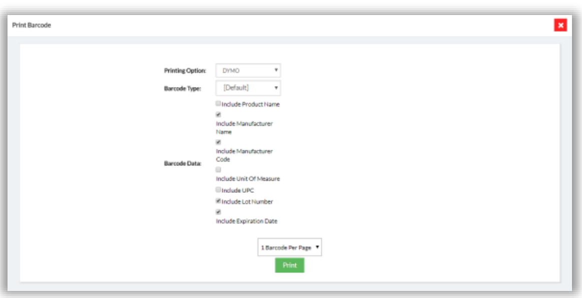
1. System is showing Success screen (see above)
2. Click button **Print Dose Barcodes**
3. Popup appears



4. Under column Item, check the box for dose(s) to print

5. Click **Print Barcodes**

   Popup appears



6. Set / check fields as desired, then click **Print**

   Browser will download print pdf. Open it, and you will see barcode(s)
   - System provides one barcode per dose
   - Barcode format is "[Dose Tracking Number] – [Order Number]":

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Douglas Laboratories @ RP 100

7. You can also print Dose Barcodes from the Inventory List (see Print Barcodes for Doses) or from the Doses in Shelves report (see Doses in Shelves)

Partially Receive Orders

ArbiMed lets you scan in part of an order, and later scan in the remaining part
Each part is called a "Shipment"

There are two main stages:

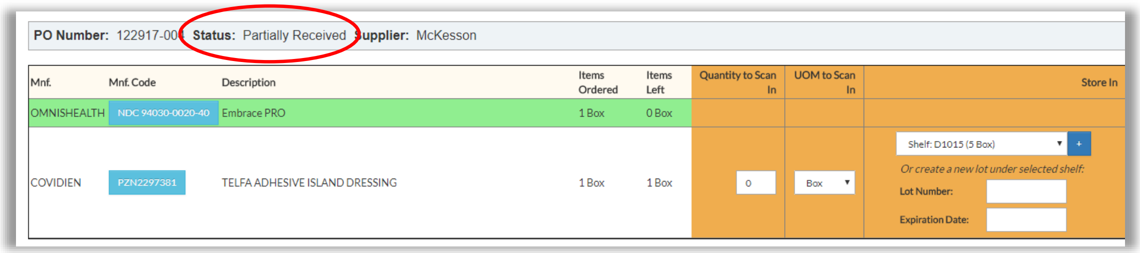
1. Receive Initial Shipment(s)
2. Receive Final Shipment

Receive Initial Shipment(s)

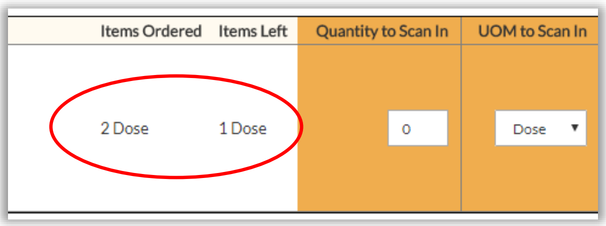
1. On Receive Order Details Screen (see above), set Quantity to Scan In and UOM to Scan In for product(s) for first Shipment

Mnf.	Mnf. Code	Description	Items Ordered	Items Left	Quantity to Scan In	UOM to Scan In	Store In
OMNISHEALTH	NDC 94030-0020-40	Embrace PRO	1 Box	1 Box	1	Box	Shelf: - (10 Box) + Or create a new lot under selected shelf: Lot Number: Expiration Date:
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	1 Box	1 Box	0	Box	Shelf: D1015 (5 Box) + Or create a new lot under selected shelf: Lot Number: Expiration Date:

2. Set other fields as needed, and click **Receive Manually (Bulk Scan-In)**, then **OK**
   Screen refreshes to show received item in green
   Status is "Partially Received"



Note: If you Partially Receive units of one line item, system will not show a green row but rather the unit count change. For instance, if you order two units of a product, then Receive only one of them, the screen will show:



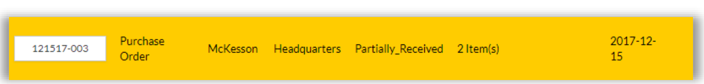
3. Go down and click **Close Shipment**, then **OK**

   System gives Success message

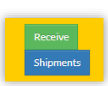
4. Repeat above steps to receive additional shipment(s)
5. If any Shipment includes Tracked Dose(s), it is recommended you print dose barcodes now (see *Print Dose Barcodes After Receiving*, beginning with Step 2)

Receive Final Shipment

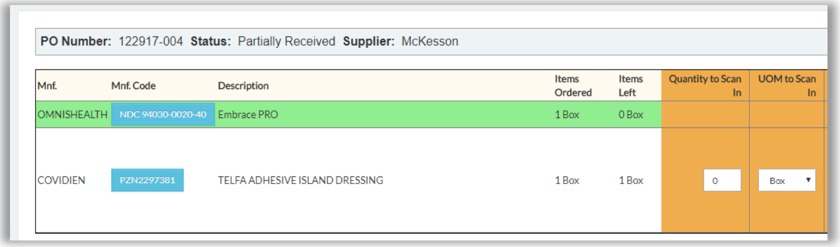
1. Click **Go to Purchase Order List** and locate order:



   Blue "Shipments" button indicates some items received

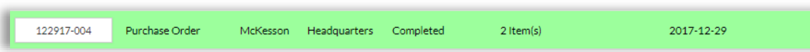


2. To receive rest of order:
    a. Click **Receive**
    Receive Order Details Screen appears as before
    Item(s) already received shown in green row



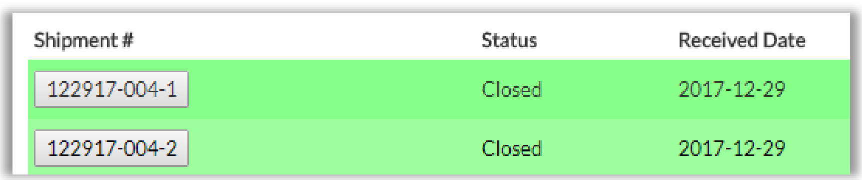
    b. Complete fields as desired
    c. Click **Receive Manually (Bulk Scan-In)**, then **OK**

3. To review Shipment Numbers:
    a. Click **Go to Purchase Order List**
    b. Set <u>Status</u> to “Completed,” then click **Search**
    c. Locate the order, which will appear as follows:



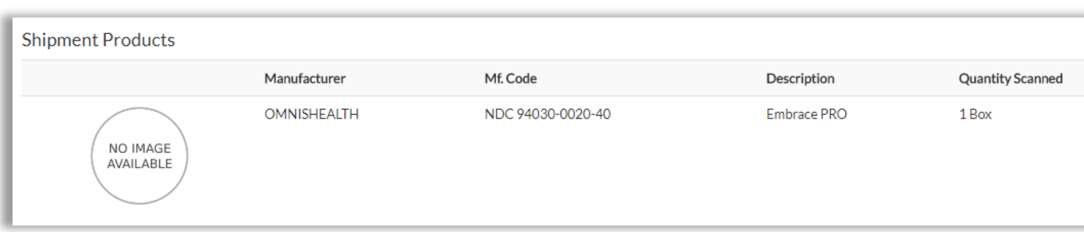
    d. Go to right and click 

    Popup appears



<u>Shipment #</u> is unique for each shipment, and is composed of the order number with a different suffix (-1, -2 etc.) for each shipment

    e. Click a <u>Shipment #</u>, and you can see the product(s) received



Print Barcodes for Doses

If your system build has Dose Tracking, you can print dose barcodes from the Inventory List

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

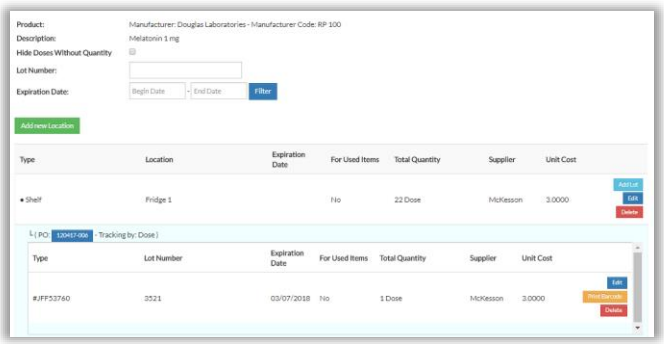
1. Go to Top Menu, click **Inventory Management**, then **Inventory List**

2. Search for desired product, then go to right to <u>In Stock</u> column and click box

   Example:

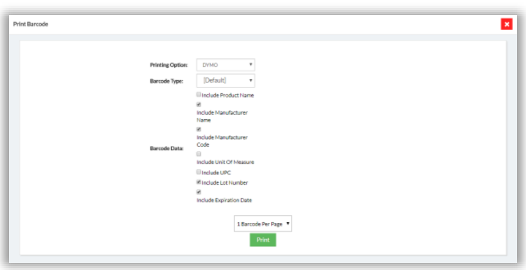
   

   Dose stock appears

3. Locate dose to print, then go to right and click **Print Barcode**

   Print popup appears

4. Set / check fields as desired, then click **Print**

   Browser will download print pdf, which you can print

Add Inventory on Stock Room

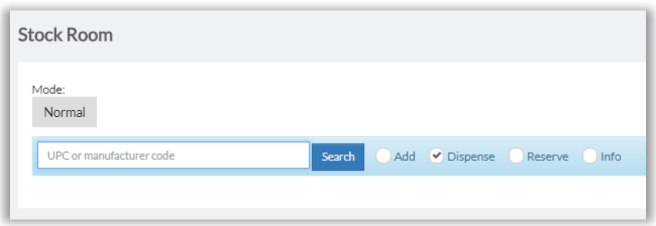
It is recommended that you add items to the inventory by using the Receive Orders process (see Receive Orders), but if necessary you can still add solo items to the Inventory

If your system build supports Dose Tracking, you can only add tracked doses by Receiving Orders

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

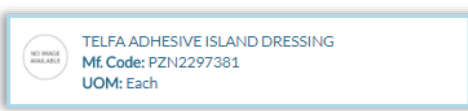
1. Go to Top Menu, to the upper right, and click **Stock Room**

   Stock Room screen will appear

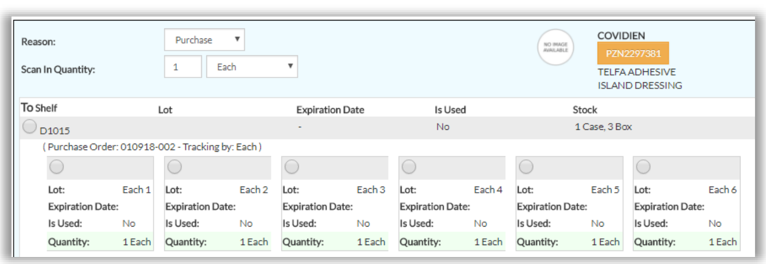


2. Click the **Add** circle
3. Click in Search box and scan UPC;

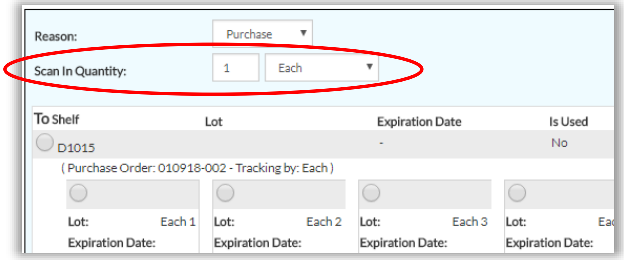
   Or, type product name, and click small info box that appears:



System will display product details



4. Set Scan-In Quantity and Unit of Measure (drop-down menu)



5. Click **Scan In**

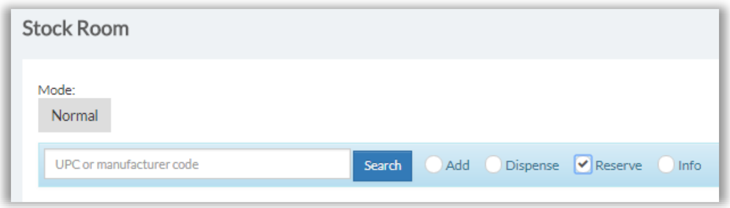
Scan Out Items

Scan-Out comprises two functions: Dispense and Reserve

Reserve Items

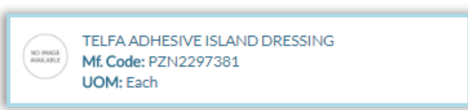
ArbiMed allows you to reserve (set aside) items to certain individuals. These items will be removed from the Inventory.

1. Go to upper right of screen, click **Stock Room**, and click the **Reserve** circle

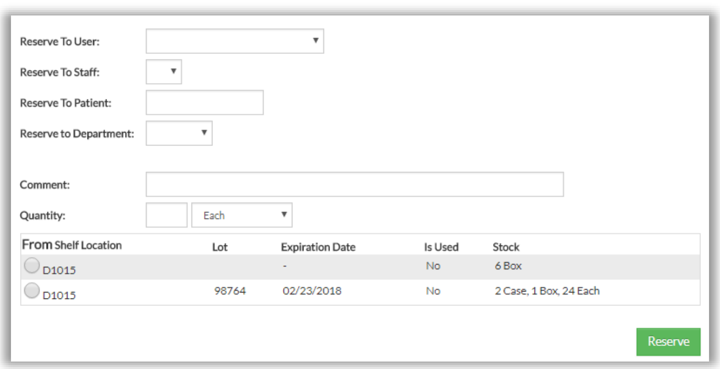


2. Click in Search field and scan UPC or Dose Tracking Number;

   Or, type product name, and click small info box that appears:



   Product stock details appear



3. Complete fields as follows:
    a. Complete "Reserve To" fields as needed
    b. Indicate Quantity and Package
    c. Click circle for From Location (if reserving a Tracked Dose (see Receive Orders, Step 2) click the circle for the Dose)

4. Click **Reserve**

    System will give Success message

    Item has been removed from Inventory and cannot be Dispensed

Unreserve Items

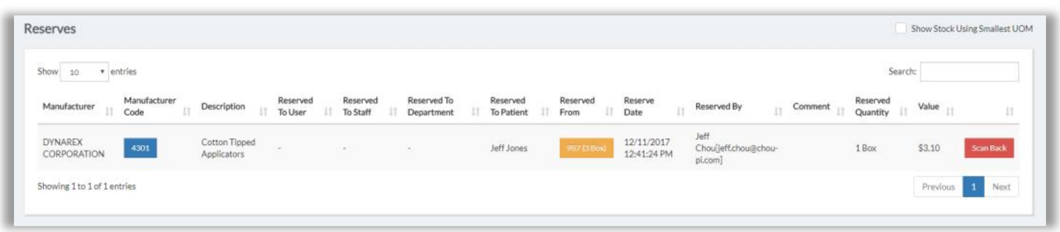
Two methods are available:

- Use Reserved Items List
- Use Stock Room

Use Reserved Items List:

1. Go to Top Menu and click **Inventory Management**, then **Reserved Items**

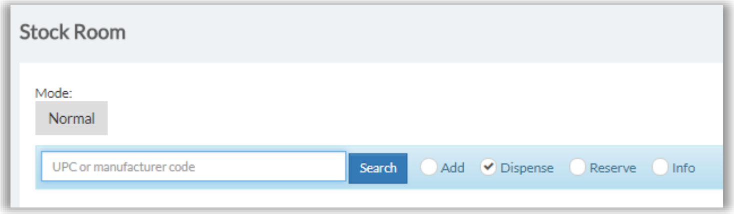
    Reserved Items appear



2. Locate item, then click **Scan Back** to move it back into Inventory

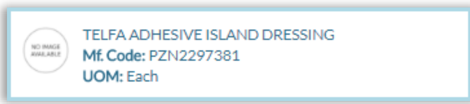
Use Stock Room:

1. Go to upper right of screen and click **Stock Room**

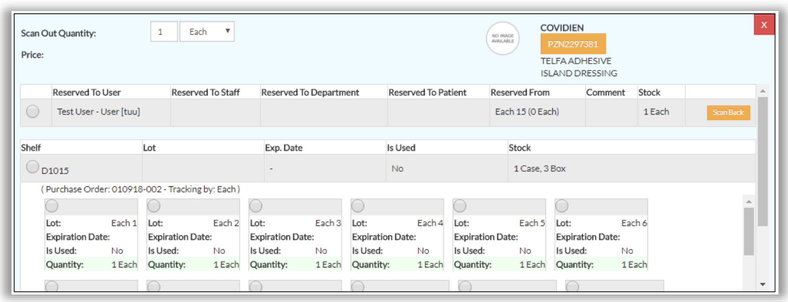


2. Leave Dispense circle selected
3. Click in Search field and scan UPC or Dose Tracking Number;

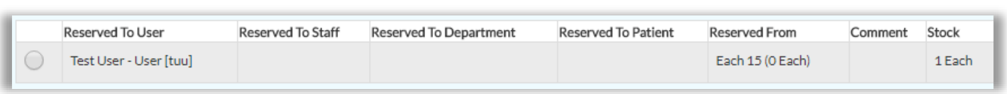
   Or, type product name, and click small info box that appears:



Product stock details appear



Screen also shows currently reserved unit(s)



	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From	Comment	Stock
	Test User - User [tuu]				Each 15 (0 Each)		1 Each

(In this graphic "Each 15" is the name of the lot the item was reserved from; at this point the lot contains 0 units)

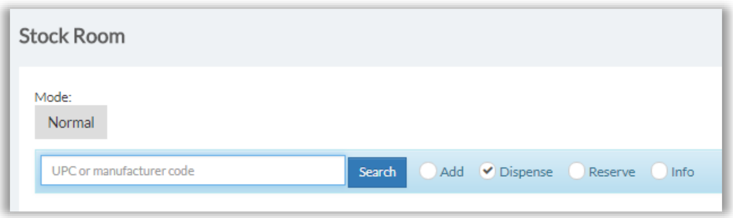
4. Click circle for unit(s) to Unreserve; then click **Scan Back**, and **Ok**

   System gives Success message

Dispense Non-Dose Items

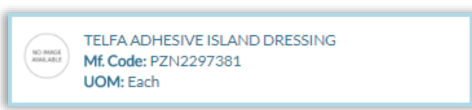
1. Go to the upper right of the screen, and click **Stock Room**

   Stock Room screen will appear, with Dispense as default option

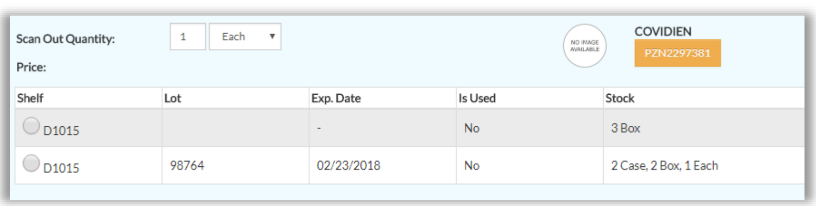


2. Click in Search field and scan UPC;

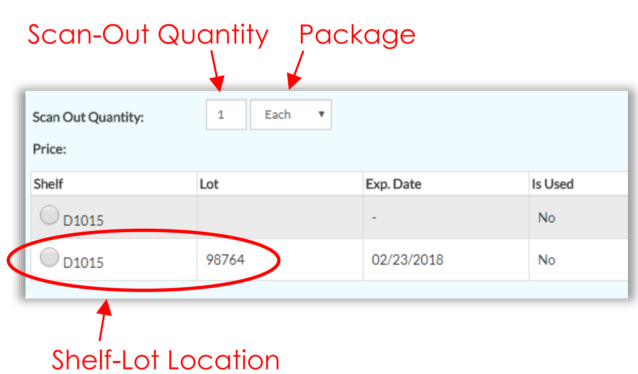
   Or, type product name, and click small info box that appears:



   System will display in-stock units



   Note the fields:



3. Select Scan-Out Quantity, Package, and Shelf-Lot Location

4. Go to right and complete optional fields:
   - Reason (Usage or Adjustment)
   - Doctor
   - Department
   - Customer/Patient

5. Click **Dispense**, and System will confirm:

Product stock decreased by 1 Each. Was: 2 Case, 5 Box, 1 Each --- Now: 2 Case, 5 Box

Undispense Non-Dose Items

1. Go to Top Menu and click **Reports**, then **Transaction History**
2. Populate search fields, then click **Search**

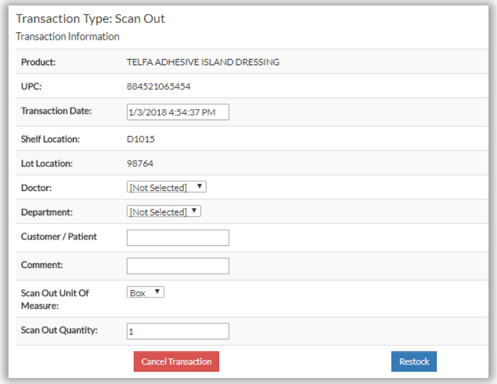
   System displays transactions

   - Red means "Scanned Out"
   - Green means "Scanned In"

Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	$0.0000	$1.0524	-1 Box	2 Case, 6 Box, 1 Each	$0.0000	($26.3100)	02/23/2018
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	$1.0000	$1.0524	1 Box	2 Case, 7 Box, 1 Each	$25.0000	$26.3100	02/23/2018

3. Locate transaction you want, then click  to open the row
4. Click 

   Popup appears



5. Click **Cancel Transaction**, then **Ok**

   System gives Success message

6. Close popup

Dispense Doses

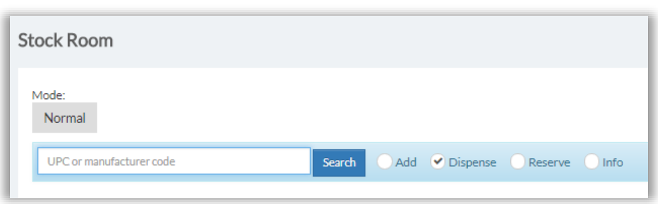
If your system build has Dose Tracking, you can Dispense tracked doses (see Receive Orders)

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

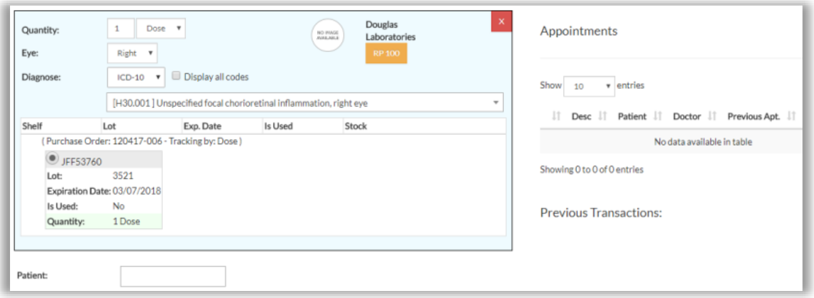
1. Go to upper right, and click **Stock Room**

   Stock Room screen will appear

   Dispense is default option



2. Click in Search box and scan / type in dose tracking number, then click **Search**
   Dose information appears



3. Go to Diagnosis and select ICD code. If necessary, check Display all codes, and use drop-down to change ICD 10, 9 etc.

