Point of Use
Web Guide
Version 2.6.6

This document is intended for Web Server Users

Change Record

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

Date	Author	Version	Change Reference
9/22/2012	R. Hatt	V2.6.6	SP5

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Point of Use Overview

Nursing and Materials Management staff can improve the work flow efficiency and accuracy of Patient Charging and Par Replenishment processing using @**Par Point of Use (POU) Management** system.

This document provides an overview of functional requirements for the Server user role in the @**Par POU System**.

The objective of the system is to allow users to perform logging of Item Usage for patients by nurses and Replenishment by Material Techs, as well as generate Decision supporting reports.

@Par POU streamlines the Patient Charging and Patient Charge review by Billing Person and improves the accuracy and efficiency of persons performing the associated tasks.

Important new functionality:

1. Bill Only – These are consignment items that normally Vendors bring in for doctors and their staff to try/test/purchase
    a. Currently organizations either receive information late and “forget” to enter items into their system or
    b. They enter into system right away
    c. Additional document on BILL ONLY items will follow.
2. Recall Management – Available in both POU and @Par Receive products, this functionality allows organizations the ability to be alerted when an item is on recall, track patient the item may be on already, etc. Also, in both POU and @Par Receive if an item is on recall they will be unable to receive or issue the item unless they choose to work around it. The system will NOT allow them to process.
    a. Additional RECALL MANAGEMENT and set up document will follow.
3. Case Cart – Requires interface to an organizations OR scheduling system with inbound xml from their existing system and possibly an outbound xml file back to their system if required.
4. This process will be included in this document

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Web User – Login

This section will concentrate on the **@Par Web User's** role and access on the @**Par Server.**

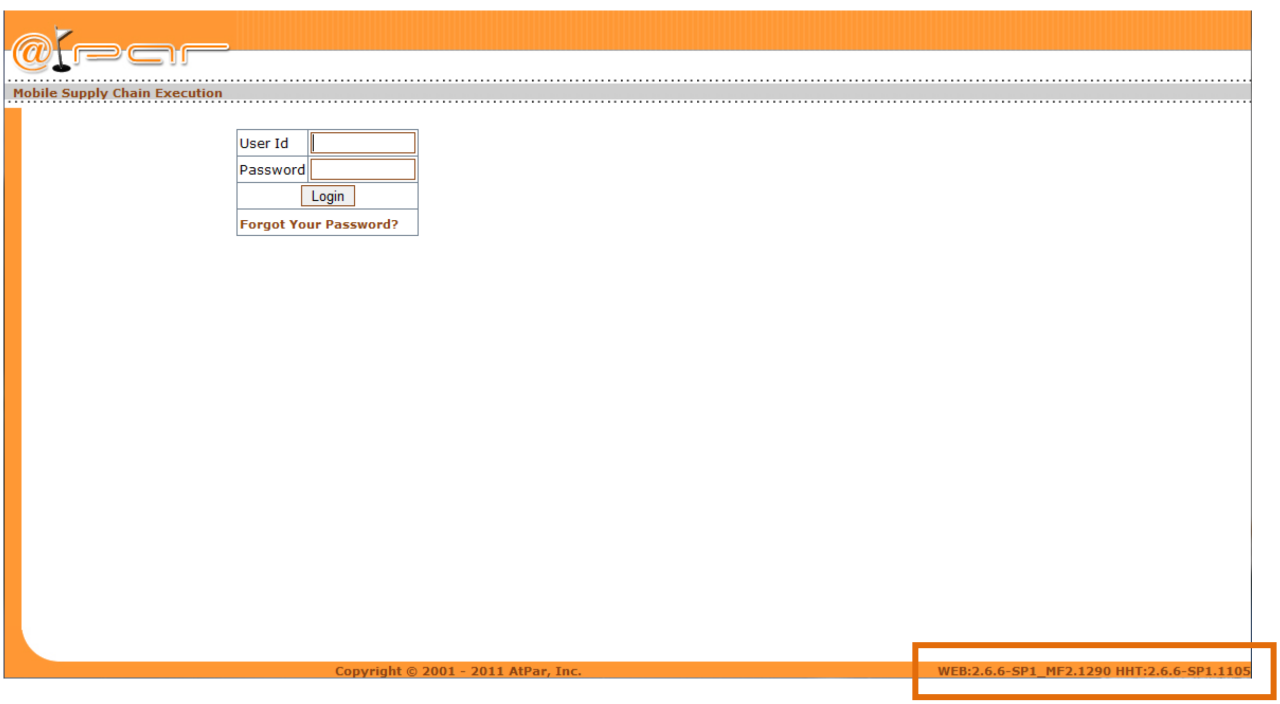

Figure 1

Note: the version number in the bottom right hand corner of the screen. This is a fast way for the **Web User** to find the **@Par** product version for reference. Note the version for Web or @Par Server, and Client (HHT) is available.

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In this release of **@Par** products the **@Par Administrator** must create profiles, users, and parameters before the **Web User** can access the system.

Once a **Web User** has been setup with products, user id, and password, they can login and the following screen will appear.

Page Menu Options

Figure 2

The products that appear may be different at your organization. For this document, we will review **Point of Use.**

Home

The **Home** link in the upper right hand section of the screen will return the Web User to the home screen in **Figure 2**. This will return them from any window on the Web Page.

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My Profile

Click on the **My Profile** link and **Figure 3** appears

My Profile

Submit

* User ID	SUPPORT	
* Session Validity Time	480	*[Value in minutes - Invalidates the user logged into the handheld device after this period of time. Forces user to re-login to communicate with the server]*
* Idle Time	480	*[Idle time for the user in Minutesuse only number(0-9). Forces user to re-login into the handheld device after this period of Inactive time]*
* First Name	Atpar	*[First name of the user accepts everything except for < or >]*
* Last Name	Support	*[Last name of the user accepts everything except for < or >]*
Middle Initial		*[Middle Initial of the user accepts everything except for < or >]*
EMail ID		*[Use the format userid@domainname.com]*
Phone 1		*[Use the format 1231231234]*
Phone 2		*[Use the format 1231231234]*
Fax		*[Use the format 1231231234]*
Pager		*[Use the format 1231231234]*
* Records Per Page	10	*(Default with 10 records per page)]*
* Default Duration in days	10	*[This will effect the From and To Dates in all the Reports (Default 10 days)]*
Org Group	All	
Profile	WEBSERVER-ADMIN	

Submit

* Mandatory

Figure 3

The **Web User** uses this section to maintain their user profile. Note that the **Web User** can't change their User ID. The User ID has been set up by the @Par Administrator and must remain unique.

Session Validity Time and Idle Time are maintained by the @Par Administrator.