4. Now indicate patient receiving dose

   Important: Patient Name is **required** for doses received from specialty orders;

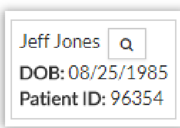
   The name here must match the name on the order (see Create Specialty Orders: Set Up Order)

   The drug must also be assigned to the patient in the Patient List (see Create Patient List)

   Option 1:

   a. Click in Patient box and scan patient number; or type patient name

      System provides small info box



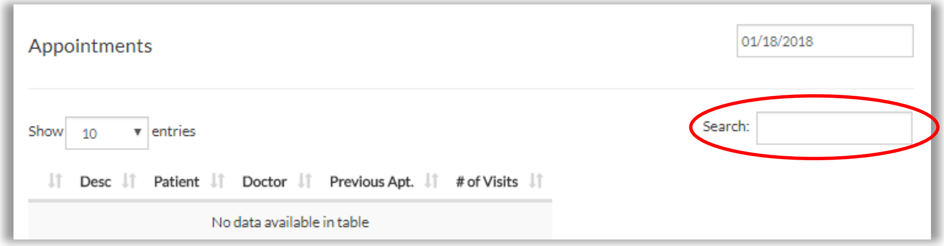
   b. Click the box

   c. Patient is now chosen

OR

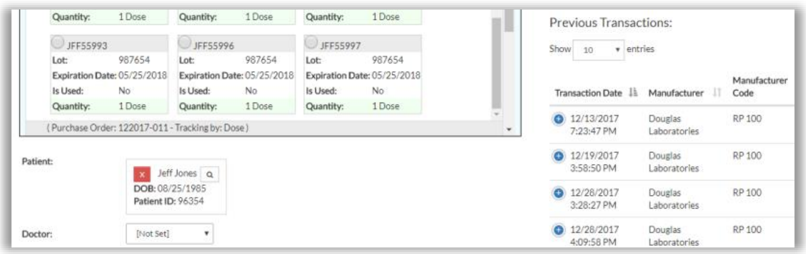
   Option 2:

   a. If you have practice management software integration with ArbiMed, go to right to Appointments section, and use Search box to find an appointment



b. System returns results
c. Select correct appointment with patient
d. Patient is now chosen

5. System shows patient details



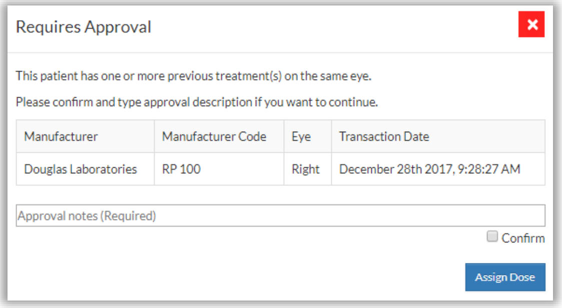
System also provides patient's previous transaction detail

Transaction Date	Manufacturer	Manufacturer Code	Quantity	UOM	Reason	Doctor
12/13/2017 7:23:47 PM	Douglas Laboratories	RP 100	1	Dose	Usage	Dr Smith
12/19/2017 3:58:50 PM	Douglas Laboratories	RP 100	1	Dose	Usage	null

6. Review or set other fields as needed, then click **Dispense Dose**
System gives confirmation

Product stock decreased by 1 Dose. Was: 13 Dose --- Now: 12 Dose

a. Note: When you click **Dispense Dose**, system may ask for confirmation based on product's Usage Warning Days (see *Manually Create a New Product*)

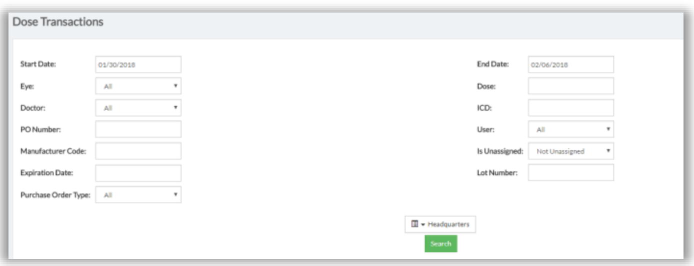


b. If this happens, type Approval notes (Required), check Confirm, then click **Dispense Dose**

Undispense Doses

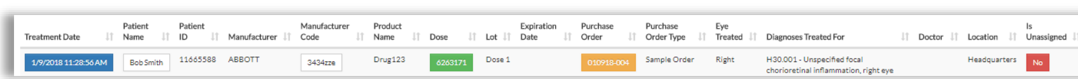
1. Go to Top Menu and click **Reports**, then **Dose Transactions**

   Dose Transactions screen appears



2. To locate the dose, populate search fields and click **Search**

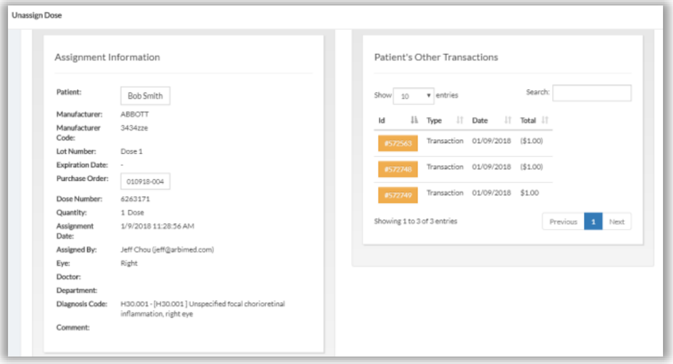
   Matching dose(s) appear



3. Go to right, to column Is Unassigned and click the box "No"

   (Depending on screen resolution, you may have to first click  *to open dose record)*

   Popup appears



4. Confirm details and click **Unassign Dose & Scan Back In**, then **Ok**

   System gives Success message

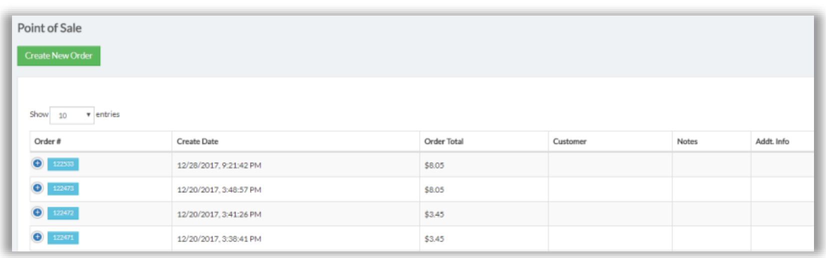
5. Close popup

Dispense to Walk-In Customers (Point of Sale Order)

You can dispense items to Walk-In customers, and also print them a packaging slip

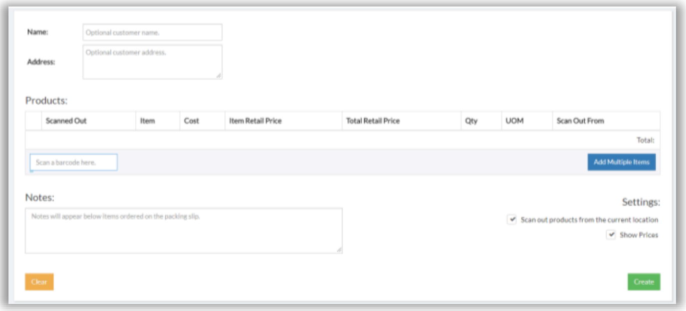
1. Go to Top Menu, click **Inventory Management**, then **Point of Sale**

   Point of Sale screen appears



2. Click **Create New Order**

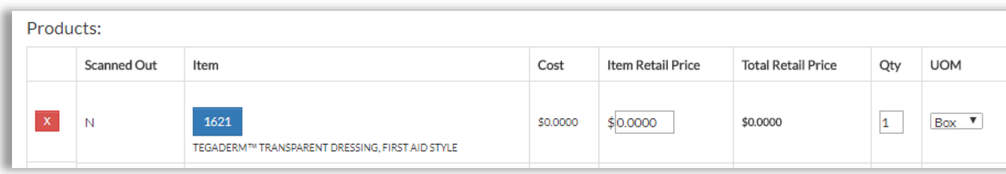
   Popup appears



3. Add items by doing <u>one</u> of the following:

<u>Add One Item</u>:

a. Click in box <u>Scan a barcode here</u> and scan barcode
b. Item is added to order



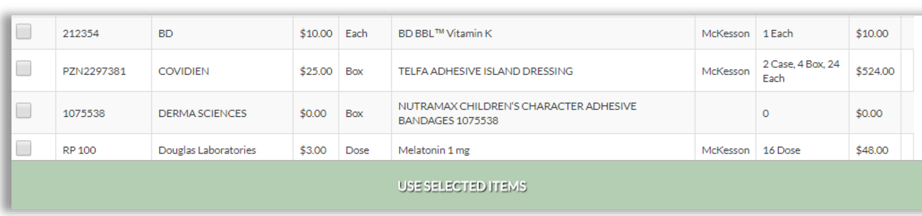
	Scanned Out	Item	Cost	Item Retail Price	Total Retail Price	Qty	UOM
X	N	1621 TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE	$0.0000	$0.0000	$0.0000	1	Box

<u>OR</u>

<u>Add Multiple items</u>:

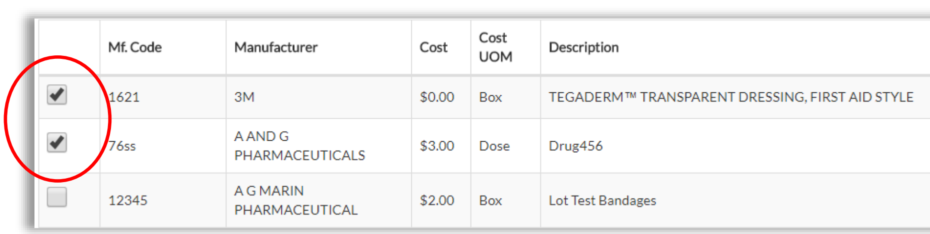
a. Click **Add Multiple Items**

Popup appears



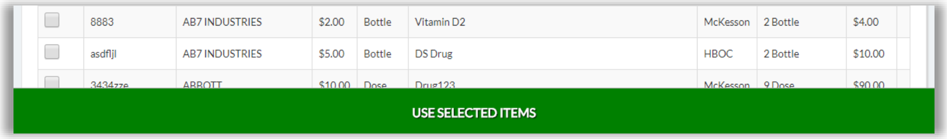
	212354	BD	$10.00	Each	BD BBL™ Vitamin K	McKesson	1 Each	$10.00
	PZN2297381	COVIDIEN	$25.00	Box	TELFA ADHESIVE ISLAND DRESSING	McKesson	2 Case, 4 Box, 24 Each	$524.00
	1075538	DERMA SCIENCES	$0.00	Box	NUTRAMAX CHILDREN'S CHARACTER ADHESIVE BANDAGES 1075538		0	$0.00
	RP 100	Douglas Laboratories	$3.00	Dose	Melatonin 1 mg	McKesson	16 Dose	$48.00

b. Check the items you want



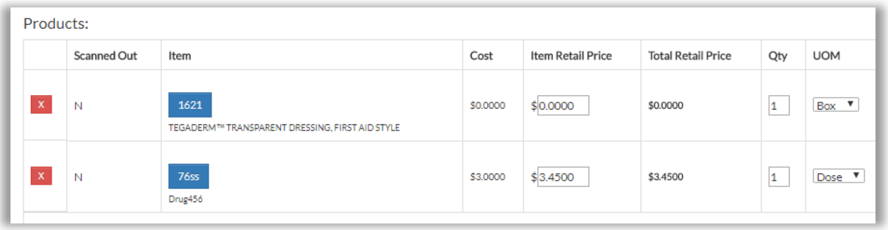
	Mf. Code	Manufacturer	Cost	Cost UOM	Description
✔	1621	3M	$0.00	Box	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE
✔	76ss	A AND G PHARMACEUTICALS	$3.00	Dose	Drug456
	12345	A G MARIN PHARMACEUTICAL	$2.00	Box	Lot Test Bandages

USE SELECTED ITEMS bar turns dark



c. Click **USE SELECTED ITEMS** bar

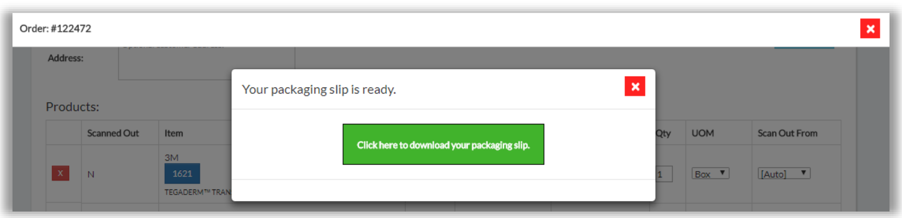
Items are added to order



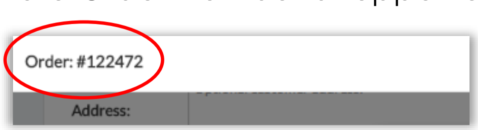
4. If you wish:
   - Provide customer Name and Address
   - Provide Notes
   - Leave box checked for Scan out products from the current location to ensure items will be removed from Inventory
   - Leave box checked for Show Prices

5. Click **Create**

   Slip Ready popup appears



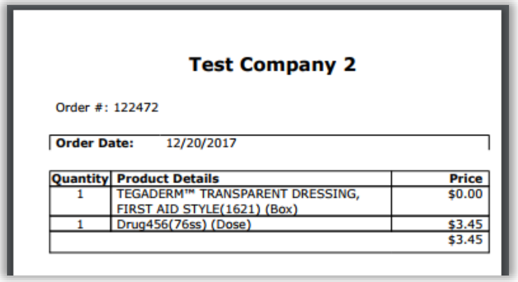
   Note Order Number at upper left



6. Click the button **Click here to download your packaging slip**

   System opens new tab in your browser

This is the packaging slip, which you can print



Test Company 2

Order #: 122472

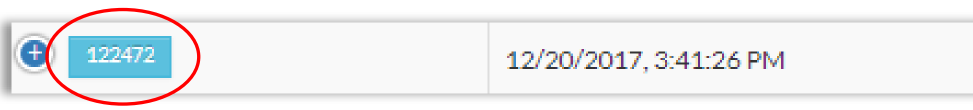
Order Date: 12/20/2017

Quantity	Product Details	Price
1	TEGADERM™ TRANSPARENT DRESSING, FIRST AID STYLE(1621) (Box)	$0.00
1	Drug456(76ss) (Dose)	$3.45
		$3.45

7. Close New Order popup

   Point of Sale screen shows new Walk-In order you created

   Note order number at left

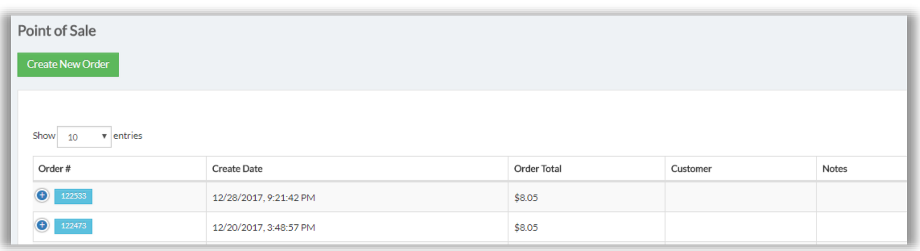


Create Duplicate Point of Sale Order

For your convenience, you can use an existing order as a template for a new order:

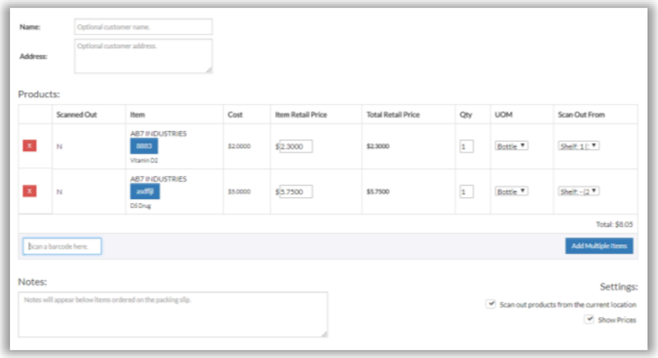
1. Go to Top Menu, click **Inventory Management**, then **Point of Sale**

   Point of Sale screen appears



2. Locate order to duplicate and click , then click **Duplicate**

   Popup appears

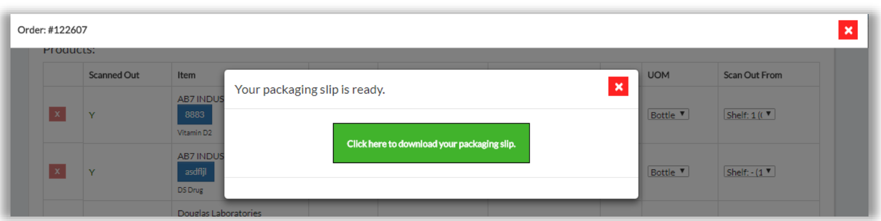


3. If you want to add additional products, scan barcode or click **Add Multiple Items**

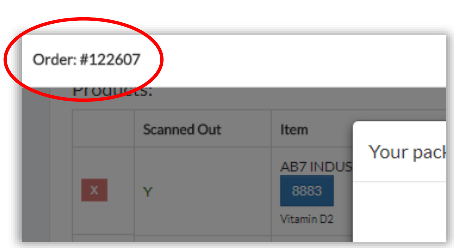
4. Complete fields as you wish:
    - Provide customer Name and Address
    - Provide Notes
    - Leave box checked for Scan out products from the current location to ensure items will be removed from Inventory
    - Leave box checked for Show Prices

5. Scroll down and click **Create**

    System gives Success message, and popup now shows packaging slip ready

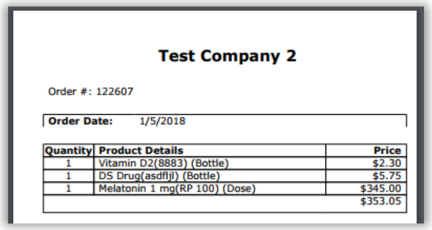


Note new Order Number at upper left



6. Click the button **Click here to download your packaging slip**

   System provides slip in new tab in your browser, which you can print



Test Company 2

Order #: 122607

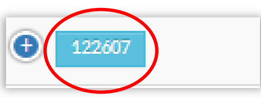
Order Date:	1/5/2018	

Quantity	Product Details	Price
1	Vitamin D2(8883) (Bottle)	$2.30
1	DS Drug(asdfljl) (Bottle)	$5.75
1	Melatonin 1 mg(RP 100) (Dose)	$345.00
		$353.05

7. Close popup

   Point of Sale screen shows new Walk-In order you created

   Note order number at left



Dispense or Reserve Using Bill of Materials

A Bill of Materials ("BOM") is a set of recipes that can be used to form a kit of items. A BOM is listed in the Inventory as a single item, and kits are listed as units of the BOM.

Kits can be scanned out for Dispense or Reserve, and when that happens they subtract their items from the Inventory.