Org Group and **Profile** are maintained by the @Par Administrator and are not editable.

All other fields can by modified. All mandatory fields are denoted by a * **red asterisk**.

Records Per Page – Value entered to limit the number of records displayed on a single page

Default Duration in days – Value entered to set up date range for reports to run

After making any changes to this screen, you must ***click*** the Submit button to save the change.

Help

Home My Profile Help Logout

Click on the **Help** link and the Help screen appears

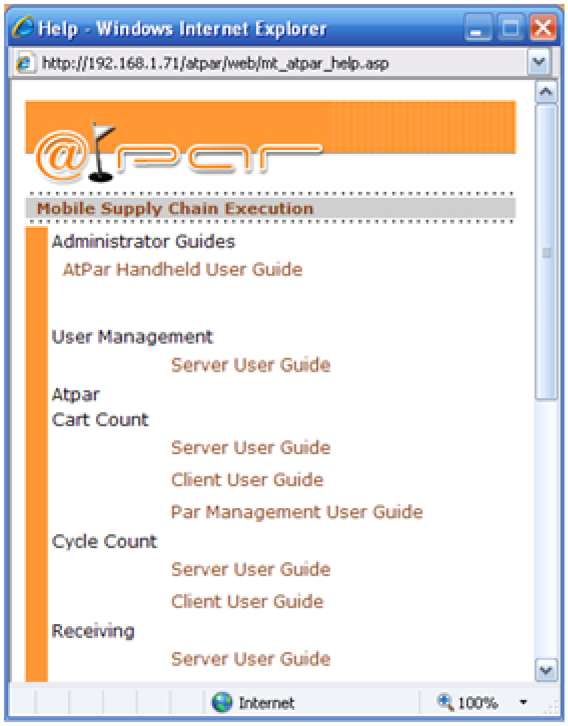

Figure 4

The **Help Manuals** available to your organization will appear. To open any document, ***click*** on the link. For example, if you need to review the HHT guide, ***click*** on the **AtPar Handheld User Guide**.

All documents are in **.PDF** format and adobe must be installed on your PC in order to open the documents. If you need assistance please see your @Par Administrator or your IT Staff.

Logout

Click the **Logout** to exit the **@Par Web** page.

Client Installable Files

The links available in this section are used to download the @Par Client software onto your organization's HHTs. For detailed information on this please refer to the **AtPar Handheld User Guide**.

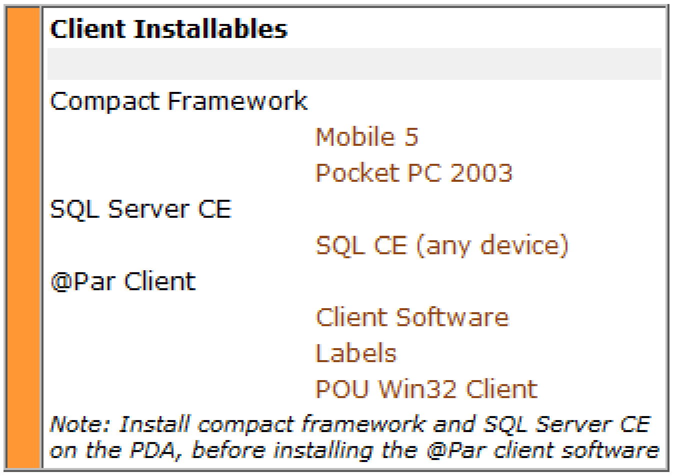

Figure 5

To access the **AtPar Handheld User Guide** and all other AtPar help files, ***click*** the **Help** link at the top of the screen **Figure 2** and select the document to view.

Login into the @Par POU Web User

Prior to utilizing the **POU** product, you must first log into the system as a Web/Server user and create users, set various parameters, profiles, etc.

To do so, please enter the appropriate link into the Internet Browser, and ***select*** the **enter** button. This will provide you with the **POU** login screen shown below in **Figure 6**

Figure 6

Enter the Web/Server User ID and password. After logging in you should receive the **@Par POU** Server screen shown next in **Figure 7**

Figure 7

If the menu display on the left of the screen needs to be hidden at any time simply ***click*** the "HIDE SIDEBAR" button and the screen display will change **Figure 8**

Figure 8

Note: On the right hand side of the screen the files available for download. New in the latest release, organizations can download the @Par POU Client software to a PC Workstation/Desktop or to a hand held terminal (HHT). As with all

@Par products the download is accomplished from the device you wish to install (PC or HHT). This will be discussed in the POU HHT Guide.

The first function you will see is **Atpar**. The options available here are dependent on how the @Par Administrator has set the user up. ***Click*** on the **AtPar link** and you will see some or all of the options available in **Figure 9**.

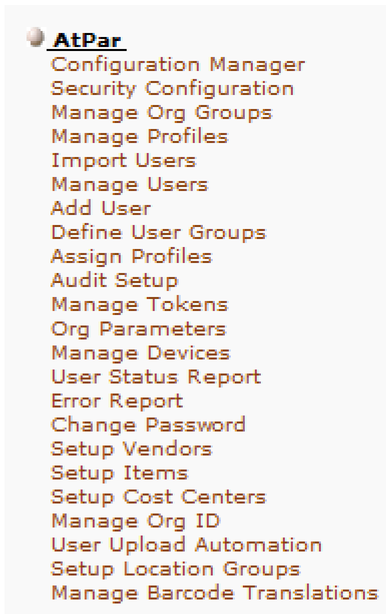

Figure 9

The **AtPar** link options are available and covered in the User Management Guide.

Point of Use - Setup Menu Options

To begin the POU setup ***click*** on the **Point of Use** menu option and all the various menu options are displayed as shown in **Figure 10**

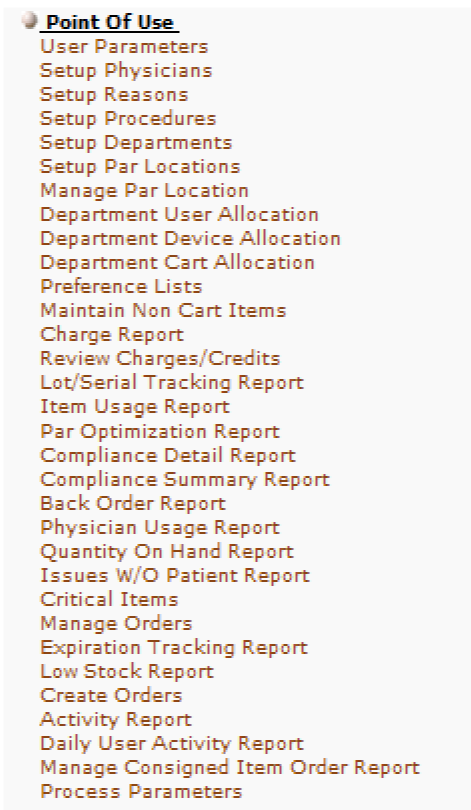

Figure 10

This document will cover all available menu options, though actual options that appear when Web Users login are based on the setup by @Par Administrator. Some of the options in **Figure 10** may not be setup to display for your Web login.

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User Parameters

A user will be set up with some profile parameters by the @Par Administrator, but also needs to identify in **User Parameters** further what they can have permissions to view.

Click on this menu option and the following screen appears. **Figure 11**

Figure 11

After ***highlighting*** the user ***click*** on Go and the screen below appears: **Figure 12**

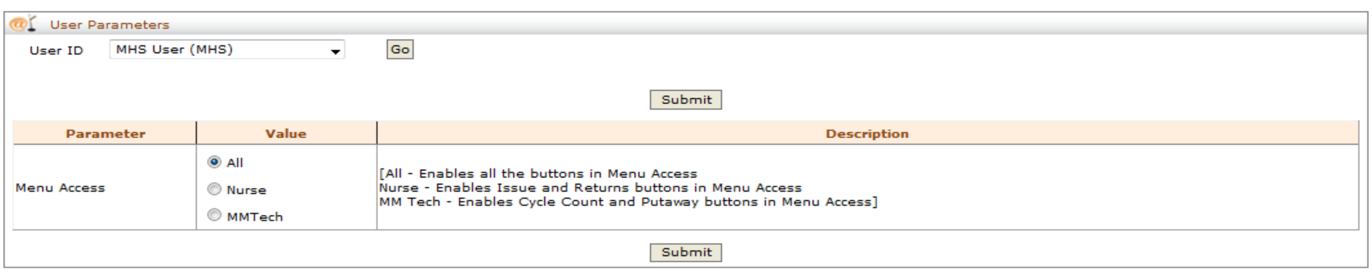

Figure 12

This setting determines the "*Client Access"* the user has access to on the HHT or PC Workstation

All – Enables all screen options available on POU client screen (Issue, Returns, Cycle Count, and Putaway)

Nurse – Enables only Issue and Returns screen options

MMTech – Enables Cycle Count and Putaway screen options only.

NOTE: Only the HHT will have Case Pick and Case Issue buttons available, the options do NOT display on the PC Workstation

Process Parameters

@Par POU allows the setup of scheduling issue processing and billing processing. Using this menu option a Web user or supervisor can set up all processing parameters by Org Id, Department, and Par Locations. ***Click*** on this option to display the following screen **Figure 13**

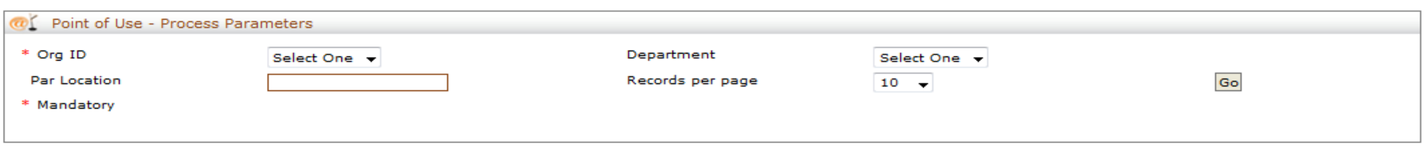

Figure 13

Note: Prior to set up of Process Parameters the process **MUST** be created Process Scheduler.

Select **ORG ID** from the drop down list. This is the only mandatory search option.

To further define what appears you can ***select*** the department from the Department drop down list and/or ***enter*** the Par Location/Cart ID in the Par Location field. ***Highlight*** at least the ORG ID and ***click*** the Go button. **Figure 14** appears

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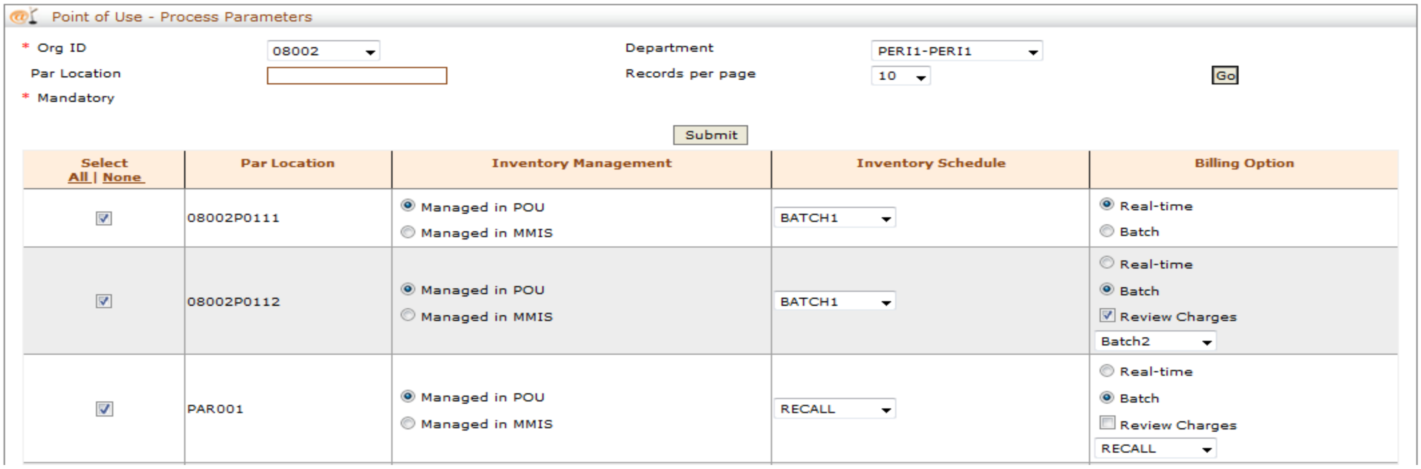


Figure 14

All allocated Par Locations will appear in this list.

To assign a Par Location to process, ***click*** the check box to the left of the Par Location in **Figure 14**

Select one of the options in the Inventory Management column"

1. Managed in POU – Expensed Locations
2. Manage in MMIS – Perpetual Inventory

When a location is designated as "Managed in POU" it will use same process as @Par Cart Count after counting and sending data to server.

When a location is designated as "Managed in MMIS" it is an asset location. It has to do a Stock Issue transaction when an Issue is sent from the HHT so a Stock Issue Component Interface must be done prior to sending this information; otherwise a "General Server Error" message will appear on the HHT.

Select a process (which was set up in the Process Scheduler section) from the drop down list.

Select a Billing Option.