Using a BOM involves three stages:

Stage 1: Create BOM

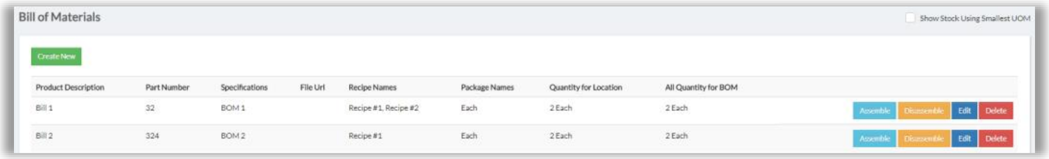
Stage 2: Assemble Kits

Stage 3: Scan Out Kits

Stage 1: Create Bill of Materials

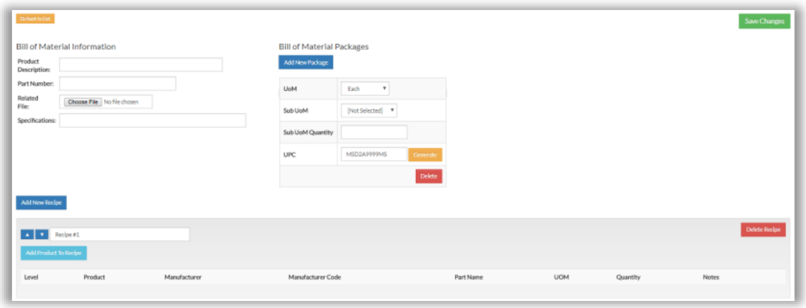
1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**

   Bill of Materials screen appears



2. Click **Create New**

   Create New Bill of Materials screen appears



3. Provide:

   - Description (just like with a product)
   - Part Number (functions in the system like Manufacturer Number does for a product)

4. Default recipe is Recipe #1. Edit this name if you wish, then add products to the recipe as follows:

   a. Click **Add Product to Recipe**

      Manufacturer Code search box appears

   b. Provide manufacturer code or product name, then click **Search**

      Product info appears

Manufacturer Code: 8883 Search

Manufacturer	Manufacturer Code	Product Description
AB7 INDUSTRIES	8883	Vitamin D2

5. Go to right and click **Select**, and then:

   a. Specify <u>UOM</u> and <u>Quantity</u>

      <u>**Important**</u>: UOM and Quantity define the makeup of the groups, that is, the ratios of items making up the groups.

   b. Provide <u>Part Name</u> (recommended) and <u>Notes</u> if desired

   c. Provide additional products by clicking **Add Product to Recipe** and repeating these steps a-e

6. Go up to <u>Bill of Materials</u> <u>Packages</u> section and note the default is "Each." This is the unit of measure for each group created with this BOM. If you wish you can change this and/or create other levels of packaging

7. Click **Save Changes**

   System gives Success message

8. Repeat these steps if you wish to create additional Recipes

Stage 2: Assemble Kits

Now that you have set up a Bill of Materials and created Recipe(s), use a Recipe to assemble Kits:

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
2. Locate BOM you created (in this case, Bill 2)

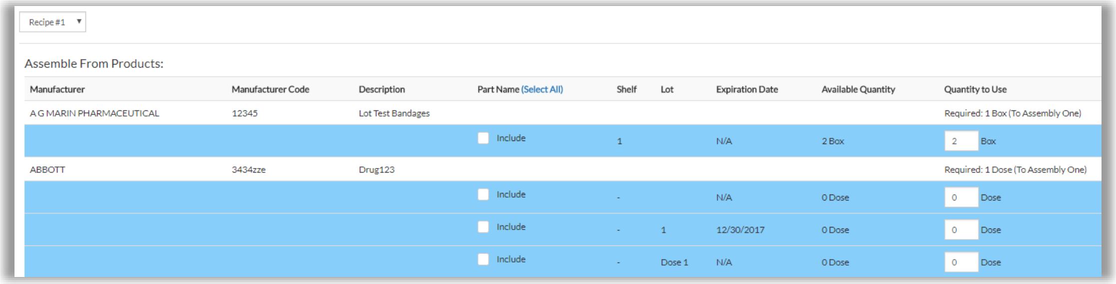
Create New

Name	Part Number	Description	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM
Bill 1	32	BOM 1 for test		Recipe #1, Recipe #2	Each	5 Each	5 Each
Bill 2	324	test		Recipe #1	Each	0 Each	0 Each

"0 Each" means this BOM currently has no kits

3. Go to right and click **Assemble**

   Screen shows your recipe, and also the shelf-lot locations from which to obtain items for the kit



4. Next:
   a. If you created multiple recipes for this BOM, use Recipe drop-down menu to select a recipe
   b. Check "Include" for the shelves/lots from which to pull Recipe ingredients
   c. For checked shelves/lots, indicate Quantity to Use

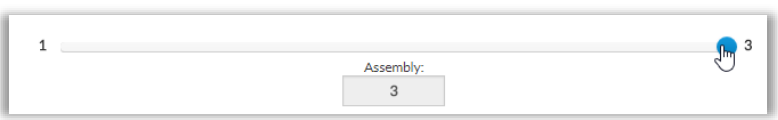
5. Scroll down and click **Calculate**

   Counting bar appears that tells you how many kits you can make

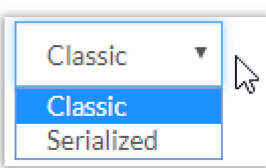
   In this example, a maximum of three kits can be made

6. Drag the button to indicate how many kits you want to assemble

   For instance, to make three kits, you would set the button to "3":



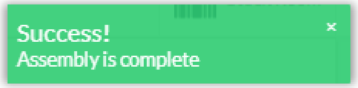
7. Under Assembly Mode, select "Classic" or "Serialized"



- Serialized – Lets you create a unique barcode for each kit; replace items within the kit; and create expiration date alert for kit items.
- Classic – Lets you to build kits and track their inventory without inner item distinction.

8. Click **Choose**, then **Ok**

   System gives Success message



9. Go to upper left and click **Go back to List**

   Bill of Materials screen appears

   Column Quantity for Location shows “3 each” for your BOM, because you just created 3 groups

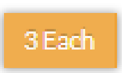
Create New

Name	Part Number	Description	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM
Bill 1	32	BOM 1 for test		Recipe #1, Recipe #2	Each	5 Each	5 Each
Bill 2	324	test		Recipe #1	Each	3 Each	3 Each

If you go to Inventory List, you can locate your BOM

	324	Test Company 2	$0.00		BOM 2 for test

Screen will show it has 3 kits



Stage 3: Scan Out Kits

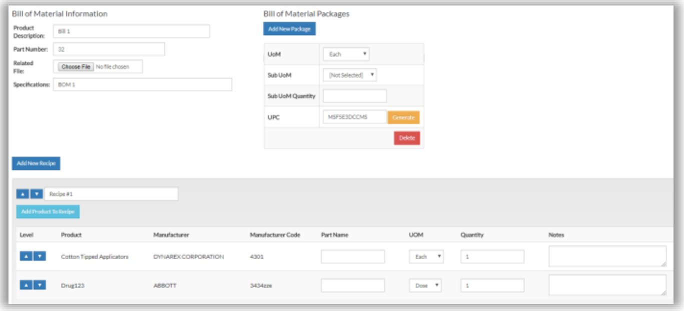
Once you have formed kits, you can scan them out for Dispense or Reserve

Dispense Kits

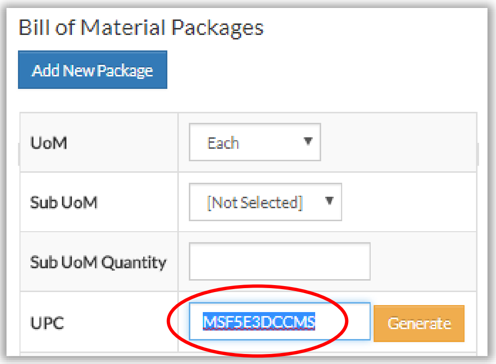
1. First, copy your BOM’s UPC:

a. On Bill of Materials screen, locate your BOM and click **Edit**

Bill of Material Information screen appears



b. Go to upper right, to Bill of Material Packages section, and highlight and copy the UPC code



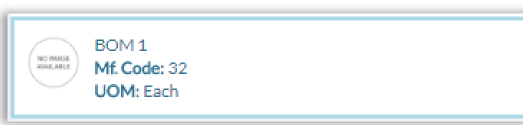
Alternate Method:

Go to Inventory List, find the BOM and copy its UPC

2. Next, go to Stock Room

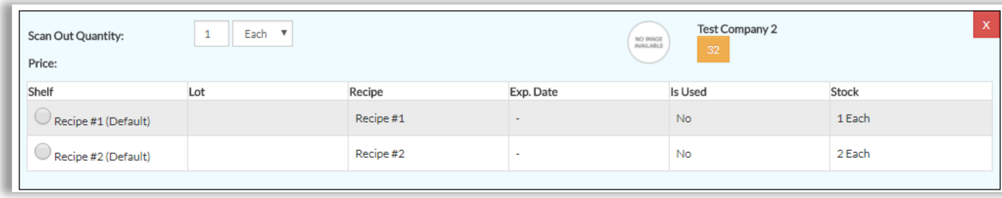
a. Paste UPC into Search field

Small info box appears



b. Click the box

BOM details appear



Under column Stock, the term "Each" refers to kit(s) that you created for each Recipe

3. Click the circle for a Recipe, then set Scan Out Quantity
4. Go to right and complete other fields, then click **Dispense**

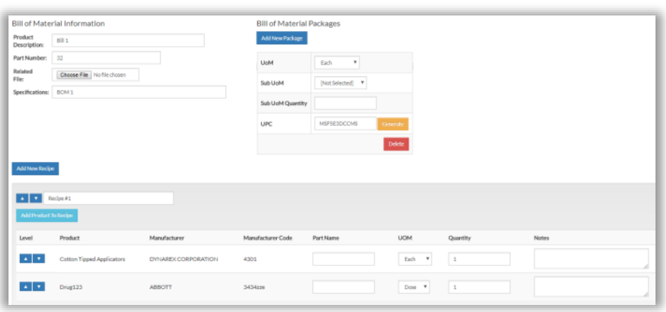
   System confirms Dispense

Product stock decreased by 1 Each. Was: 3 Each --- Now: 2 Each

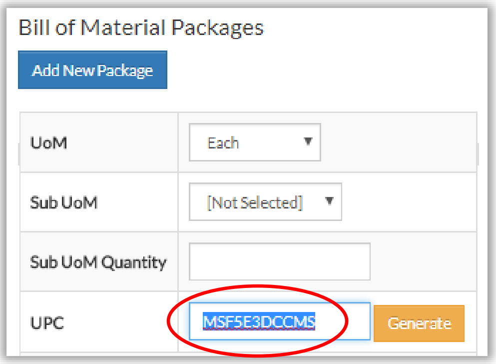
Reserve Kits

1. First, copy your BOM's UPC:
   a. On Bill of Materials screen, locate your BOM and click **Edit**

      Bill of Material Information screen appears



   b. Go to upper right, to Bill of Material Packages section, and highlight and copy the UPC code

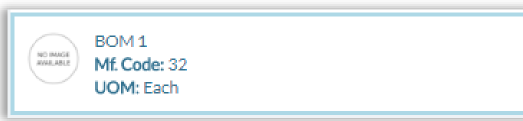


<u>Alternate Method:</u>

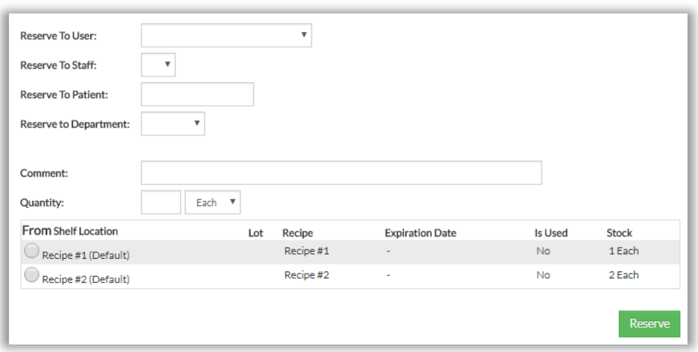
Go to the Inventory List, find the BOM and copy its UPC

2. Next, go to Stock Room
    a. Select <u>Reserve</u>
    b. Paste UPC into <u>Search</u> field

    Small info box appears



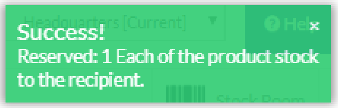
    c. Click the box, and BOM details appear



Under column <u>Stock</u>, the term "Each" refers to kit(s) that you created using each Recipe

3. Click the circle for a Recipe
4. Complete other fields, then click **Reserve**

   System gives Success message



Disassemble Kits

To disassemble a kit, do the following:

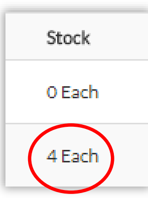
<u>Disassemble Classic Kits</u>

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
2. Locate BOM, then click **Disassemble**

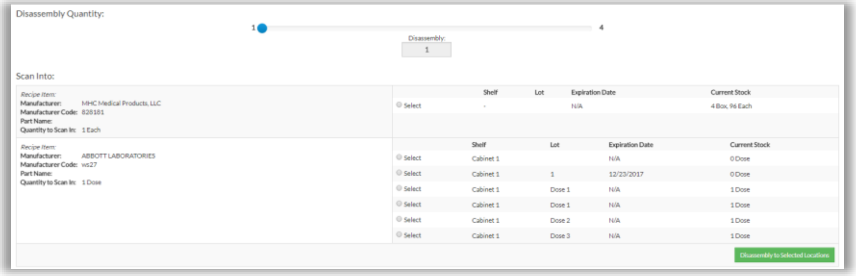
   Disassemble screen appears

On the right under <u>Stock</u> you can see how many kits currently exist for a given recipe

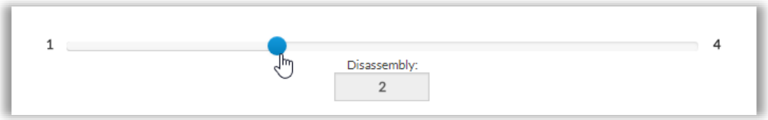
In this case, four groups exist for Recipe #2



3. Now imagine we want to disassemble two kits for Recipe #2
   - Click **Select** for Recipe #2
   - Disassembly Quantity screen appears



4. Drag the button to indicate how many kits (in this case, 2)



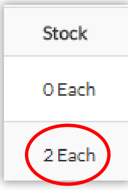
5. Select the shelf-lot locations that should receive back the kit items

6. Click **Disassembly to Selected Locations**

   System gives Success message

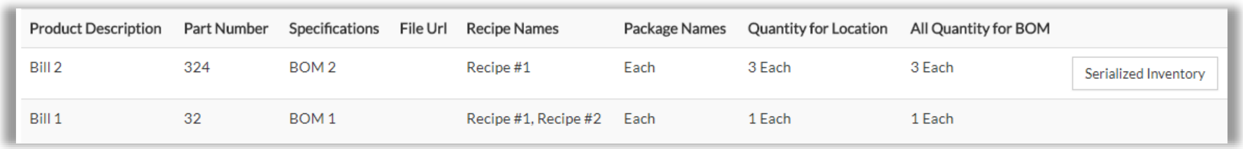
   Disassembly screen appears

   Screen shows recipe with lower Stock count (in this case, 2, since 4 - 2 = 2)



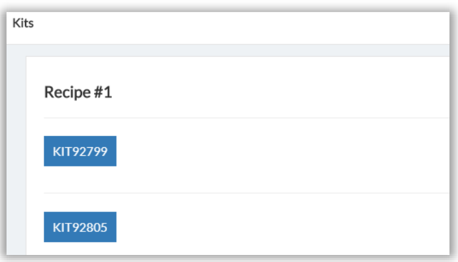
Disassemble Serialized Kits

1. Go to Top Menu, click **Inventory Management**, then **Bill of Materials**
   Bill of Materials screen appears

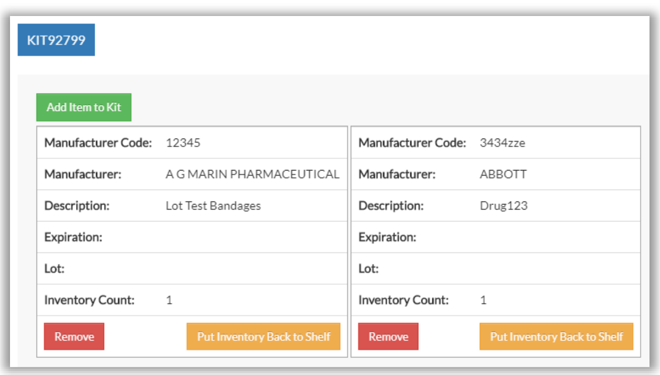


Product Description	Part Number	Specifications	File Url	Recipe Names	Package Names	Quantity for Location	All Quantity for BOM	
Bill 2	324	BOM 2		Recipe #1	Each	3 Each	3 Each	Serialized Inventory
Bill 1	32	BOM 1		Recipe #1, Recipe #2	Each	1 Each	1 Each	

2. Locate desired BOM, then click **Serialized Inventory**
   Popup appears



3. Locate Kit to disassemble, then click its ID number (example: KIT92799)
   Kit contents appear



4. Locate item to delete, then click <u>one</u> of the following:
    - **Remove** – Deletes item from this Kit and from Inventory
    - **Put Inventory Back to Shelf**
        - Puts the item back in the product inventory count
        - System will create a "Disassembly" shelf to receive the item
5. If desired, click **Add Item to Kit** to add a new item
6. Close popup, and refresh screen

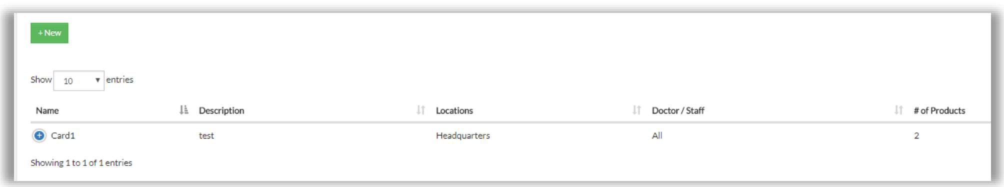
Dispense Items With Preference Cards

For your convenience, you can create a special bar code (preference card) that can be used repeatedly to scan out certain combinations of products

<u>**Stage 1: Create Preference Card**</u>

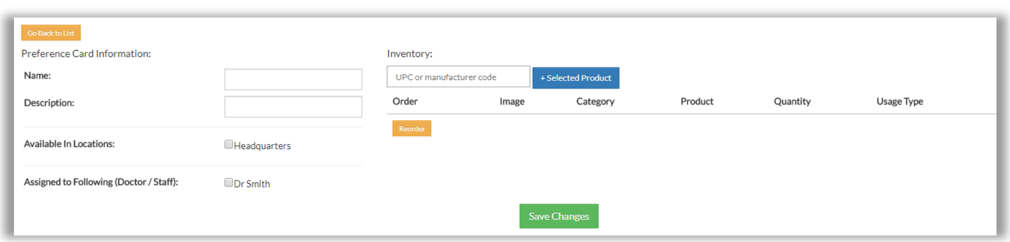
1. Go to Top Menu, click **Inventory Management,** then **Preference Cards**

   Preference Cards screen appears



2. Click **+New**

   Create Preference Cards screen appears



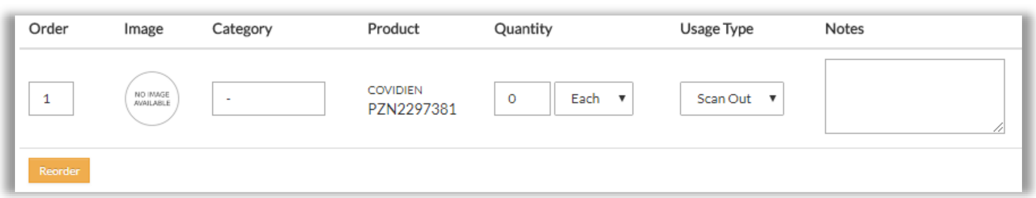
3. Complete fields:
    - Name (required)
    - Description
    - Location (required)
    - Dispensed to Following (Doctor/Staff) (required)

4. Click in Inventory field and provide UPC, manufacturer code or product name

    Small info box appears

5. Click the box

    Product fields appear



6. Enter Quantity (required) and set other fields as you wish

7. Add more items as needed, then scroll down and click **Save Changes**

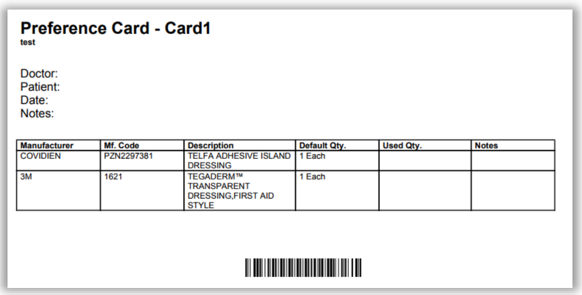
Use Preference Card to Dispense Items

1. Go to Top Menu, click **Inventory Management**, then **Preference Cards**

2. Locate desired card and click to open its row

   System shows buttons

3. Click **Print**, and browser opens pdf you can print. For example:



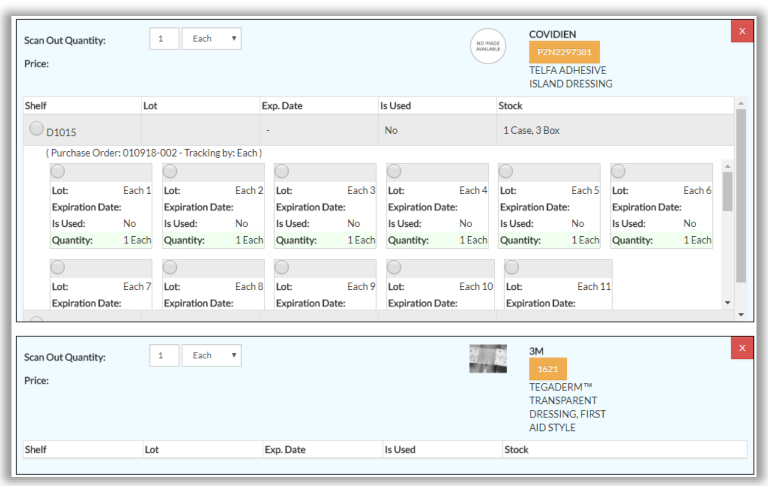
Preference Card - Card1
test

Doctor:
Patient:
Date:
Notes:

Manufacturer	Mf. Code	Description	Default Qty.	Used Qty.	Notes
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	1 Each		
3M	1621	TEGADERM™ TRANSPARENT DRESSING,FIRST AID STYLE	1 Each		

4. Print pdf, then go to Stock Room and scan it for Dispense

   Preference Card items appear, with Quantity and Unit of Measure set according to Card



5. Make changes if necessary:
    a. Adjust Quantity and/or Unit of Measure
    b. Click x to remove items
    c. Add additional items by scanning or typing UPC, or typing product name

6. Go to right and populate Reason, Doctor etc. as needed

7. Click **Dispense**

   Items are scanned out of Inventory

Other Functions

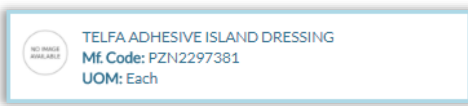
Transfer Non-Tracked Items

You can transfer non-tracked items:

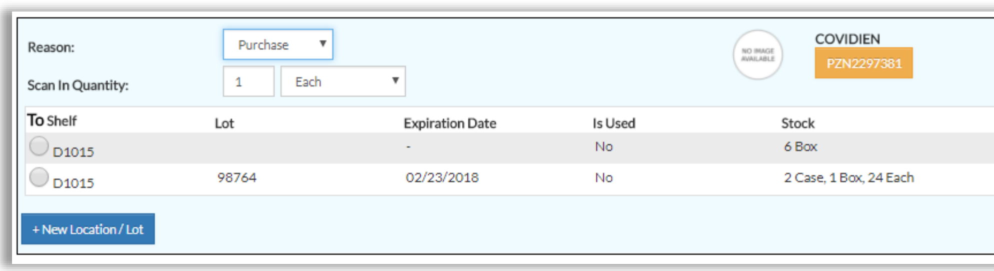
- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see Manually Create a Product / Stage 2: Set Advanced Details / Step 1 / Other Location Settings / Add this product to other locations)

1. Go to Stock Room and click Add circle
2. Click in Search field and scan UPC;

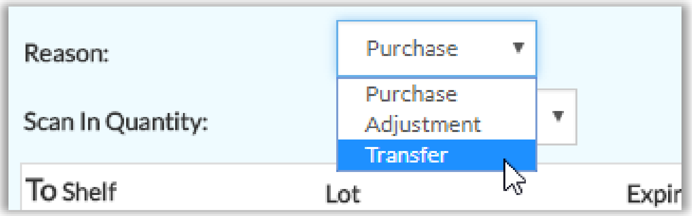
   Or, type product name, and click small info box that appears:



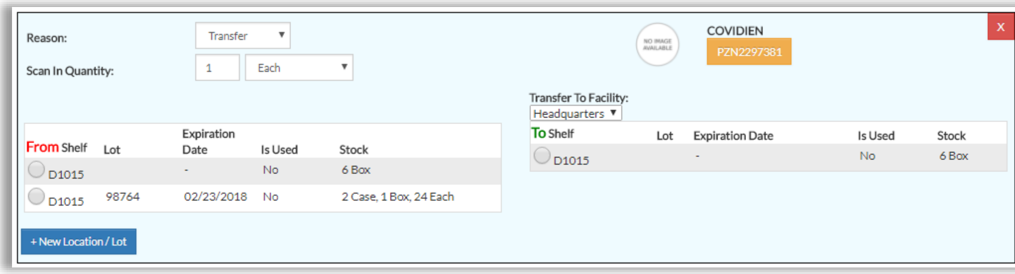
   Product stock appears



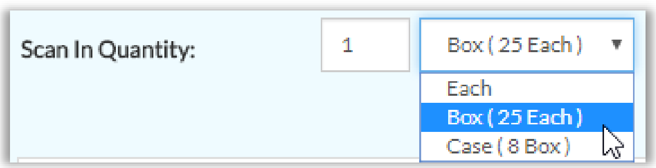
3. If you wish to add additional items, repeat Steps 2-3
4. For each product, do the following:
   a. Set Reason to "Transfer"



Screen will display Transfer functions

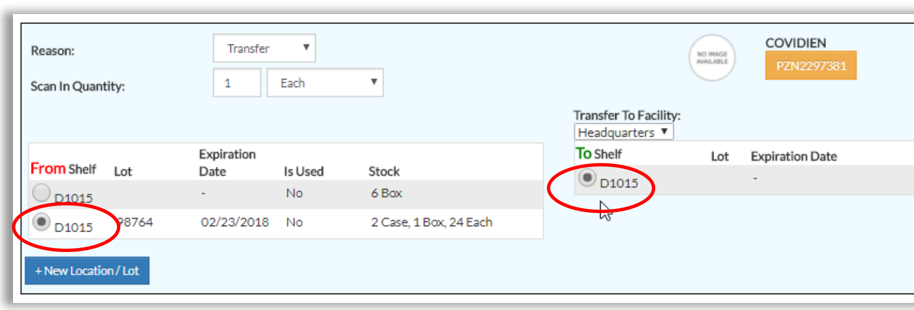


b. Set Scan In Quantity and Unit



c. Set Transfer To Facility

d. Click the circles for From and To shelf-lots



5. Click **Scan In**

Screen refreshes and confirm Transfer

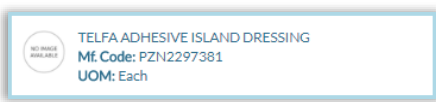
Transfer Tracked Items

You can transfer non-tracked items:

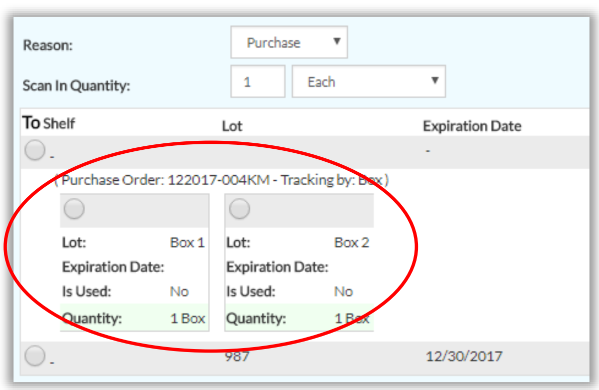
- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see Manually Create a Product / Stage 2: Set Advanced Details / Step 1 / Other Location Settings / Add this product to other locations)

1. Go to Stock Room and click Add circle
2. Click in Search field and scan UPC;

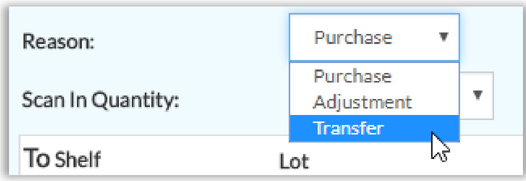
   Or, type product name and click small info box that appears



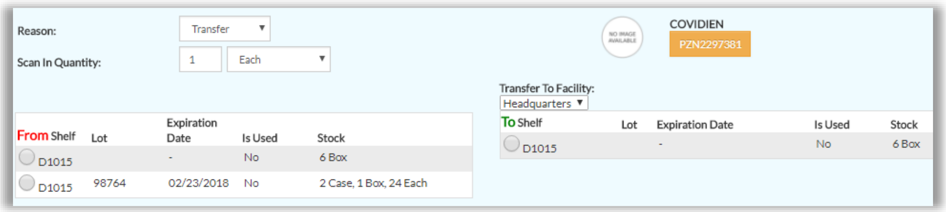
   Product stock will appear, showing tracked items



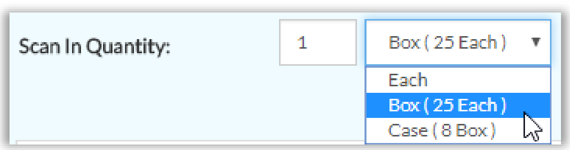
3. If you wish to add additional items for Transfer, repeat Step 2
4. For each product to Transfer, do the following:
   a. Set Reason to "Transfer"



Screen will display Transfer functions

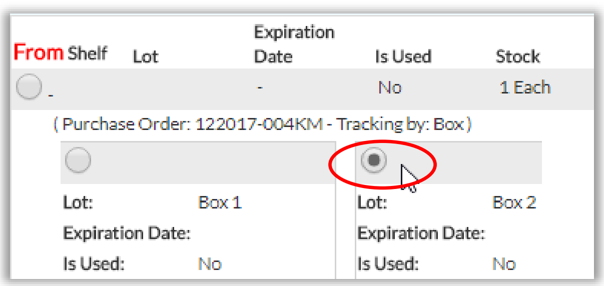


b. Set Scan In Quantity and Package

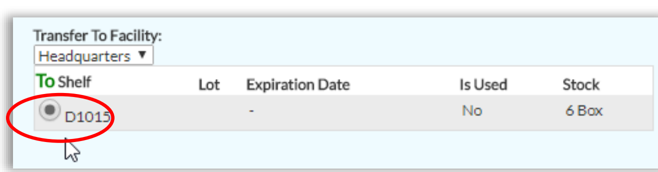


c. Select Transfer To Facility (the physical address to receive the item)

d. On the left, click the circle for the item you want to transfer:



e. On the right, click the circle for destination shelf-lot



Note: From Lot will automatically transfer to destination shelf

5. Click **Scan In**

   Screen refreshes and confirms Transfer

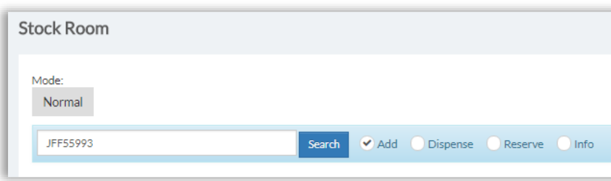
Transfer Doses

If your system build has Dose Tracking, you can transfer doses

- from one shelf-lot location to another inside the same address
- from one physical address to another, provided you had added the product listing to that address (see Manually Create a Product / Stage 2: Set Advanced Details / Step 1 / Other Location Settings / Add this product to other locations)

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Stock Room and click Add circle
2. Click in Search field and scan / paste / type in dose number

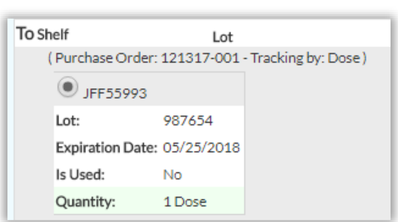


Alternate Method:

You can also type in product name, and system will pull up product

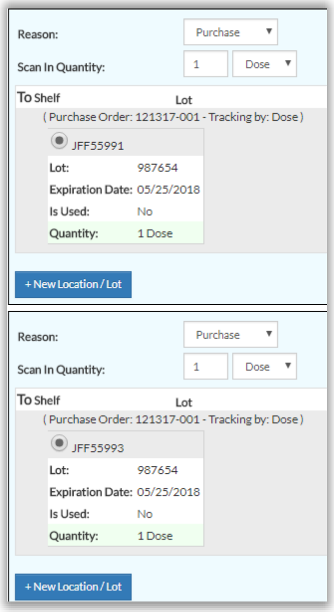
However, this method only lets you transfer one dose at a time

3. Click **Search**, and dose will appear



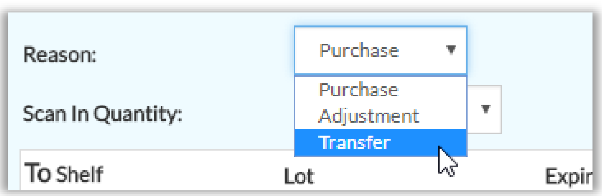
4. If you wish to add additional doses, repeat Steps 2-3

   Doses will appear together:

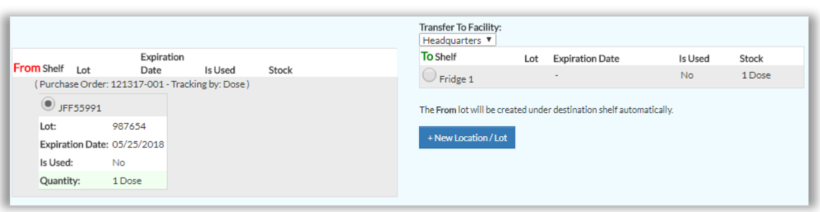


5. For <u>each dose</u>, do the following:

   a. Set <u>Reason</u> drop down menu to "Transfer"

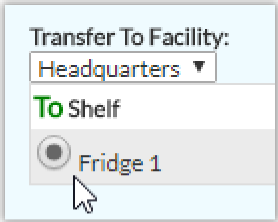


   Screen displays Transfer functions



   b. Select <u>Transfer To Facility</u> (the physical address to receive the dose)

   c. Click circle for the destination shelf / lot



6. Click **Scan In**

   System gives Success message

Remove Doses

"Remove" refers to deleting from the Inventory a dose that is damaged, expired or otherwise not fit for use.

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

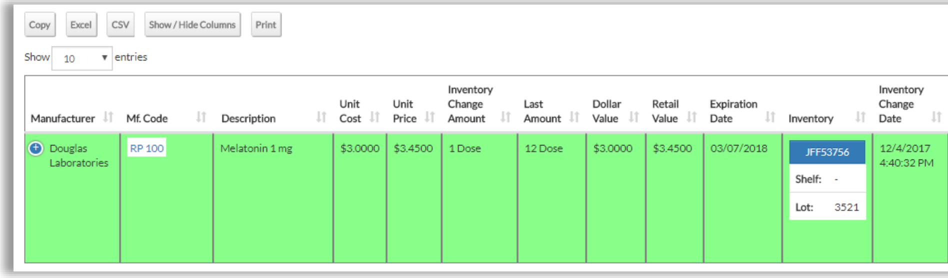
Important: Remove is not the same Scan Out, in which the dose is dispensed to a recipient

Doses are removed on the Transaction History Report. In addition, you can remove a dose and create an order for its replacement at the same time. Removed doses can be viewed on Dose Removal Report (see *Dose Removal Report*).

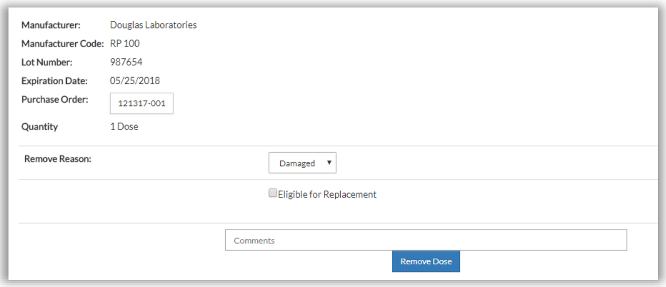
To Remove a Dose:

1. Go to Top Menu and click **Reports**, then **Transaction History**

2. Click in Search field and scan or type in dose tracking number, then press Enter
   System displays dose record



3. Click  to open the row, then click **Remove Dose**
   Popup appears



4. Select Remove Reason

5. Choose one:
   - Option 1: Remove Dose without ordering replacement
   - Option 2: Remove Dose and order replacement (see further below)

Option 1: Remove Dose Without Ordering Replacement

1. Provide Comments (required)

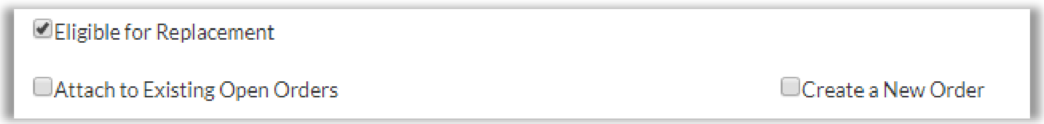
2. Click **Remove Dose**, then **Ok**
   System gives Success message

3. Close popup, and Transaction History screen refreshes

4. If you decide later to undo the removal, go to Dose Removal Report and follow the process there (see Dose Removal Report)

Option 2: Remove Dose and Order Replacement

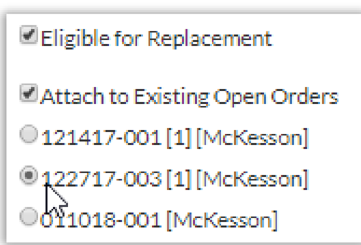
1. Click the box next to **Eligible for Replacement**
   Option boxes appear



2. Choose one:
   - Method 1: Attach to Existing Open Order
   - Method 2: Create a New Order

Method 1: Attach to Existing Open Order

a. Click **Attach to Existing Open Order**
b. Click circle for order to attach to

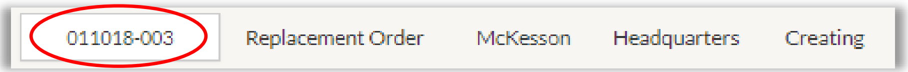


c. Provide Comments (required)

d. Click **Remove Dose & Attach to PO**, then **Ok**
   Dose is now removed from available Inventory

   Important: If you now cancel the purchase order, the dose is still removed from Inventory

e. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



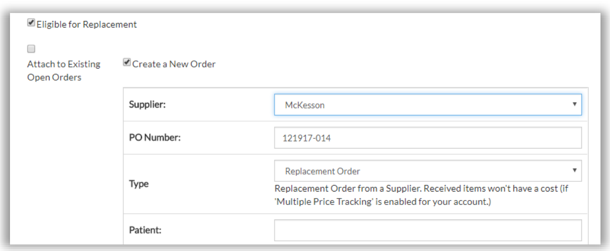
f. Click **Place Order With Confirmation Code Manually** (or click **Send PO to __ for approval**, if order is Purchase Order)

g. If you decide later to undo the removal, go to <u>Dose Removal Report</u> and follow the Unremove process there (see <u>Dose Removal Report</u>)

<u>Method 2: Create a New Order</u>

a. Click **Create a New Order**

Order fields appear



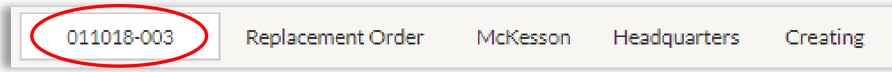
b. Set/populate fields:
- <u>Supplier</u> (required)
- <u>Type</u> – default is Replacement Order. Change if desired
- <u>Patient</u>
- <u>Comments</u> (required)

c. Click **Remove Dose & Attach to PO**, then **Ok**

Dose is now removed from available Inventory

<u>Important:</u> If you now to cancel the purchase order, the dose is <u>still</u> removed from Inventory

d. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



e. Click **Place Order With Confirmation Code Manually** (or click **Send PO to __ for approval**, if order is Purchase Order)

f. If you decide later to undo the removal, go to Dose Removal Report and follow the Unremove process there (see Dose Removal Report)

Update Product Details

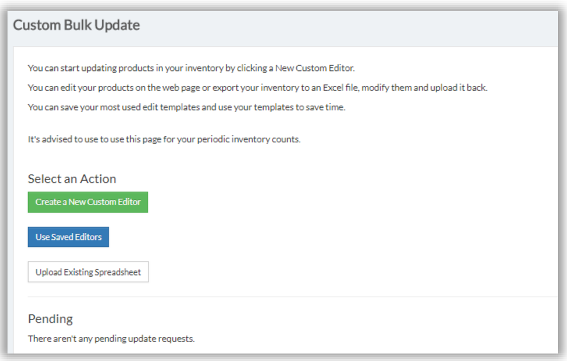
Update Multiple Products

Custom Bulk Update

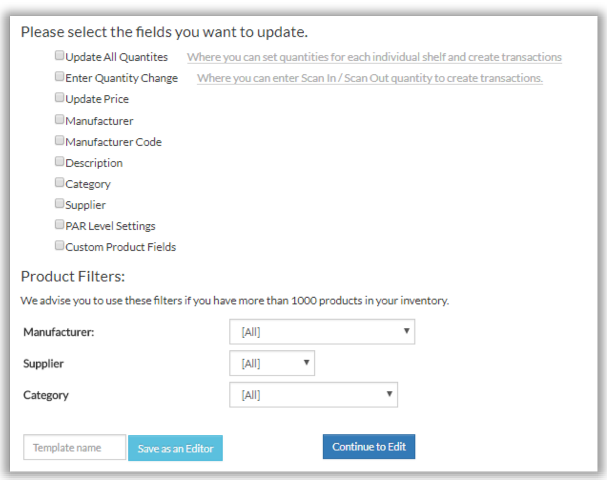
You can edit many items at once using Custom Bulk Update:

1. Go to Top Menu, click **Inventory Management**, then select **Custom Bulk Update**

   Custom Bulk Update Screen appears



2. Click **Create a New Custom Editor**, and fields appear



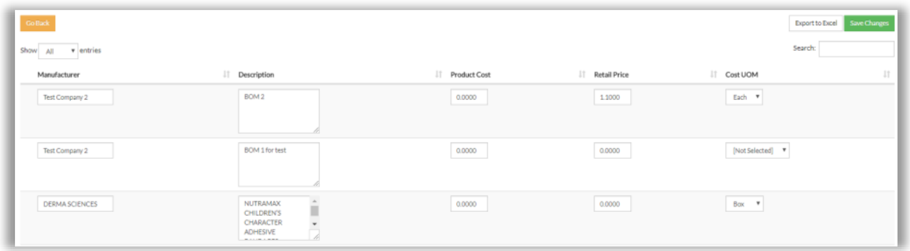
3. Check fields to update, then go down to <u>Product Filters</u> section and set filters

   *<u>Optional</u>: To save these selections as a convenient template for future bulk updates, provide <u>Template Name</u> and click **Save as an Editor**. Template will only save selections on this screen.*

4. Click **Continue**

   Live System Screen appears with the fields you selected

   Important: This is the <u>live system</u>. Any changes saved here will actually change the system



5. Make changes, then click **Save Changes**

   System gives Success message

Accept EDI Price Changes

Suppliers may notify ArbiMed of changes to their EDI order pricing. You can review these changes and decide whether the system should accept them

Note: To set up EDI Integration, please speak to your ArbiMed sales associate

To review and possibly accept EDI Price Changes:

1. Go to Top Menu, click **Inventory Management**, then **EDI Price Changes**

   EDI Price Changes Screen appears with recent supplier price changes

2. Review the changes, and:

   - If you want to accept them, check **Accept**, then click **Update My Prices**
   - If you don't want to accept them, do nothing

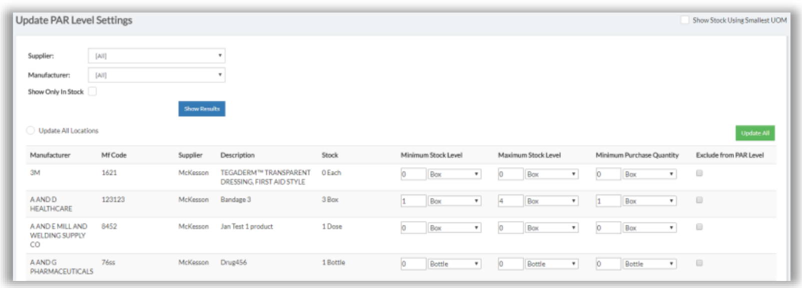
     Important: If you don't accept the changes, EDI orders for these products to that supplier will not be processed

Update PAR Levels

You can update PAR Levels for multiple products at once:

1. Go to Top Menu and click Settings, then PAR Levels

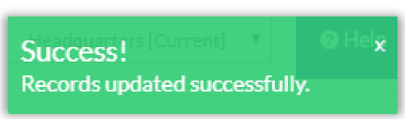
   Update PAR Level Settings screen appears



2. Use search fields or scroll down to find products to update

3. Make desired updates, then click **Update All**

   System gives Success message



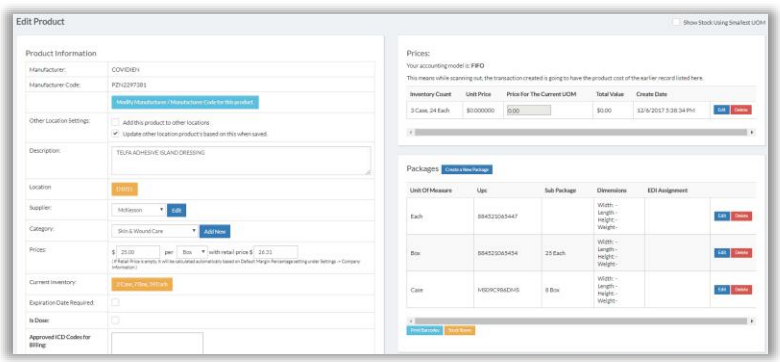
Update Single Product

Update Product Details: Overview

In general, you can update product details as follows:

1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Find product and click 

   Edit Product Screen appears



3. Edit product as needed, then click **Update Product**

> *<u>Alternate Method:</u>*
>
> *You can also edit manually created products from the Created Products List:*
>
> a. *Go to Top Menu, click **Inventory Management**, then **Created Products***
>
>   *Created Products List appears*
>
> b. *Find product and click **Edit***
>
> c. *Edit product as needed, then click **Update Product***

Update Purchase Price

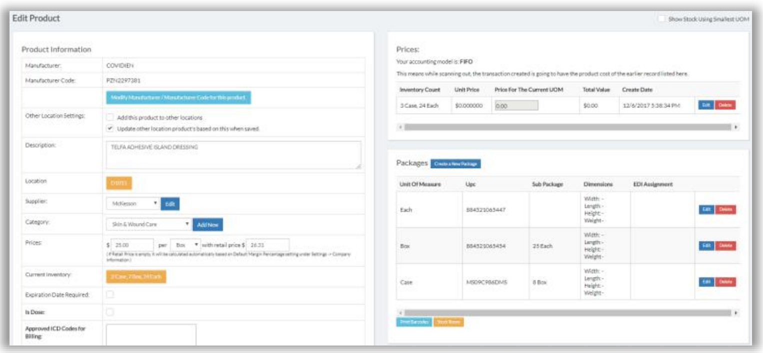
1. Go to Top Menu, click **Inventory Management**, then **Inventory List**
2. Locate item and click

   Alternate Method:

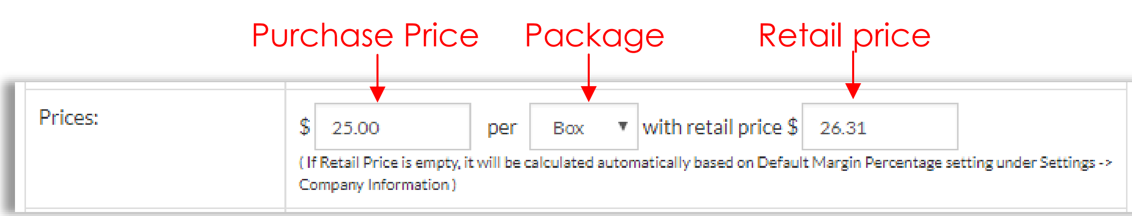
   a. *Go to Top Menu and click **Inventory Management**, then **Created Products List***

   b. *Find product and click*

Edit Product Screen appears



3. Go to lower left to Prices row and note the fields:



   a. Update Purchase Price and Package as needed

   b. Be sure also to update Retail Price

      System will not automatically update unless field is blank

4. Click **Update Product**, and New pricing is saved

   Under FIFO accounting, this means that:

   - New units scanned in will be assigned the new price
   - Old units scanned in with the old price will still scan out with the old price

Example:

You set price at $1 per Each, and then go to Stock Room and scan in an Each
If you return to Edit Product screen, the Prices box will show:

Inventory Count	Unit Price	Price For The Current UOM	Total Value	Create Date	
1 Each	$1.000000	1.00	$1.00	12/6/2017 6:10:13 PM	Edit Delete

Now suppose you change the price to $2, and scan in another Each
Prices box will now show:

Inventory Count	Unit Price	Price For The Current UOM	Total Value	Create Date	
1 Each	$1.000000	1.00	$1.00	12/6/2017 6:10:13 PM	Edit Delete
1 Each	$2.000000	2.00	$2.00	12/6/2017 6:16:32 PM	Edit Delete

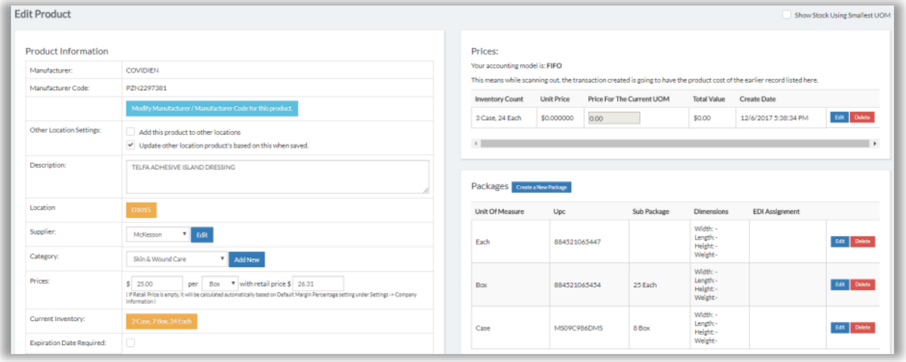
Only the second item is assigned the new price

Update Packages

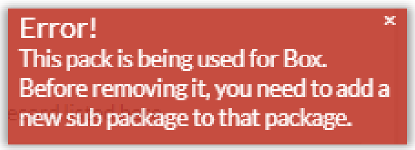
1. Access Edit Product Screen:
    a. Go to Top Menu, click **Inventory Management**, then **Inventory List**
    b. Locate item and click

    Alternate Method:
    *a. Go to Top Menu and click **Inventory Management**, then **Created Products List***
    b. Find product and click

    Edit Product Screen appears



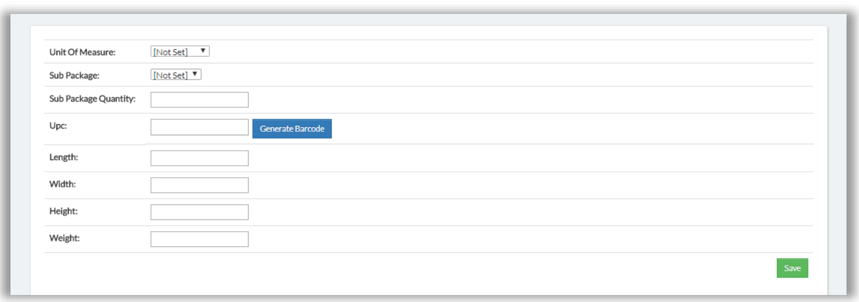
2. To delete a package, go to Packages section, locate package, then click **Delete**
    a. If you delete a package that is a sub unit of a greater package, system will give Error Message
    b. For instance, in the graphic above, if you were to delete Each, system would say:



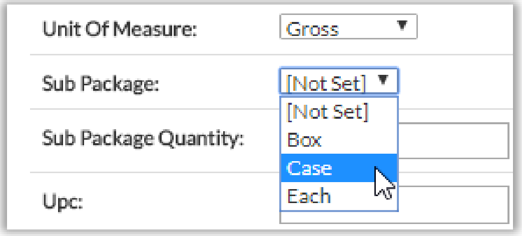
    c. This means you must specify a new sub package for Box
    d. To do so, go to Box and click **Edit**, choose a new sub package, then click **Update**

3. To create a package, click **Create a New Package**

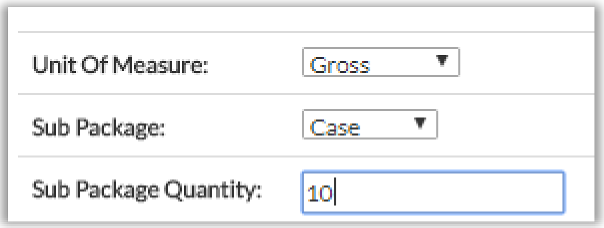
   Popup appears



    a. Select Unit of Measure
    b. Select Sub Package (recommended)



c. If you set Sub Package, you must also set Sub Package Count

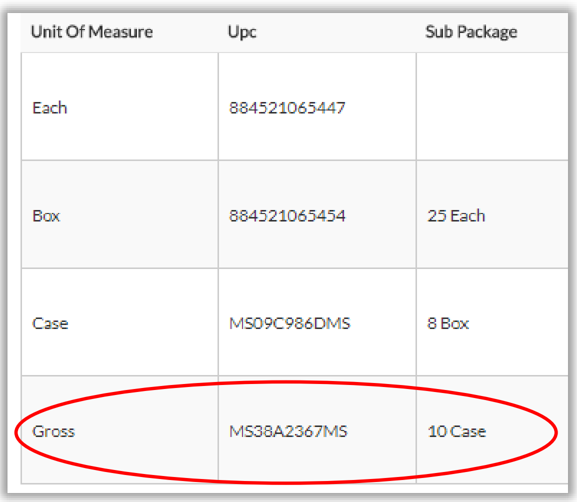


d. Scan / type in UPC, or click **Generate Barcode**

e. If you wish, provide Dimensions and Weight

f. Click **Save**

System shows new package



Unit Of Measure	Upc	Sub Package
Each	884521065447	
Box	884521065454	25 Each
Case	MS09C986DMS	8 Box
Gross	MS38A2367MS	10 Case

4. When done updating packages, click **Save**

Create New Shelves

When you create a new product, the system will dispense a default Shelf as "-". You can change this while creating the product, or you can do it now, as follows:

Important: In this process, Shelves are referred to as "Locations," but elsewhere in the system "Location" refers to the physical business address where you are receiving and/or dispensing products (see *Set Company Information*, Step 3)

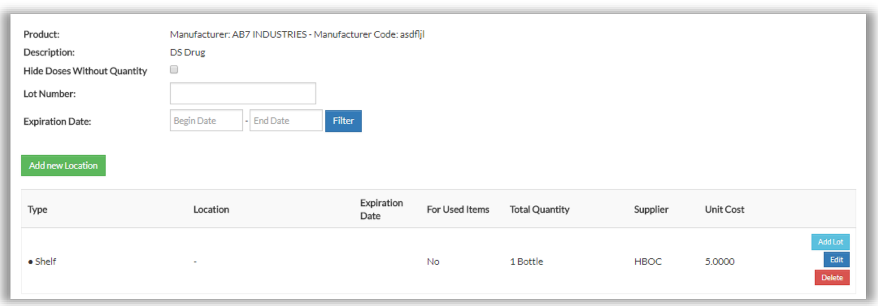
1. Go to Top Menu, click **Inventory Management,** then **Inventory List**
2. Go to Search field, type product name, and press Enter
   (Use other query fields as needed)
   Screen shows product

Mf. Code	Manufacturer	Cost	Cost UOM	Description	Supplier	In Stock
asdfljl	AB7 INDUSTRIES	$5.00	Bottle	DS Drug	HBOC	1 Bottle

3. Go to column In Stock and click square showing in-stock units:

   1 Bottle

   Popup appears

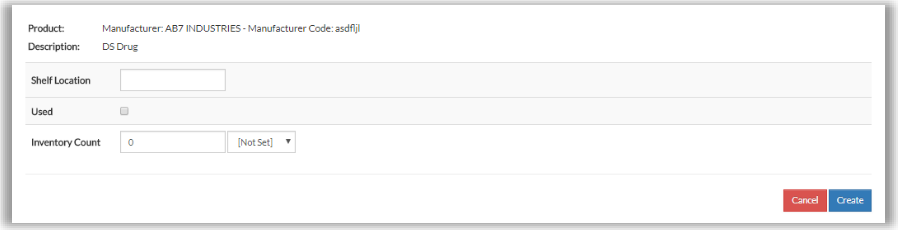


In column Location, screen shows existing default shelf "-"

Type	Location
• Shelf	-

4. Click **Add New Location**

   New Inventory Location popup appears



Product: Manufacturer: AB7 INDUSTRIES - Manufacturer Code: asdfljl
Description: DS Drug

Shelf Location

Used

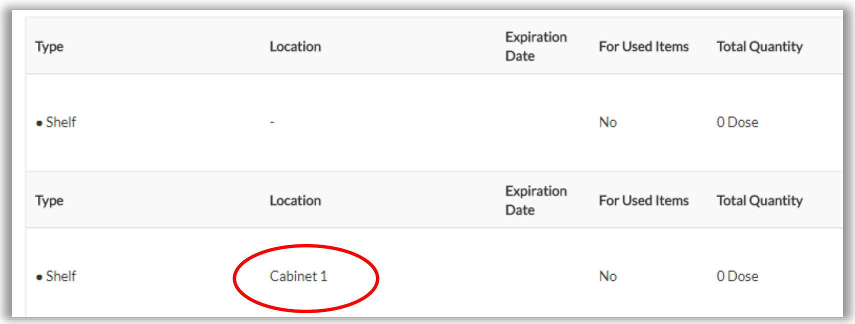
Inventory Count 0 [Not Set]

Cancel Create

5. Complete fields:
   - Shelf Location – Name the new shelf
   - Inventory Count
   - Inventory Count Package (the drop down menu) - Required

6. Click **Create**

   Inventory Locations screen appears displaying the new shelf



Type	Location	Expiration Date	For Used Items	Total Quantity
• Shelf	-		No	0 Dose

Type	Location	Expiration Date	For Used Items	Total Quantity
• Shelf	Cabinet 1		No	0 Dose

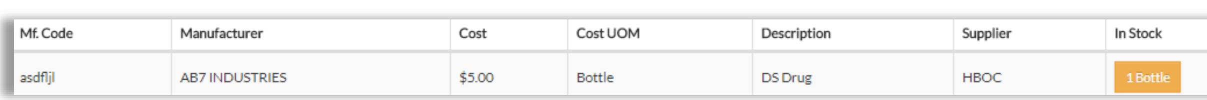
Create New Lots

You can create lots as subdivisions for any shelf

1. Go to Top Menu, click **Inventory Management,** then **Inventory List**
2. Go to Search field, type product name, and press Enter

   (Use other query fields as needed)

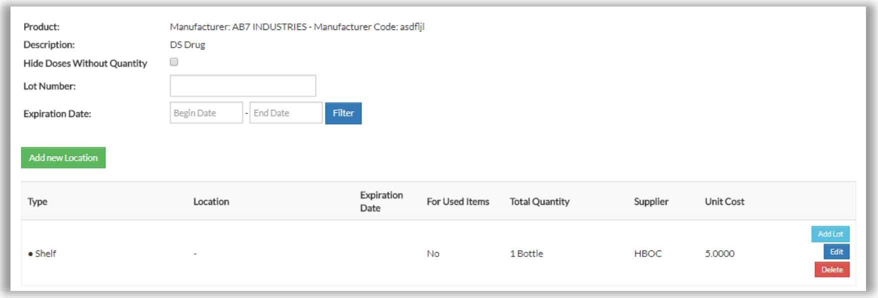
   Screen shows product



Mf. Code	Manufacturer	Cost	Cost UOM	Description	Supplier	In Stock
asdfljl	AB7 INDUSTRIES	$5.00	Bottle	DS Drug	HBOC	1 Bottle

3. Go to column In Stock and click square showing in-stock units:

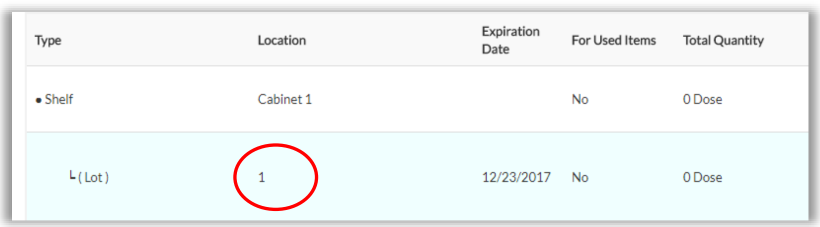
Popup appears



4. Scroll down and find desired shelf
5. Click **Add Lot** and complete the fields

   For Lot Number, you can set an expiration date
6. Click **Create**

   Screen shows Shelf with the new Lot

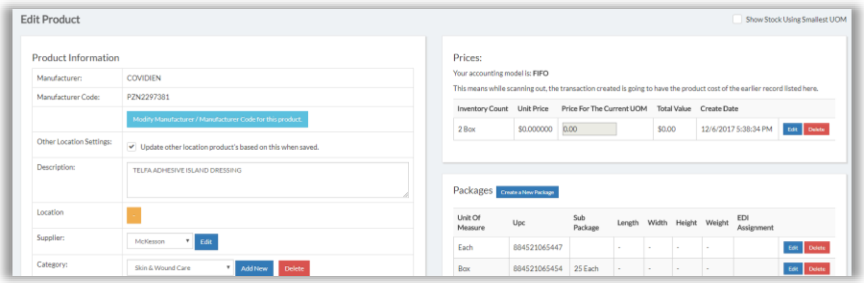


Update PAR Levels

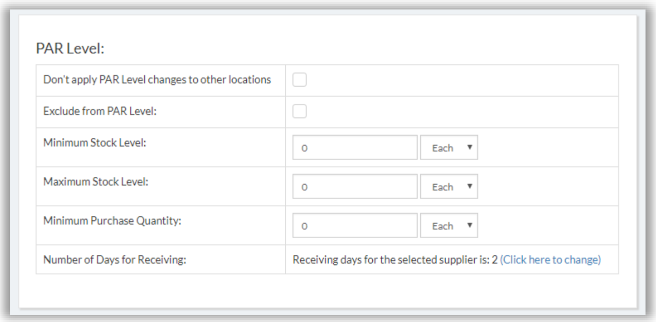
From time to time you may want to update PAR Levels to better reflect product usage trends in your practice or facility