Note: If the Billing Option of BATCH is selected, a check box for Review Charges will appear as well as a drop down list for the Process to run after charges have been reviewed. If the Billing Option of REAL TIME is selected the charges go directly to the organization's billing system without the opportunity to first review all charges.

- Batch will run all completed processes at the denoted time and **MUST** have times set. These are set in the Process Scheduler option.
- Real Time will send the process upon data being issued from the workstation or HHT device.

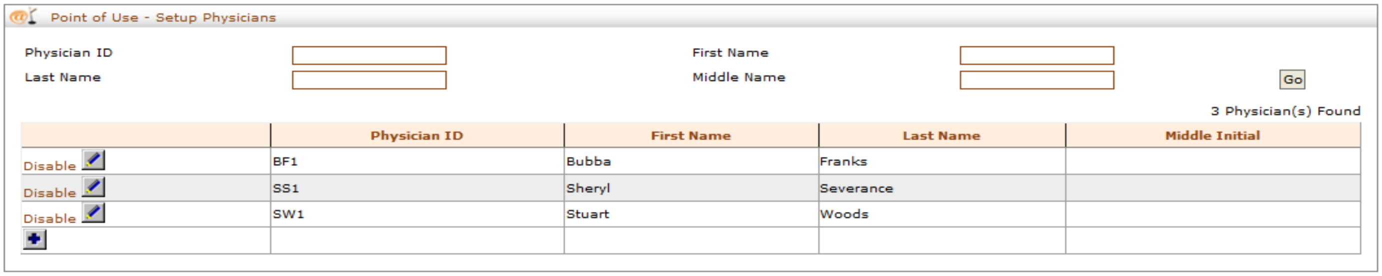
The Billing Option column is used to set up processing for your Patient Charges

- Real Time – Once the issue has been created on the POU Workstation or HHT and sent
- Batch – After issues are created, batching a process will allow the setting for certain times during the day/night
- Review Charges – Selecting this option will require all issues to be reviewed and approved before charges are processed to the ERP Billing system. .

After selecting the process type ***click*** the Save Parameters button.

Setup Physicians

Physicians will need to be added before the POU system can be utilized. ***Click*** on the **Setup Physician** link and if any physicians have been added you will receive the screen shown in **Figure 15**.



	Physician ID	First Name	Last Name	Middle Initial
Disable	BF1	Bubba	Franks	
Disable	SS1	Sheryl	Severance	
Disable	SW1	Stuart	Woods	

Figure 15

Use this screen to search for a Physician. Users can also edit, disable, or delete a Physician. Search by Physician ID, First Name, Last Name, or Middle Name and ***click*** the Go button

Add New Physician and Save

Click the icon. This will display the following screen **Figure 16**

Figure 16

Enter the Physician ID, Last Name, First Name, and Middle Initial and ***click*** the icon to save.

Disable/Delete or Edit Physician Information

Click the icon found in **Figure 15**. This will allow the user to **delete** the Physician by ***clicking*** on the icon.

It will also allow the First, Last and Middle Initial to be altered and saved after ***clicking*** the icon. **Figure 17**

Figure 17

To disable the physician ***click*** on the **Disable** link. A popup will appear asking; “Are you sure about the change?” **Figure 18**

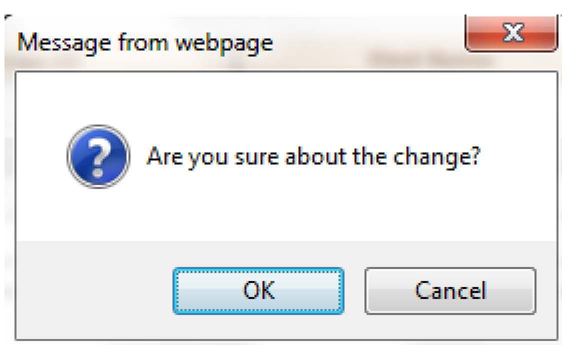


Figure 18

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Click the 

button and the Physician will be disabled.

They can be enabled again. If physician needs to be activated or enabled again ***click*** on **Enable**. **Figure 19**

Figure 19

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Setup Reasons

Reason Codes are required to use the **Returns** module of **@Par POU**. When an item is being returned after issuing, the user will need to select a reason code. ***Click*** on the **Setup Reasons** link and see the following screen shown in **Figure 20**.

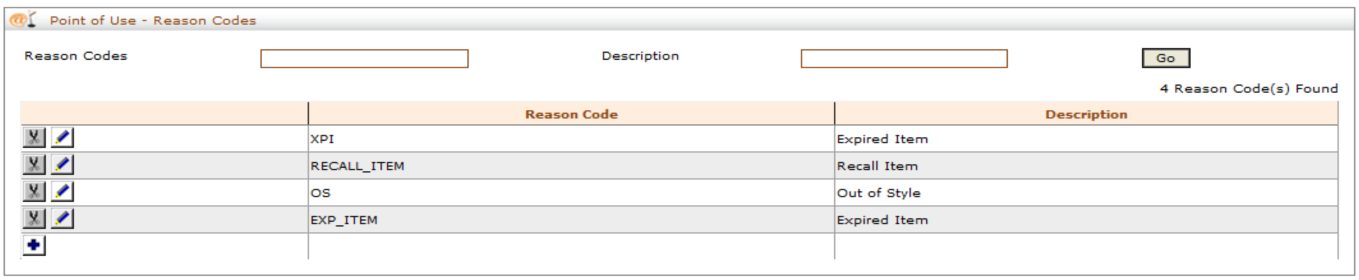


Figure 20

Click the icon to add a Reason **Figure 21**.

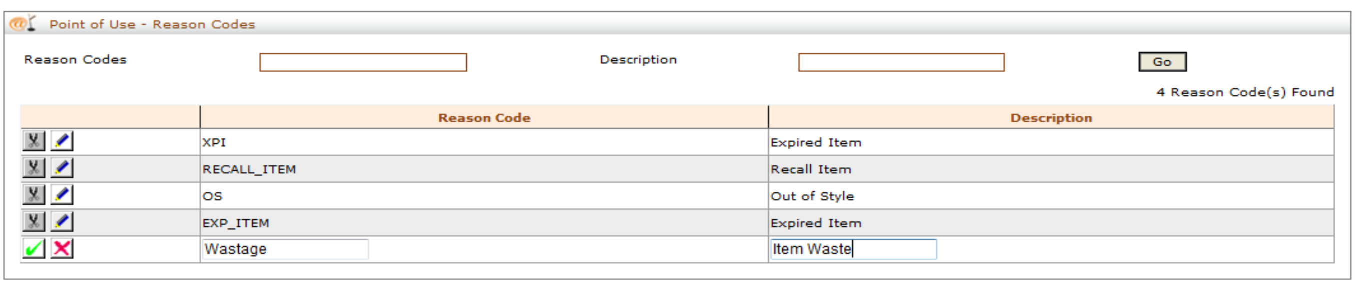


Figure 21

Enter a unique Reason Code and a Description. When done ***click*** the icon and this will add the Reason Code setup to the list as shown next **Figure 22**.