1. Go to Top Menu, click **Inventory Management,** then **Inventory List**
2. Locate product and click 

   Edit Product screen appears



3. Go to lower left to PAR Level box



4. Complete fields as desired:
   - <u>Exclude from PAR Level</u> – Check this box if you do not want PAR Level to apply to this product
   - <u>Minimum Stock Level</u> – will be PAR Level Report's Suggested Purchase Quantity, if it is greater than future sales estimate
   - <u>Maximum Stock Level</u> –will be PAR Level Report's Suggested Purchase Quantity, if it is less than future sales estimate
   - <u>Minimum Purchase Quantity</u> – Set this to supplier minimum quantity, to ensure PAR Level Report's Suggested Purchase Quantity matches

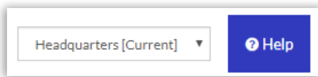
5. Go to right and click **Update Product**

View Reports and Data

Reports Overview

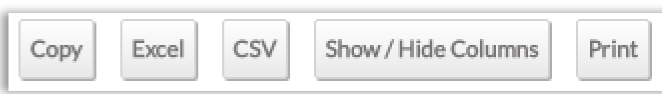
Various reports are available. Many have the same data viewing features:

- To change location, go to upper right and use drop-down menu:



- Click arrows icons to sort fields:

- Click  to view more details , click  to close
- Click  to edit details
- Button menu:



  - **Copy** means system will copy the entire report table, which you can then paste where you choose
  - **CSV** means system will create a Comma Separated Value file, which will download automatically to your computer
  - **Show/Hide Columns** lets you hide or show selected columns from the report. These settings will be preserved even if you close the browser

Dose-Related Reports

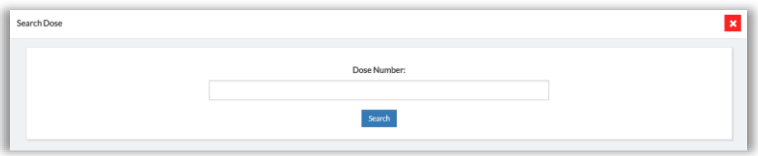
Search Dose

If your system build has Dose Tracking, this report lets you query and view information for tracked doses

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

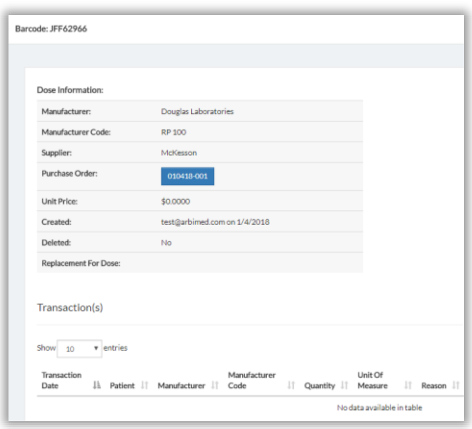
1. Go to Top Menu, click **Inventory Management,** then **Search Dose**

   Popup appears



2. Provide Dose Number, then click **Search**

   System provides dose details



3. Go to Purchase Order row and click box

   System will show original purchase order, and from there you can print Dose Barcodes; process is same as with Dose Transactions Report (see Dose Transactions: Print Barcodes for Tracked Doses)

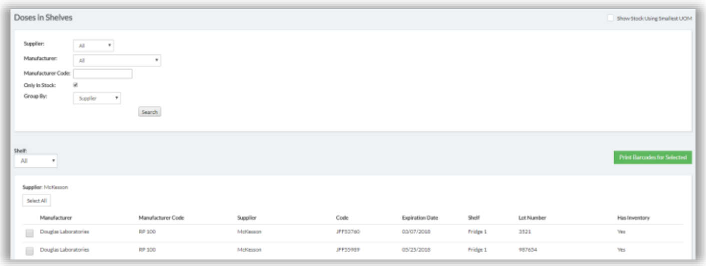
Doses In Shelves

If your system build supports Dose Tracking, this report lets you view and print Dose Barcodes

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

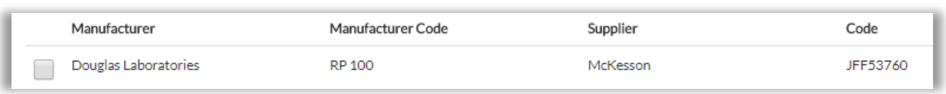
1. Go to Top Menu, click **Inventory Management**, then **Doses in Shelves**

   Report screen appears



2. Populate search fields, including <u>Shelf</u>, then click **Search**

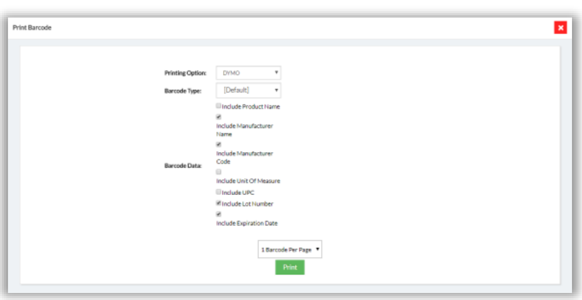
   System shows results



   The column <u>Code</u> is the Dose Number

3. Check the box for the dose(s) to print, then go to right and click **Print Barcodes for Selected**

   Print popup appears



4. Set / check fields as desired, then click **Print**
5. Browser downloads barcode pdf, which you can print

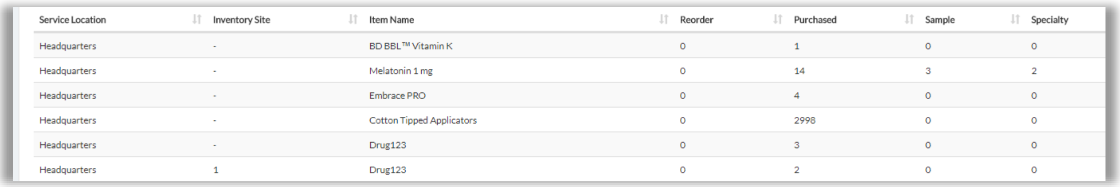
Current Dose Inventory

If your system build has Dose Tracking, this report shows quantities of tracked doses in your Inventory

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

1. Go to Top Menu and click **Reports**, then **Current Dose Inventory**

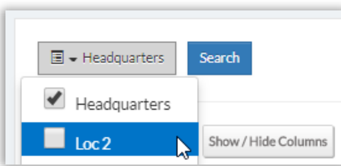
   Report screen appears



Service Location	Inventory Site	Item Name	Reorder	Purchased	Sample	Specialty
Headquarters	-	BD BBL™ Vitamin K	0	1	0	0
Headquarters	-	Melatonin 1 mg	0	14	3	2
Headquarters	-	Embrace PRO	0	4	0	0
Headquarters	-	Cotton Tipped Applicators	0	2998	0	0
Headquarters	-	Drug123	0	3	0	0
Headquarters	1	Drug123	0	2	0	0

   - Service Location = Physical address where you receive and dispense items
   - Inventory Site = Shelf

2. Use drop-down menu to change Service Location if needed



3. Go to right to Search box and type Item Name, Service Location, or Inventory site

   Screen will automatically show search results

Dose Transactions

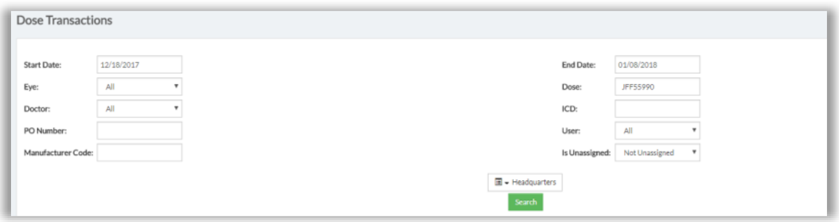
If your system build supports Dose Tracking, this report shows dose transaction history, and also allows you to Undispense doses and print dose barcodes

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Undispense Doses

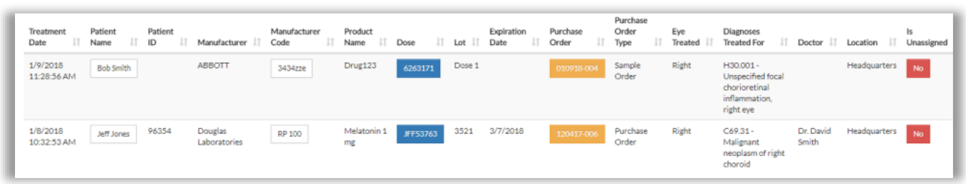
1. Go to Top Menu and click **Reports**, then **Dose Transactions**

   Report screen appears



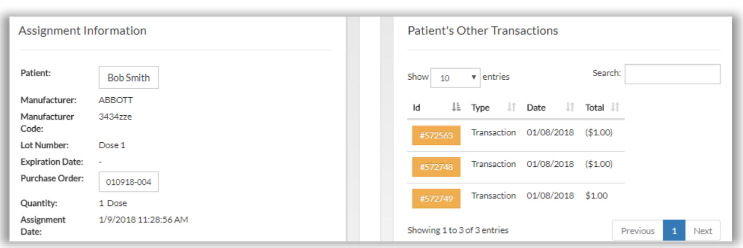
2. Populate search fields, then click **Search**

   Matching transaction(s) appear



3. Go to column <u>Is Unassigned</u> and click “No” box

   Popup appears



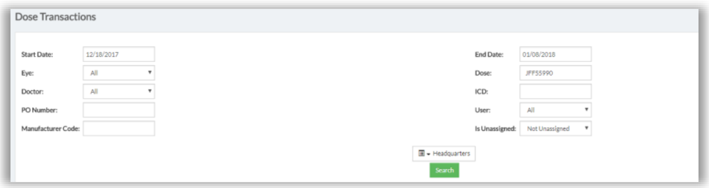
4. Scroll down and click **Unassign Dose & Scan Back In**, then **Ok**

   System gives Success message

Print Barcodes for Tracked Doses

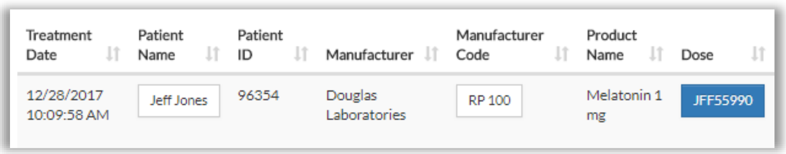
1. Go to Top Menu and click **Reports**, then **Dose Transactions**

   Report screen appears

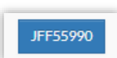


2. Populate search fields, then click **Search**

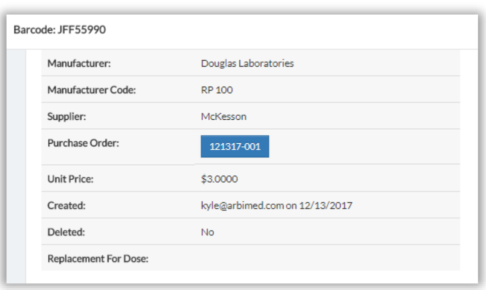
   Matching transaction(s) appear



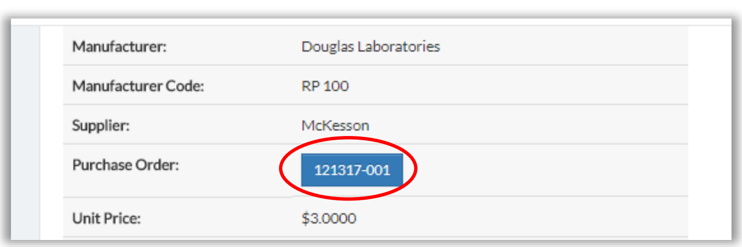
3. Go to column <u>Dose</u> and click box containing Dose Number



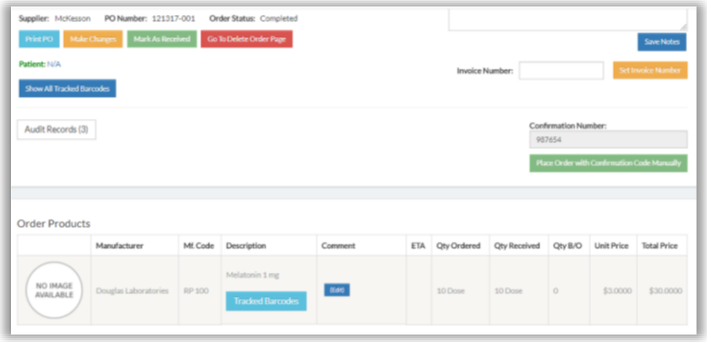
   Dose Info Popup appears



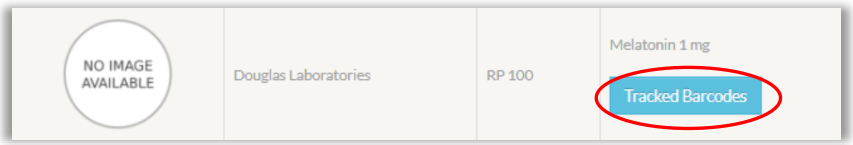
4. In grey table at top, go to row **Purchase Order** and click box showing the order number



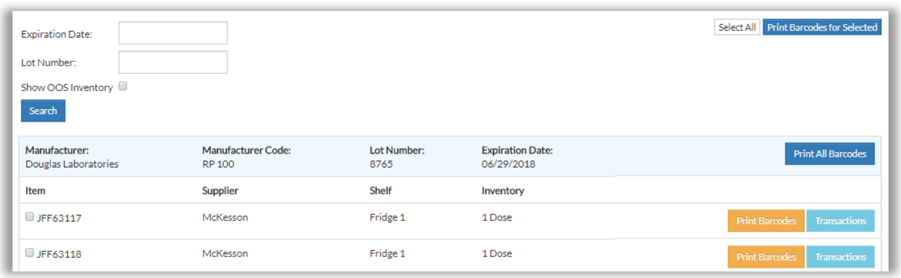
Order details appear



5. Locate tracked dose product and click **Tracked Barcodes**

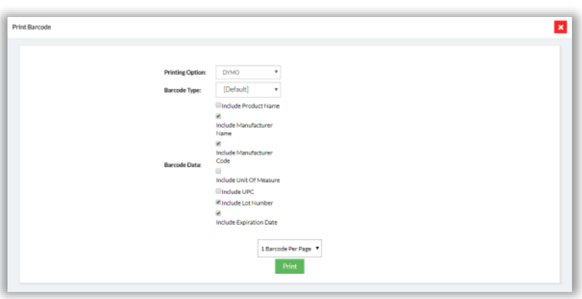


Popup appears with Dose Numbers



6. Check the boxes for the doses to print, then go to upper right and click **Print Barcodes for Selected**

   Print popup appears



7. Check or uncheck fields as desired, then click **Print**
8. Browser downloads barcode pdf, which you can print

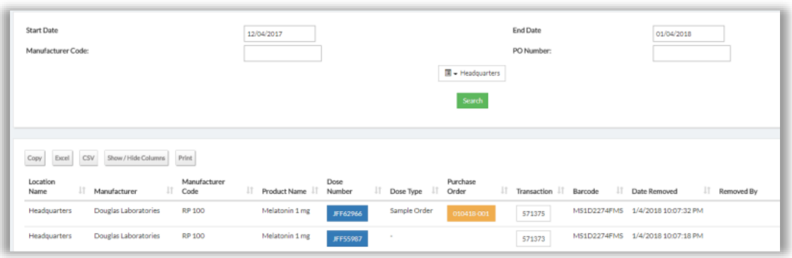
Dose Removal Report

If your system build has Dose Tracking, this report shows removed doses, and also allows you to edit and cancel the Removal. For more information on Dose Removal, see Remove Doses)

Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

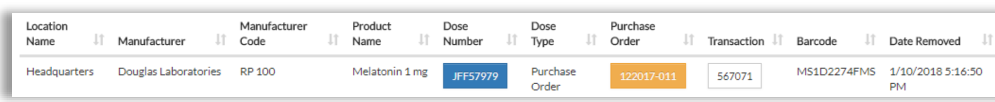
1. Go to Top Menu and click **Reports**, then **Dose Removal Report**

   Report appears



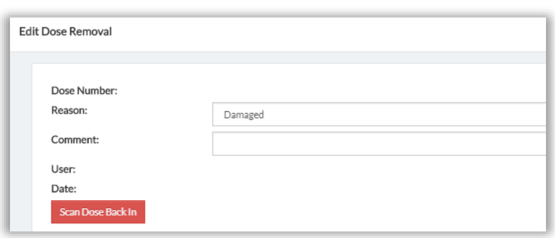
2. Populate search fields, then click **Search**

   System returns search results



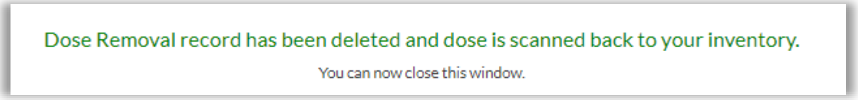
3. To view dose's transaction history, go to Dose Number column and click box
4. To view dose's original order, go to Purchase Order column and click box
5. To Unremove a dose, go to right and click **Edit**

   Popup appears



6. Review information, then click **Scan Dose Back In**

System gives Success message



Dose is now returned to available Inventory

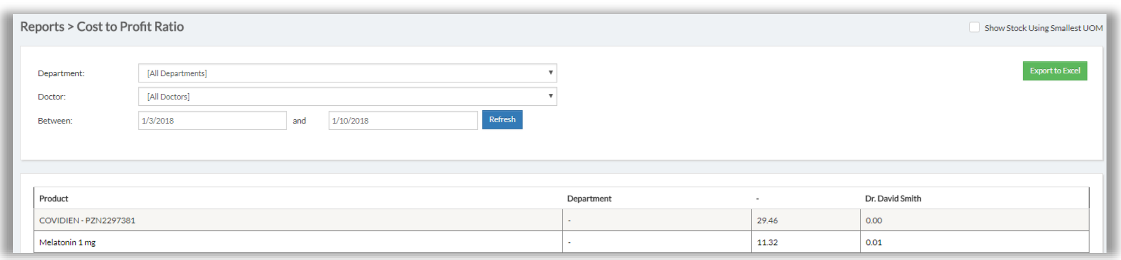
7. Close popup, then refresh screen

Cost, Quantity, and Profit Reports

Cost to Profit Ratio

1. Go to Top Menu and click **Reports**, then **Cost to Profit Ratio**

   Report screen appears



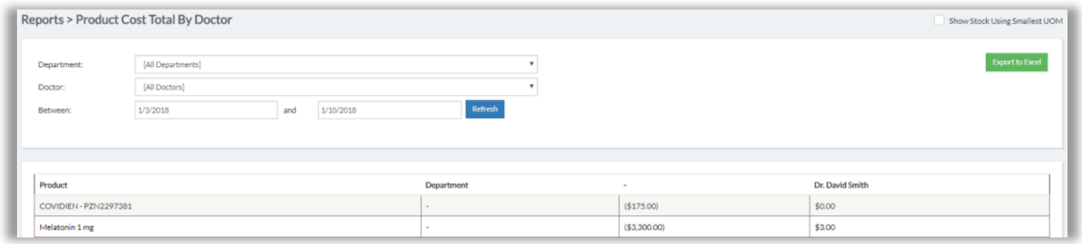
2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - Start Date one week before current date

3. Set fields as desired, then click **Refresh**

Product Cost Total By Doctor

1. Go to Top Menu and click **Reports**, then **Product Cost Total By Doctor**

   Report screen appears



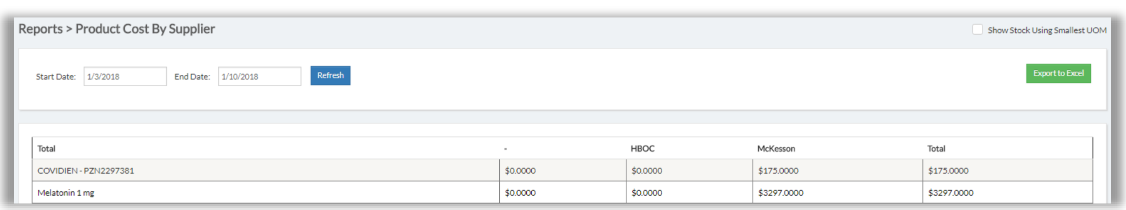
2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - Start Date one week before current date

3. Set fields as desired, then click **Refresh**

Product Cost By Supplier

1. Go to Top Menu and click **Reports**, then **Product Cost By Supplier**

   Report screen appears

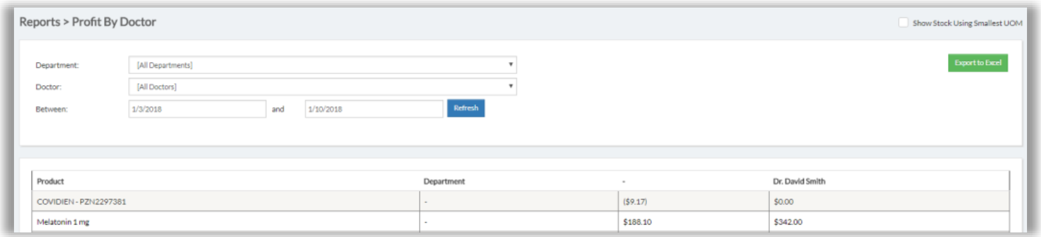


2. Data is for default Start Date one week before current date
3. Set Start Date as desired, then click **Refresh**

Profit By Doctor

1. Go to Top Menu and click **Reports**, then **Profit By Doctor**

   Report screen appears



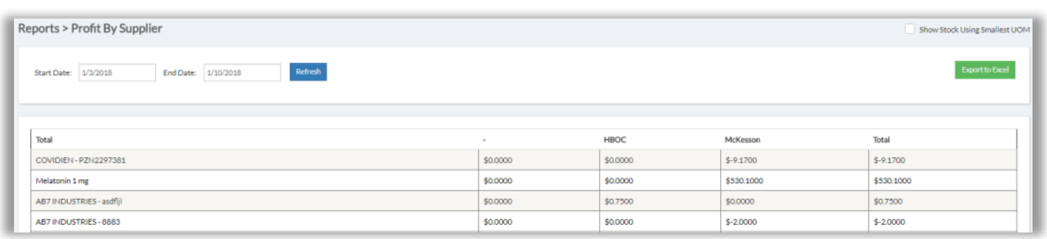
2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - Start Date one week before current date