Clicking the above will abandon the entry without saving.

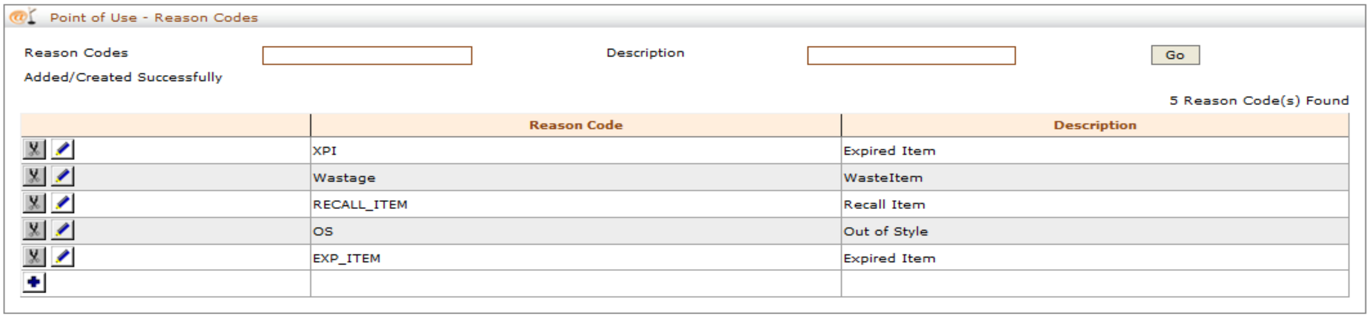


Figure 22

Click the icon to edit an existing Reason Code.

Click the icon to delete or remove an existing Reason Code.

Note: If an organization uses either Recall Management or Lot/Serial controlled items they should use a RECALL_ITEMS reason code and an EXP_ITEM reason code.

Setup Procedures

This section is used to setup Procedure Codes required for billing purposes. The Codes will be based on your organization's codes. Select the **Setup Procedures** link and **Figure 23** will appear

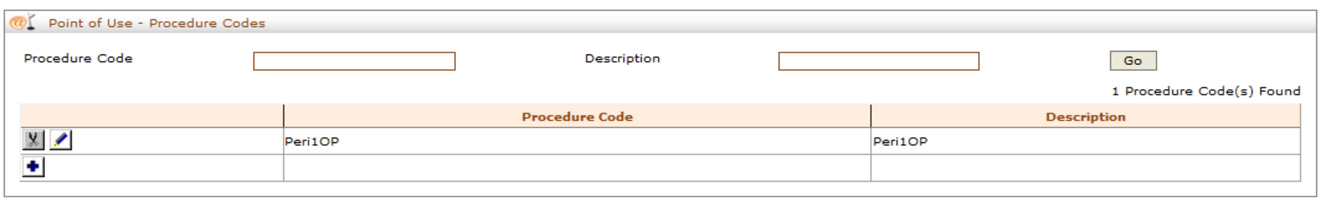


Figure 23

Click the to start the Procedure setup shown next **Figure 24**.

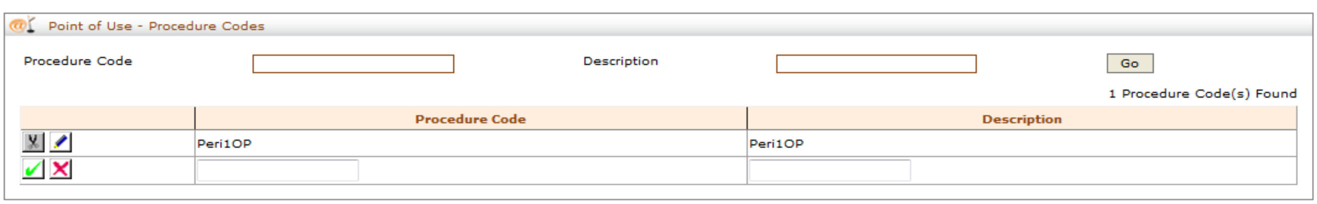


Figure 24

Enter the Procedure Code and a Description. ***Clicking*** the will abandon the entry without saving.

When done ***click*** the icon and this will add the information to the list as shown next **Figure 25**.

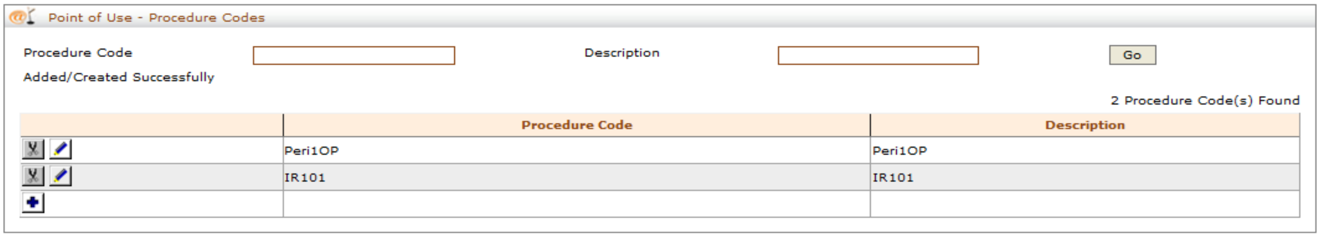


Figure 25

Click the icon to edit an existing Procedure Code.

Click the icon to delete or remove an existing Procedure Code.

Setup Departments

This section is used to setup all departments utilizing @Par POU on workstations and must be set up prior to using the software. Unique Department ID is required per department.

Click the **Setup Departments** link and the following screen appears **Figure 26**

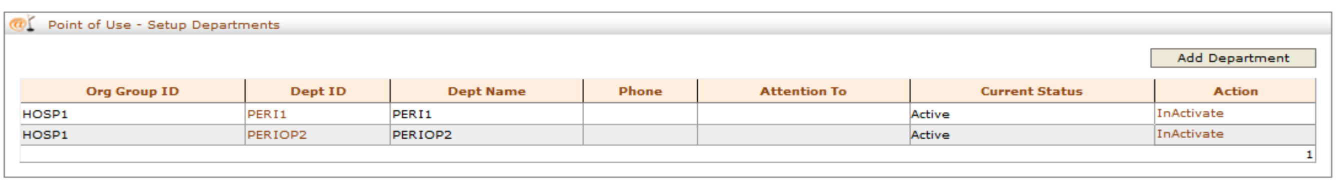
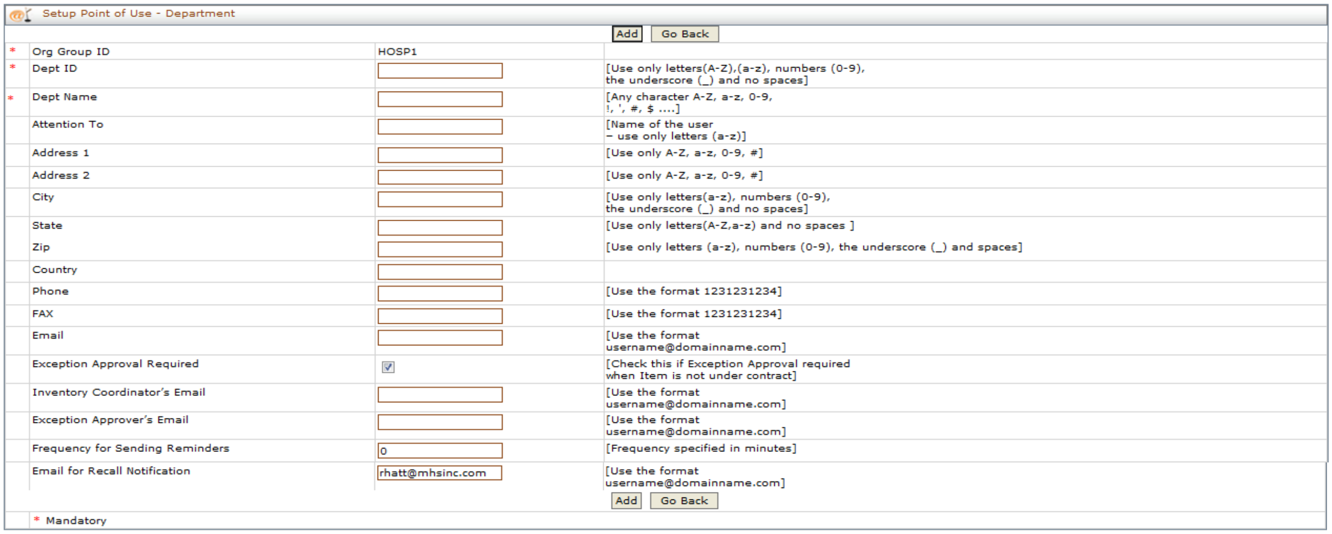


Figure 26

Click the Add Department button to start the Department setup procedure shown next **Figure 27**.



Setup Point of Use - Department

Add | Go Back

* Org Group ID	HOSP1	
* Dept ID		[Use only letters(A-Z),(a-z), numbers (0-9), the underscore (_) and no spaces]
* Dept Name		[Any character A-Z, a-z, 0-9, !, ', #, $ ....]
Attention To		[Name of the user – use only letters (a-z)]
Address 1		[Use only A-Z, a-z, 0-9, #]
Address 2		[Use only A-Z, a-z, 0-9, #]
City		[Use only letters(a-z), numbers (0-9), the underscore (_) and no spaces]
State		[Use only letters(A-Z,a-z) and no spaces]
Zip		[Use only letters (a-z), numbers (0-9), the underscore (_) and spaces]
Country		
Phone		[Use the format 1231231234]
FAX		[Use the format 1231231234]
Email		[Use the format username@domainname.com]
Exception Approval Required	☑	[Check this if Exception Approval required when Item is not under contract]
Inventory Coordinator's Email		[Use the format username@domainname.com]
Exception Approver's Email		[Use the format username@domainname.com]
Frequency for Sending Reminders	0	[Frequency specified in minutes]
Email for Recall Notification	rhatt@mhsinc.com	[Use the format username@domainname.com]

Add | Go Back

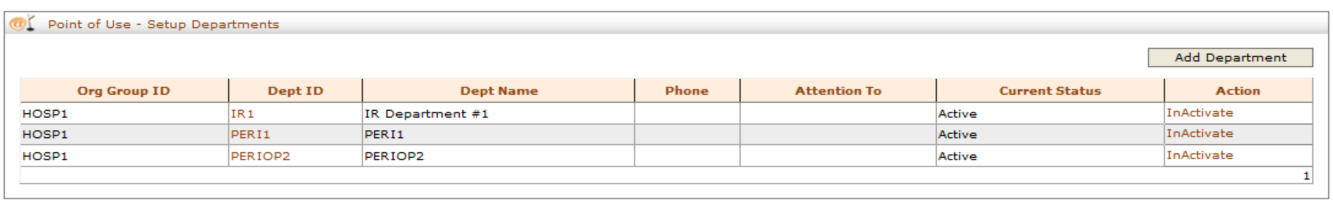
* Mandatory

Figure 27

Enter the mandatory fields of Department ID and Description.

If the Exception Approval Required check box is checked, ensure the email address for notification is entered in the Exception Approver's Email text box. This can be either a personal email address or a distribution email address. With the parameter checked, this will require the approval user to review items before they are issued. This is recommended for organizations that will open up the @Par POU to Vendors.

When done ***click*** the Add button. This will add it to the list as shown next **Figure 28**.



Point of Use - Setup Departments

Add Department

Org Group ID	Dept ID	Dept Name	Phone	Attention To	Current Status	Action
HOSP1	IR1	IR Department #1			Active	InActivate
HOSP1	PERI1	PERI1			Active	InActivate
HOSP1	PERIOP2	PERIOP2			Active	InActivate

1

Figure 28

A department can't be deleted, only activated or inactivated. To activate or inactivate a department simply ***click*** the highlighted action link (**Inactivate or Activate**) in the far right side of the screen for the respective Department.

Setup Par Locations

With @Par POU organizations have the ability to manage their locations either through the MMIS ERP (i.e. PeopleSoft, Lawson, etc.) or Par Locations set up in POU.

First create a Par location header and then add items to the location.