3. Set fields as desired, then click **Refresh**

Profit By Supplier

1. Go to Top Menu and click **Reports**, then **Profit By Supplier**

   Report screen appears

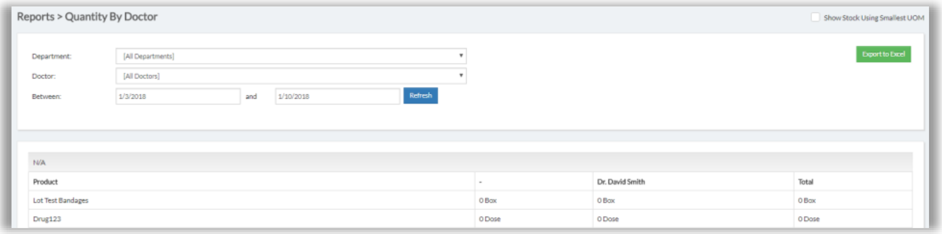


2. Data is for default Start Date one week before current date
3. Set Start Date as desired, then click **Refresh**

Quantity By Doctor

1. Go to Top Menu and click **Reports**, then **Quantity By Doctor**

   Report screen appears

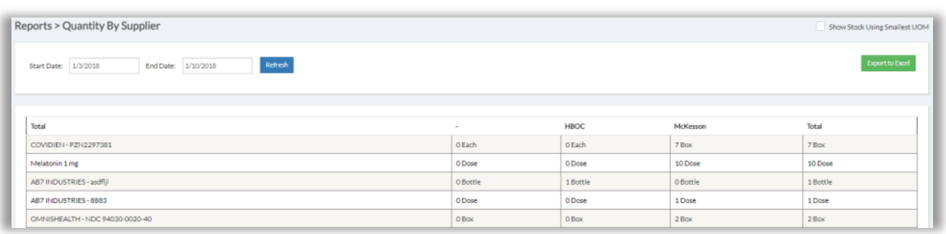


2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - Start Date one week before current date
3. Set fields as desired, then click **Refresh**

Quantity By Supplier

1. Go to Top Menu and click **Reports**, then **Quantity By Supplier**

   Report screen appears



2. Data is for default Start Date one week before current date
3. Set Start Date as desired, then click **Refresh**

Other Reports

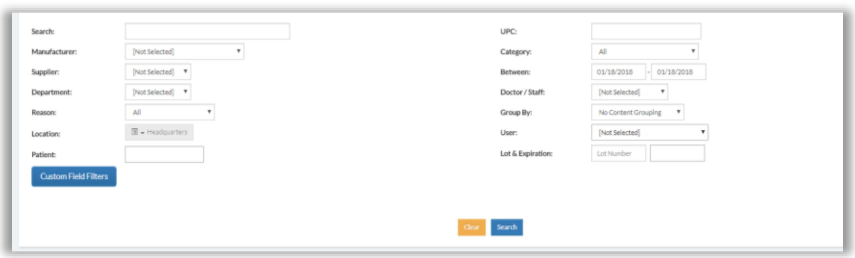
Transaction History

This report shows Scan In or Out activity, and also you to Undispense items. It also allows you to Undispense and remove doses, if your system build has Dose Tracking
Note: Contact your ArbiMed sales associate if you wish to set up Dose Tracking

Search for Transactions

1. Go to Top Menu and click **Reports**, then **Transaction History**

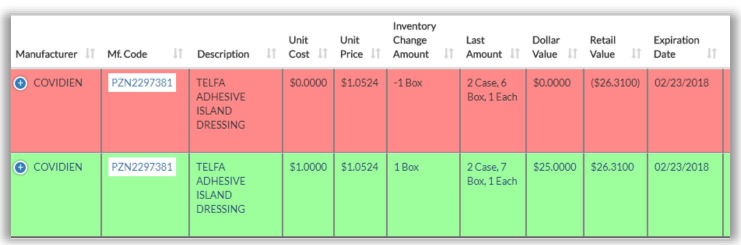
   Report screen appears



2. Populate <u>Search</u> box with product name, dose number or manufacturer code; or populate other search fields as desired

3. Click **Search**

   System displays transactions



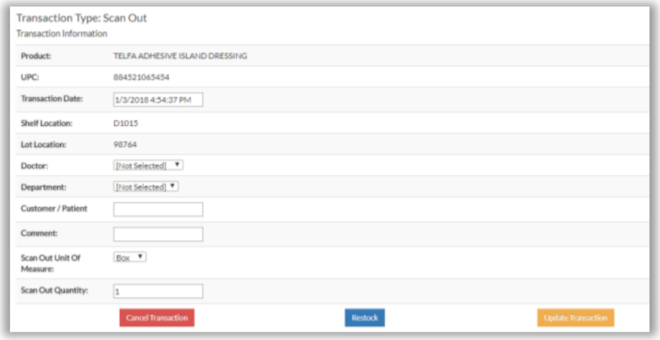
Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	$0.0000	$1.0524	-1 Box	2 Case, 6 Box, 1 Each	$0.0000	($26.3100)	02/23/2018
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	$1.0000	$1.0524	1 Box	2 Case, 7 Box, 1 Each	$25.0000	$26.3100	02/23/2018

- Red means "Scanned Out"
- Green means "Scanned In"
- To view record details, click 

Undispense Non-Dose Item

1. Search for transactions (see above), locate transaction you want, then click to open the row
2. Click

   Popup appears



3. Click **Cancel Transaction**, then **Ok**

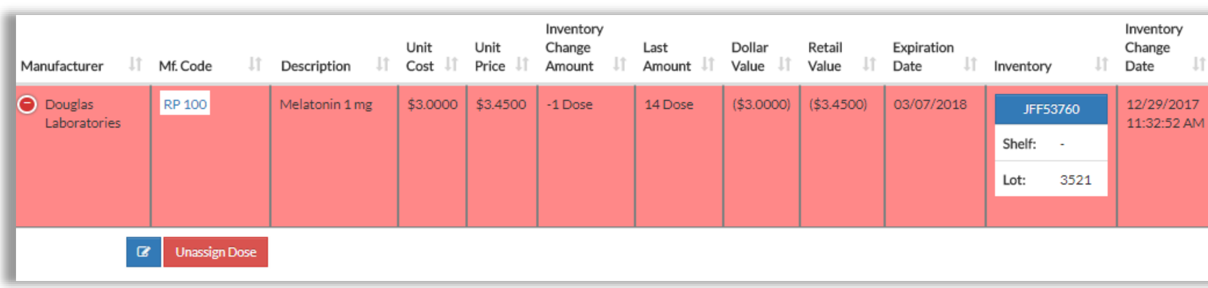
   System gives Success message

4. Close popup

Undispense Dose

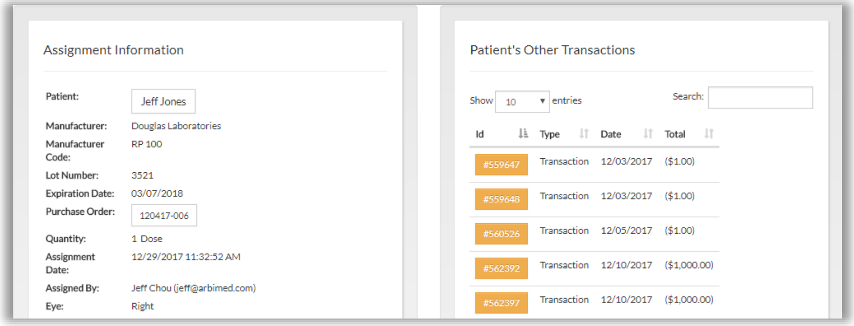
1. Search for Transactions (see above), locate transaction you want, then click to open the row

   Screen shows:



2. Click **Unassign Dose**

   Popup appears



3. Scroll down and provide Comments (required)

4. Click **Undispense Dose and Scan Back In**, then **Ok**

   System gives Success message

5. Close popup, and screen refreshes and shows a green row for the dose, indicating "Scan In" (i.e. dose now returned to Inventory)

Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
Douglas Laboratories	RP 100	Melatonin 1 mg	$3.0000	$3.4500	1 Dose	17 Dose	$3.0000	$3.4500	03/07/2018	JFF53760 Shelf: - Lot: 3521	1/3/2018 5:10:28 PM
Douglas Laboratories	RP 100	Melatonin 1 mg	$3.0000	$3.4500	-1 Dose	14 Dose	($3.0000)	($3.4500)	03/07/2018	JFF53760 Shelf: - Lot: 3521	12/29/2017 11:32:52 AM

   The red row still exists as a record of the Dispense (note date and time on the right)

Remove Dose

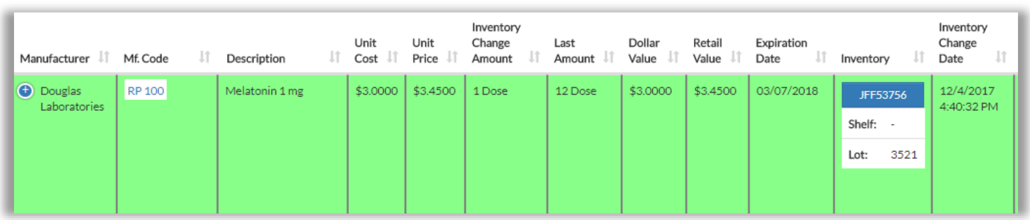
"Remove" refers to deleting from the Inventory a tracked dose that is damaged, expired or otherwise not fit for use.

Important: Remove is not the same Scan Out, in which the dose is dispensed to a recipient

You can remove a dose and create an order for its replacement at the same time. Removed doses can be viewed on Dose Removal Report (see *Dose Removal Report*)

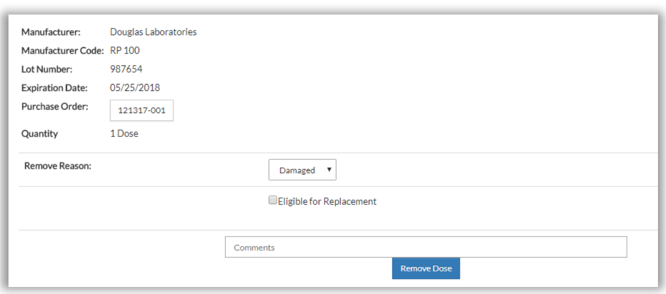
To Remove a Dose:

1. Go to Top Menu and click **Reports**, then **Transaction History**
2. Click in Search field and scan or type in dose tracking number, then press Enter
   System displays dose record



Manufacturer	Mf. Code	Description	Unit Cost	Unit Price	Inventory Change Amount	Last Amount	Dollar Value	Retail Value	Expiration Date	Inventory	Inventory Change Date
Douglas Laboratories	RP 100	Melatonin 1 mg	$3.0000	$3.4500	1 Dose	12 Dose	$3.0000	$3.4500	03/07/2018	JFF53756 Shelf: - Lot: 3521	12/4/2017 4:40:32 PM

3. Click  to open the row, then click **Remove Dose**
   Popup appears



Manufacturer: Douglas Laboratories
Manufacturer Code: RP 100
Lot Number: 987654
Expiration Date: 05/25/2018
Purchase Order: 121317-001
Quantity 1 Dose
Remove Reason: Damaged
Eligible for Replacement
Comments
Remove Dose

4. Select Remove Reason

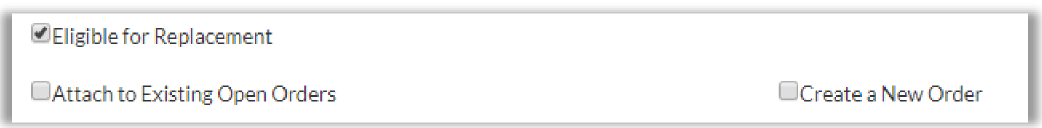
5. Choose one:
   - Option 1: Remove Dose without ordering replacement
   - Option 2: Remove Dose and order replacement (see further below)

Option 1: Remove Dose Without Ordering Replacement

1. Provide Comments (required)
2. Click **Remove Dose**, then **Ok**
3. System gives Success message. Close popup, and Transaction History screen refreshes
4. If you wish to undo the removal, go to Dose Removal Report and follow the Unremove process there (see Dose Removal Report)

Option 2: Remove Dose and Order Replacement

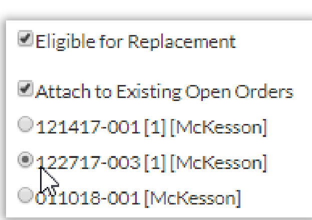
1. Click the box next to **Eligible for Replacement**
   Option boxes appear



2. Choose one:
   - Method 1: Attach to Existing Open Order
   - Method 2: Create a New Order

Method 1: Attach to Existing Open Order

a. Click **Attach to Existing Open Order**
b. Click circle for order to attach to



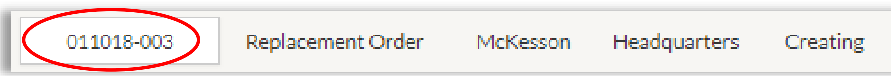
c. Provide Comments (required)

d. Click **Remove Dose & Attach to PO**, then **Ok**

Dose is now removed from available Inventory

Important: If you now cancel the purchase order, the dose is still removed from Inventory

e. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



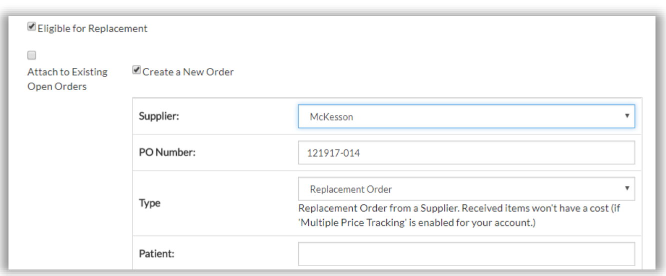
f. Click **Place Order With Confirmation Code Manually** (or click **Send PO to __ for approval**, if order is Purchase Order)

g. If you wish to undo the removal, go to Dose Removal Report and follow the Unremove process there (see Dose Removal Report)

Method 2: Create a New Order

a. Click **Create a New Order**

Order fields appear



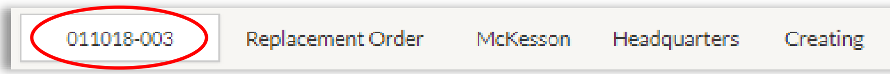
b. Set/populate fields:
- Supplier (required)
- Type – default is Replacement Order. Change if desired
- Patient
- Comments (required)

c. Click **Remove Dose & Attach to PO**, then **Ok**

Dose is now removed from available Inventory

<u>Important:</u> If you now cancel the purchase order, the dose is <u>still</u> removed from Inventory

d. To finish ordering replacement dose, go to Purchase Orders module, find order, and click its order number



e. Click **Place Order With Confirmation Code Manually** (or click **Send PO to __ for approval**, if order is Purchase Order)

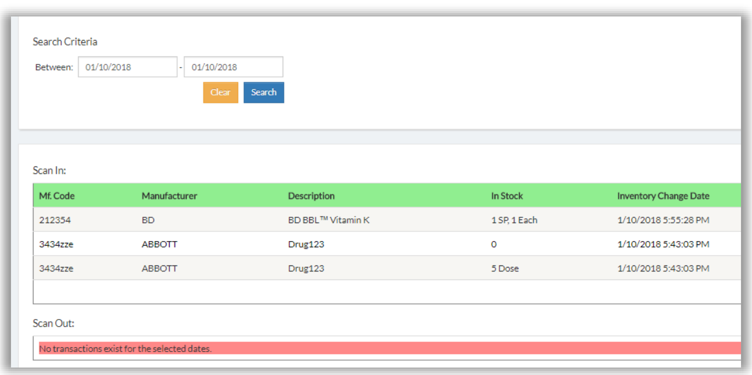
f. If you wish to undo the removal, go to <u>Dose Removal Report</u> and follow the Unremove process there (see <u>Dose Removal Report</u>)

Inventory History

This report shows basic inventory change history, and allows date-range searching

1. Go to Top Menu and click **Reports**, then **Inventory History**

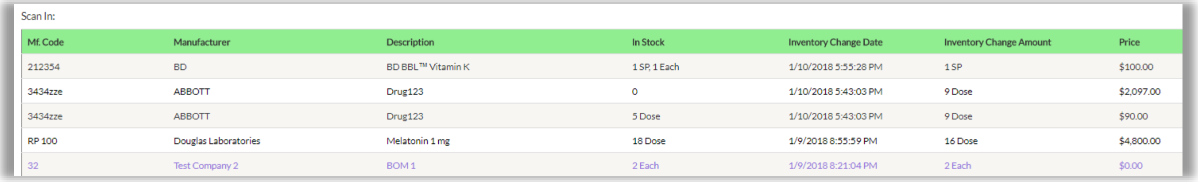
   Report screen appears



   As elsewhere, green indicates "Scan In," and red indicates "Scan Out"

2. Set date range to search, then click **Search**

System returns results



Mf. Code	Manufacturer	Description	In Stock	Inventory Change Date	Inventory Change Amount	Price
212354	BD	BD BBL™ Vitamin K	1 SP, 1 Each	1/10/2018 5:55:28 PM	1 SP	$100.00
3434zze	ABBOTT	Drug123	0	1/10/2018 5:43:03 PM	9 Dose	$2,097.00
3434zze	ABBOTT	Drug123	5 Dose	1/10/2018 5:43:03 PM	9 Dose	$90.00
RP 100	Douglas Laboratories	Melatonin 1 mg	18 Dose	1/9/2018 8:55:59 PM	16 Dose	$4,800.00
32	Test Company 2	BOM 1	2 Each	1/9/2018 8:21:04 PM	2 Each	$0.00

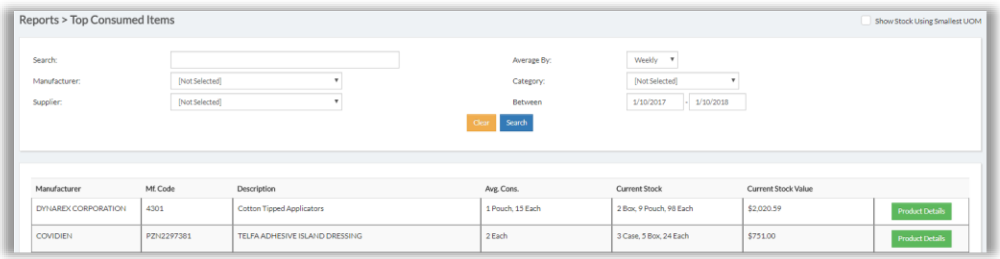
Items in purple have no price

Top Consumed Items

This report shows average consumption, current stock and current stock values for products in Inventory. Average consumption can be calculated Daily, Weekly, Monthly and Yearly.

1. Go to Top Menu and click **Reports**, then **Top Consumed Items**

   Report screen appears



Manufacturer	Mf. Code	Description	Avg. Cons.	Current Stock	Current Stock Value	
DYNAREX CORPORATION	4301	Cotton Tipped Applicators	1 Pouch, 15 Each	2 Box, 9 Pouch, 98 Each	$2,020.59	Product Details
COVIDIEN	PZN2297381	TELFA ADHESIVE ISLAND DRESSING	2 Each	3 Case, 5 Box, 24 Each	$751.00	Product Details

2. Set search fields, then click **Search**

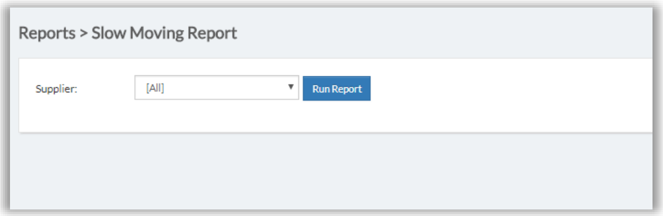
3. To edit item details:
   a. Go to right and click **Product Details**
   b. Make changes and click **Update Product**

Slow Moving Report

This report shows in-stock products that are slow to be Dispensed or Reserved

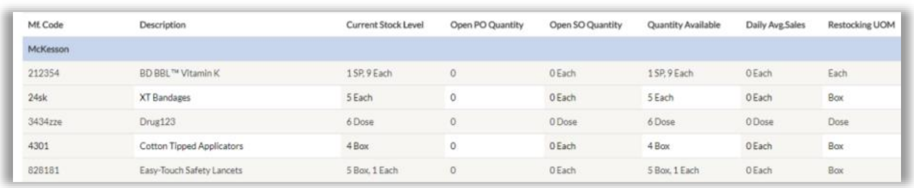
1. Go to Top Menu and click **Reports**, then **Slow Moving Report**

   Report screen appears



2. Select <u>Supplier</u>, then click **Run Report**

   Data appears



Mf. Code	Description	Current Stock Level	Open PO Quantity	Open SO Quantity	Quantity Available	Daily Avg.Sales	Restocking UOM
McKesson							
212354	BD BBL™ Vitamin K	1 SP, 9 Each	0	0 Each	1 SP, 9 Each	0 Each	Each
24sk	XT Bandages	5 Each	0	0 Each	5 Each	0 Each	Box
3434zze	Drug123	6 Dose	0	0 Dose	6 Dose	0 Dose	Dose
4301	Cotton Tipped Applicators	4 Box	0	0 Each	4 Box	0 Each	Box
828181	Easy-Touch Safety Lancets	5 Box, 1 Each	0	0 Each	5 Box, 1 Each	0 Each	Box

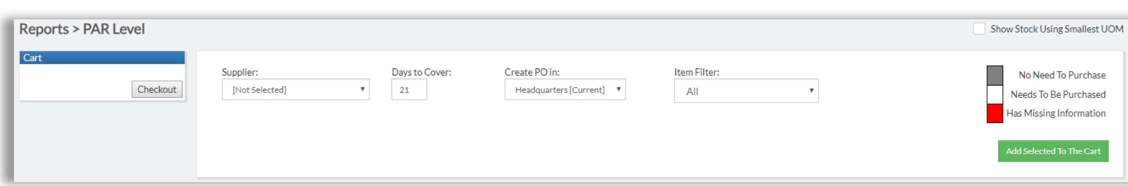
3. To view data for another supplier, select their name and click **Run Report**

PAR Levels Report

This report calculates real-time estimated item usage and estimated future usage, then tells you how much to order. The report also lets you order items.

1. Go to Top Menu and click Reports, then **PAR Levels Report**

   Report screen appears



2. Select Supplier

   System displays items

- Grey = No Need to Purchase
- White = Needs to be Purchased
- Red = Missing Information
  - Click **Expand** to review, then go to Inventory List and edit product

3. If you wish, set Item Filter to the color code you want to see

Order Items

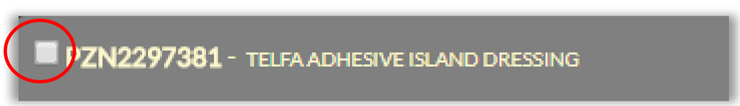
The PAR Levels Report also lets you order items

To order items, choose one:

- Option 1: Add Multiple Items to Order
- Option 2: Add Single Item to Order

Option 1: Add Multiple Items to Order

1. White rows are already checked; uncheck if desired
2. To add additional items, check the box for the item you wish to add. For example:



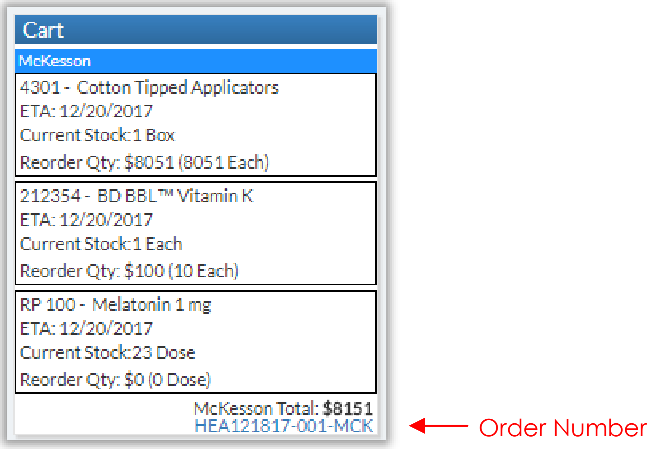
3. Click **Add Selected to the Cart**

   All checked items are added to Cart (upper left)

4. Add other items as needed. If desired, search other suppliers

5. Click **Checkout**, then **Ok**

   Cart appears showing item(s) with Order Number



   If ordering from multiple suppliers, system will create a different order for each one

6. If you ordered Grey items, they will not have quantities

   To add quantities:

   a. Go to Top Menu, click **Procurement**, then **Purchase Orders**
   b. Locate the order, open it, and provide the quantities
   c. Place order

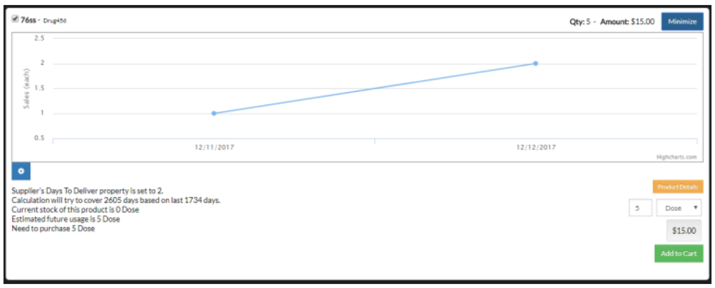
Option 2: Add Single Item to Order

You can order white row and grey row items

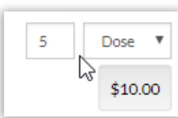
Order White Row Item

1. Locate item to order and click **Expand**

   Item detail appears

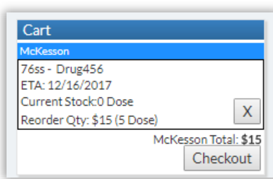
   

2. Go to lower right and adjust quantity and package if necessary

3. Click **Add to Cart**

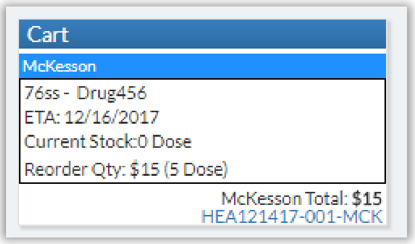
   Item appears in Cart at upper left

4. Add other items as desired

5. When ready, click **Checkout**, then **Ok**

   Cart appears showing item(s) with Order Number



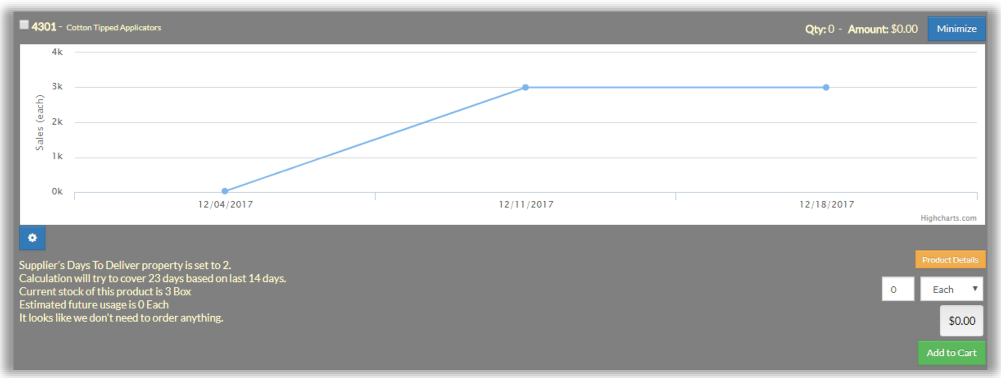
Order Number

If ordering from multiple suppliers, system will create a different order for each one

Order Grey Row Item

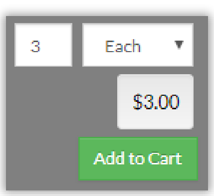
1. Locate item to order and click **Expand**

   Item detail appears



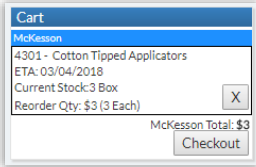
2. Select package; then click in quantity box and enter desired amount, and press Enter

   System calculates total quantity cost



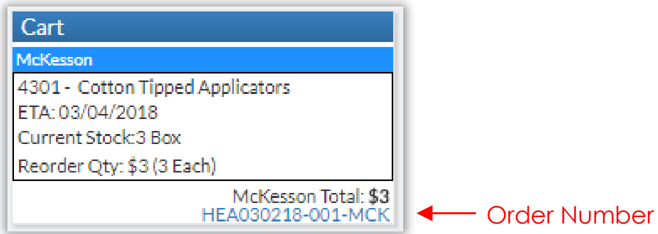
3. Click **Add to Cart**

   Item appears in Cart at upper left



4. Add other items as desired
5. When ready, click **Checkout**, then **Ok**

   Cart appears showing item(s) with Order Number

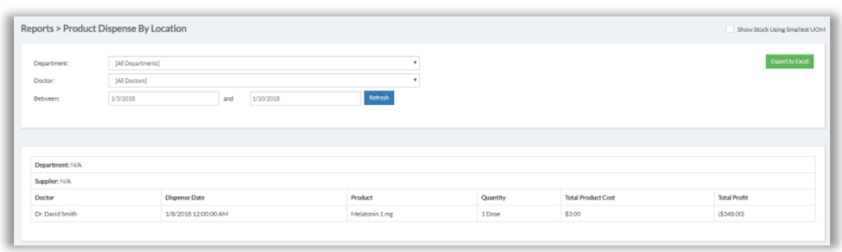


   If ordering from multiple suppliers, system will create a different order for each one

Product Dispense By Location

1. Go to Top Menu and click **Reports**, then **Product Dispense By Location**

   Report screen appears

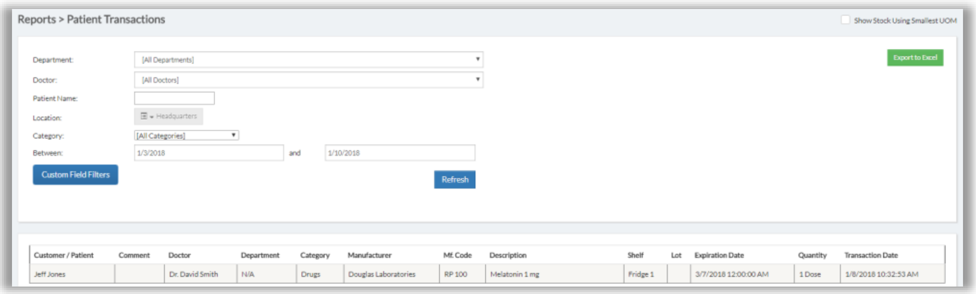


2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - Start Date one week before current date
3. Set fields as desired, then click **Refresh**

Patient Transactions

1. Go to Top Menu and click **Reports**, then **Patient Transactions**

   Report screen appears



2. Data is for default search field settings:
   - All Departments
   - All Doctors
   - All Categories
   - Start Date one week before current date

3. Set fields as desired, then click **Refresh**

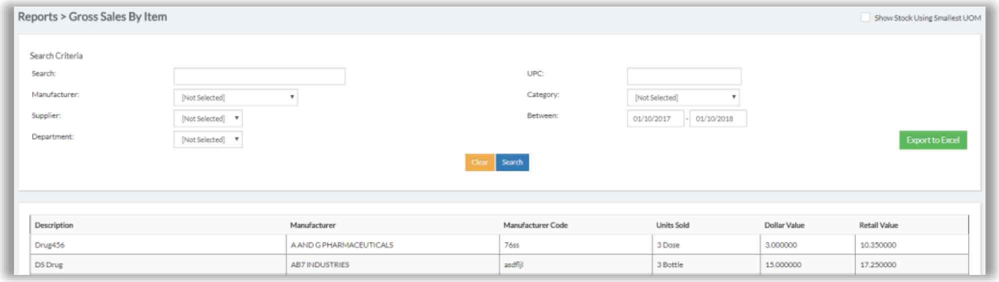
4. To search on custom fields, click **Custom Field Filters**, populate fields, then click **Refresh**

   (For more information on custom fields, please see *Create Custom Fields*)

Gross Sales By Item

1. Go to Top Menu and click **Reports**, then **Gross Sales By Item**

   Report screen appears, displaying data for current date



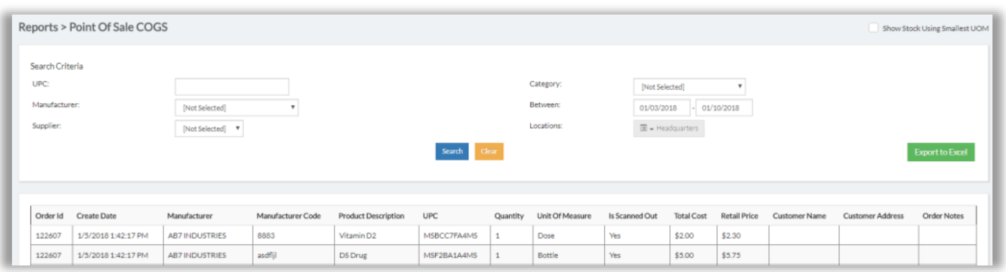
2. Set fields as desired, then click **Refresh**

Point of Sale COGS

This report shows product wholesale and retail pricing for Point of Sale ("Walk-In") customer sales (see Dispense to Walk-In Customers)

1. Go to Top Menu and click **Reports**, then **Point of Sale COGS**

   Report screen appears, displaying data for current date

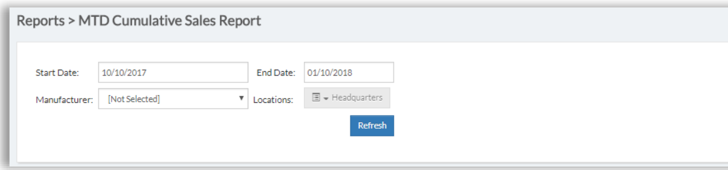


2. Set fields as desired, then click **Refresh**

MTD Cumulative Sales Report

1. Go to Top Menu and click **Reports**, then **MTD Cumulative Sales Report**

   Report screen appears



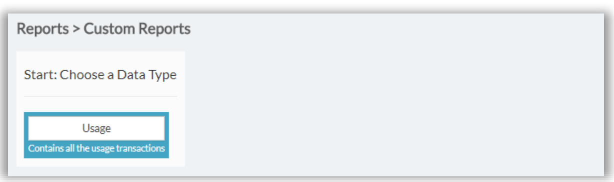
2. Set fields as desired, then click **Refresh**

Custom Reports

You can build custom reports to view specific data as desired

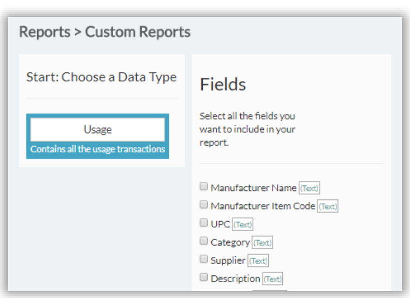
1. Go to Top Menu and click **Reports**, then **Custom Reports**

   Custom Report Screen appears



2. Click **Usage**

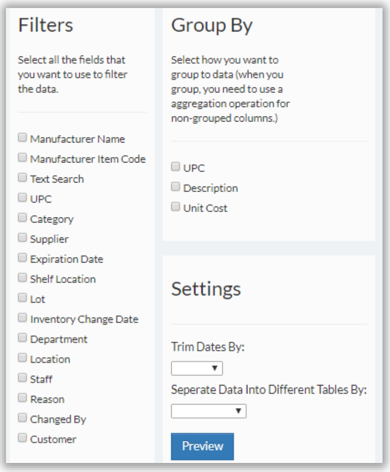
   Fields appear



3. Check the boxes for desired Fields

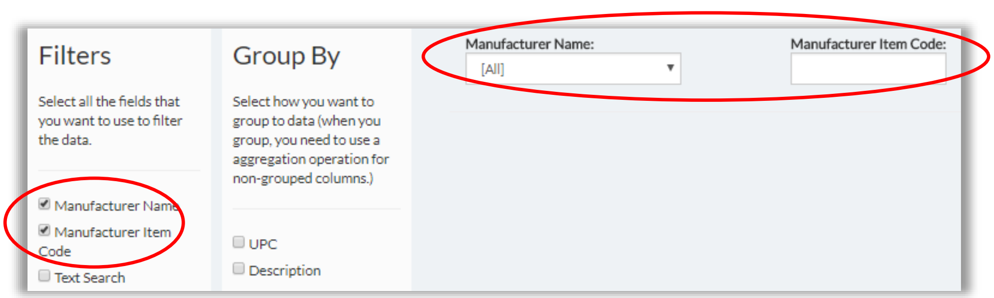
4. Scroll down and click **Next > Filters**

   Filters and other options appear



5. Select options / set fields as desired, then click **Preview**

   System provides drop-down menus for chosen Filters



6. Set drop-down menus, then click **Run Report**

   System returns data

UPC	Description	Unit Cost
00382902123545	BD BBL™ Vitamin K	10
00382902123545	BD BBL™ Vitamin K	10
00382902123545	BD BBL™ Vitamin K	3

Reserved Items List

1. Go to Top Menu and click **Inventory Management**, then **Reserved Items**

   Report screen appears

Reserves

Show 10 entries

Manufacturer	Manufacturer Code	Description	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From	Reserve Date
ABBOTT	3434zze	Drug123	Test User - User [tuu]	-	-	-	Dose 2 (1 Dose)	1/9/2018 12:20:23 PM
Test Company 2	32	BOM 1	-	-	Acctng	-	Recipe #2 (Default) (1 Each)	1/2/2018 12:18:04 PM
BD	212354	BD BBL™ Vitamin K	-	-	-	John Richards	- (0 Each)	12/18/2017 11:08:52 AM

2. Click in Search box and search on patient, drug etc.

   System shows matching record

Manufacturer	Manufacturer Code	Description	Reserved To User	Reserved To Staff	Reserved To Department	Reserved To Patient	Reserved From
ABBOTT	3434zze	Drug123	Test User - User [tuu]	-	-	-	Dose 2 (1 Dose)

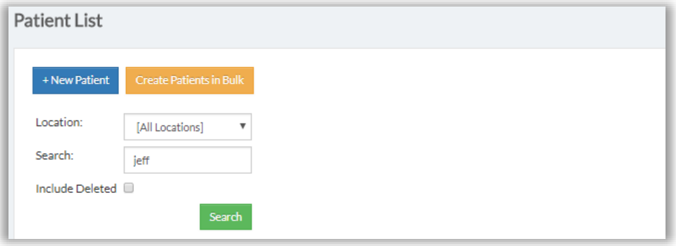
- To view product details, click box in column Manufacturer Code
- To view origin Shelf, click box in column Reserved From
- If you wish to Scan Back item to Inventory, click **Scan Back**

Search Patient List

In addition to reports, you can also view patient transactions and other data in the Patient List database

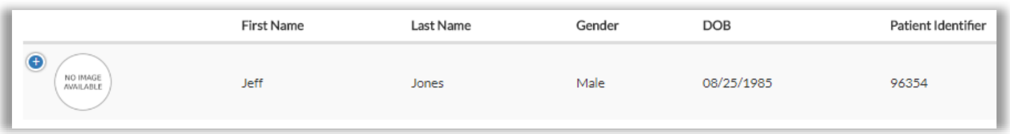
1. Go to Top Menu and click **Patients**

   Patient List screen appears



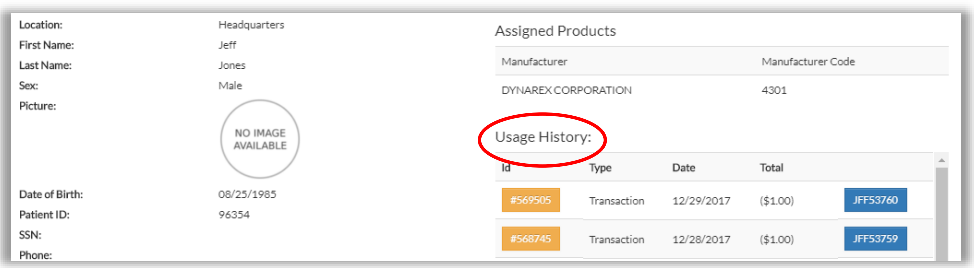
2. Click in Search box and scan in patient number, or type patient name; then click **Search**

   Patient record appears at bottom



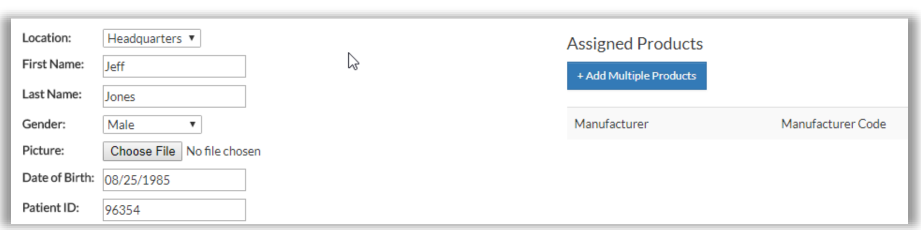
3. Click **Details** (depending on your screen resolution, you may have to first click)

   Patient Details popup appears, with Usage History on the right



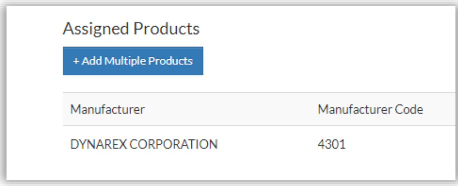
4. If you want to edit the record, click **Edit**

   Popup appears



5. Here you can Assign additional products to patient:
    a. Click **+Add Multiple Products**
    b. Select products, then click **Use Selected Items**

       Popup shows selected Product



6. Update other fields as needed, then click **Save**