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Select the **Setup Par Locations** link and **Figure 29** appears

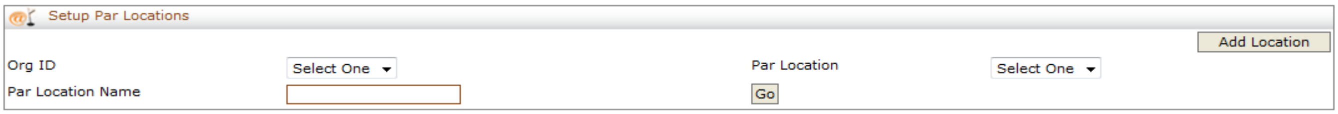

Figure 29

Click the Add Location button **Figure 30**

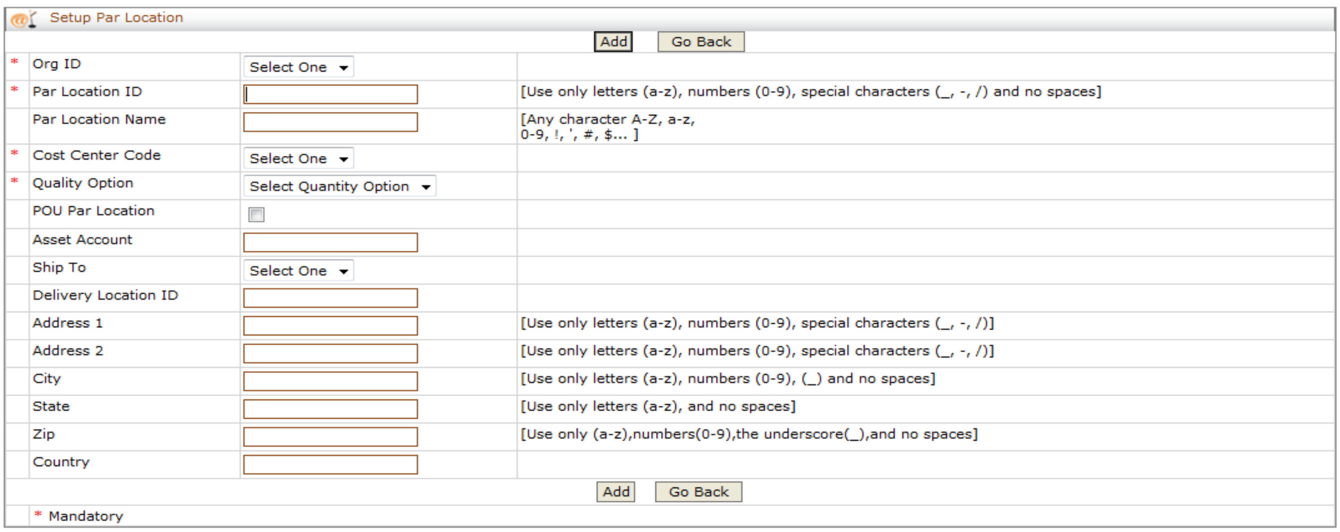

Figure 30

Enter all mandatory (*) fields and other applicable fields if required. If this is a POU Cart or Par Location the checkbox POU Par Location **must** be ***checked***. If the location is an inventory or asset location enter the account number in the Asset Account parameter.

Click the Go Back button to return to previous screen without saving/adding location.

To save the Par Location header ***click*** the Add button **Figure 31**

Figure 31

ADD AN ITEM TO AN EXISTING PAR LOCATION

To add an item to an existing Par Location, ***select*** the **Setup Par Locations** link and **Figure 32** appears

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Setup Par Locations

Add Location

Org ID Select One

Par Location Select One

Par Location Name

Go

Figure 32

If a Par Location exists ***enter*** the **Org ID** and ***click*** the Go button. (If Par Location is known select it from the Par Location drop down list and then ***click*** the Go button) – **Figure 33** appears


Setup Par Locations

Add Location

Org ID 08002

Par Location Select One

Par Location Name

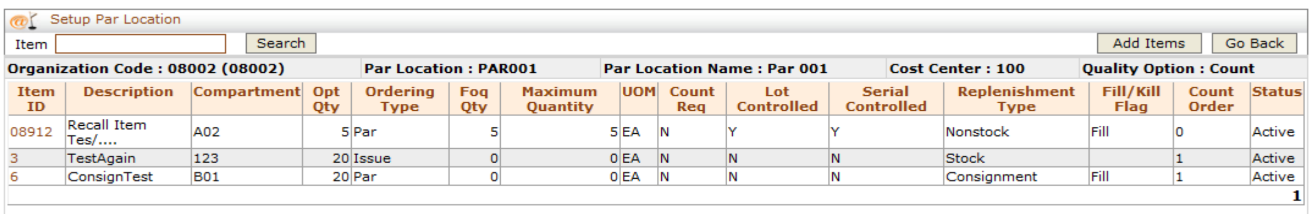
Go

Cost Center Code	Par Location ID	Par Location Name	Org ID	Quality Option	POU Cart	
100	PAR001	Par 001	08002	Count	Y	+
100	PAR002	Test two	08002	Count	N	+
100	Par003	Par003	08002	Count	Y	+
100	ParTEST1	Test one Par	08002	Count	Y	+

1

Figure 33

Click the button that is on line of Par Location ID to add an item to. **Figure 34**


Setup Par Location

Item Search Add Items Go Back

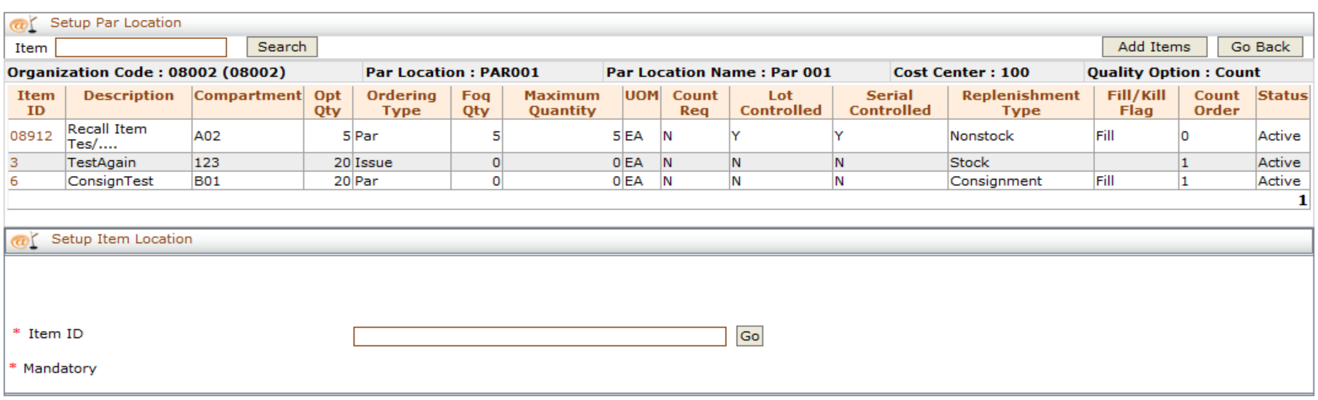
Organization Code : 08002 (08002) Par Location : PAR001 Par Location Name : Par 001 Cost Center : 100 Quality Option : Count

Item ID	Description	Compartment	Opt Qty	Ordering Type	Foq Qty	Maximum Quantity	UOM	Count Req	Lot Controlled	Serial Controlled	Replenishment Type	Fill/Kill Flag	Count Order	Status
08912	Recall Item Tes/....	A02	5	Par	5	5	EA	N	Y	Y	Nonstock	Fill	0	Active
3	TestAgain	123	20	Issue	0	0	EA	N	N	N	Stock		1	Active
6	ConsignTest	B01	20	Par	0	0	EA	N	N	N	Consignment	Fill	1	Active

1

Figure 34

Click the Add Item button **Figure 35**


Setup Par Location

Item Search Add Items Go Back

Organization Code : 08002 (08002) Par Location : PAR001 Par Location Name : Par 001 Cost Center : 100 Quality Option : Count

Item ID	Description	Compartment	Opt Qty	Ordering Type	Foq Qty	Maximum Quantity	UOM	Count Req	Lot Controlled	Serial Controlled	Replenishment Type	Fill/Kill Flag	Count Order	Status
08912	Recall Item Tes/....	A02	5	Par	5	5	EA	N	Y	Y	Nonstock	Fill	0	Active
3	TestAgain	123	20	Issue	0	0	EA	N	N	N	Stock		1	Active
6	ConsignTest	B01	20	Par	0	0	EA	N	N	N	Consignment	Fill	1	Active

1

Setup Item Location

* Item ID Go

* Mandatory

Figure 35

Enter an item ID and ***click*** the Go button **Figure 36**

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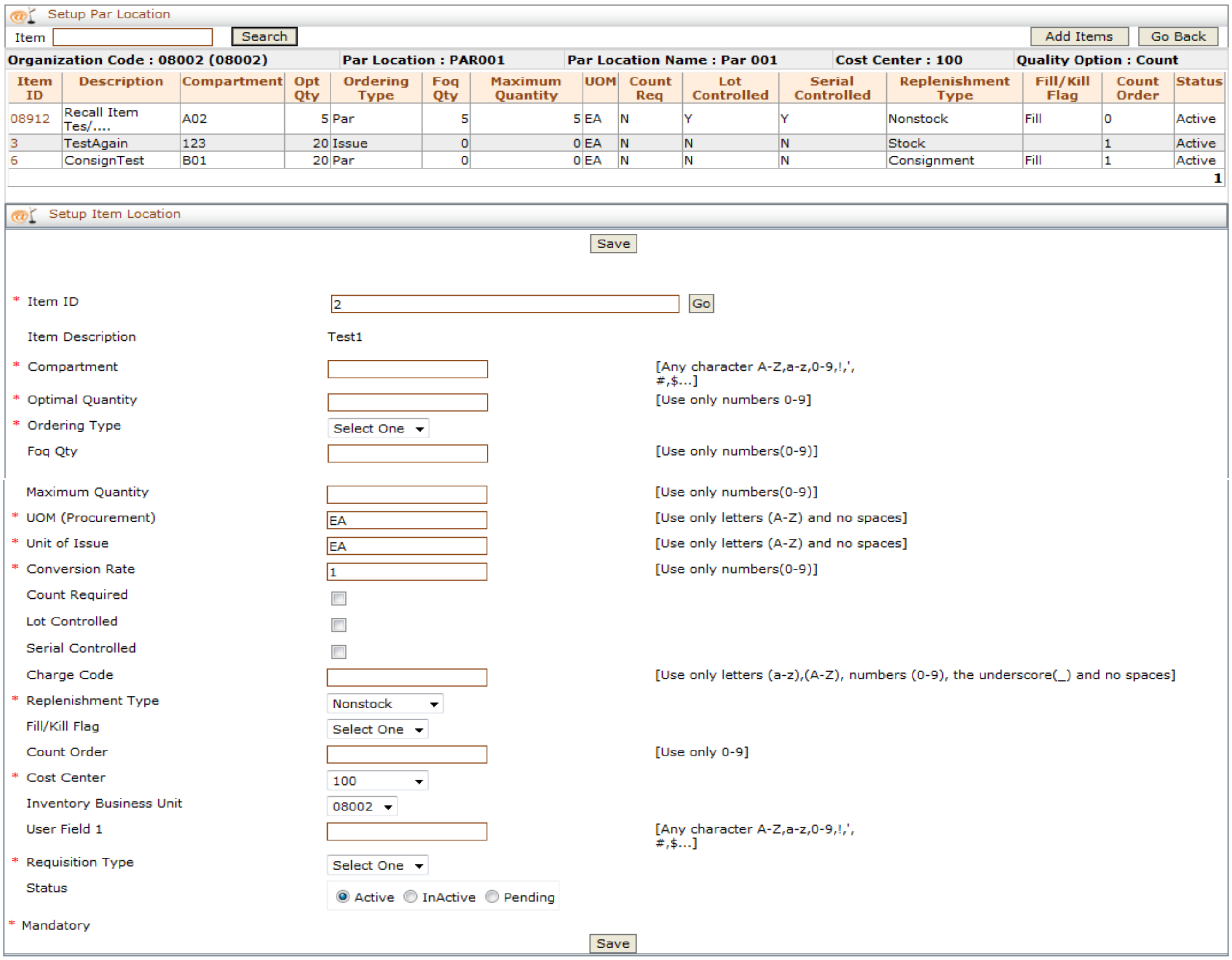
Note: Item ID **MUST** be a valid item in the database


Setup Par Location

Item [ ] Search | Add Items | Go Back

Organization Code : 08002 (08002)	Par Location : PAR001	Par Location Name : Par 001	Cost Center : 100	Quality Option : Count

Item ID	Description	Compartment	Opt Qty	Ordering Type	Foq Qty	Maximum Quantity	UOM	Count Req	Lot Controlled	Serial Controlled	Replenishment Type	Fill/Kill Flag	Count Order	Status
08912	Recall Item Tes/....	A02	5	Par	5	5	EA	N	Y	Y	Nonstock	Fill	0	Active
3	TestAgain	123	20	Issue	0	0	EA	N	N	N	Stock		1	Active
6	ConsignTest	B01	20	Par	0	0	EA	N	N	N	Consignment	Fill	1	Active

1

Setup Item Location

Save

* Item ID	2 [Go]	
Item Description	Test1	
* Compartment		[Any character A-Z,a-z,0-9,!,',#,$...]
* Optimal Quantity		[Use only numbers 0-9]
* Ordering Type	Select One	
Foq Qty		[Use only numbers(0-9)]
Maximum Quantity		[Use only numbers(0-9)]
* UOM (Procurement)	EA	[Use only letters (A-Z) and no spaces]
* Unit of Issue	EA	[Use only letters (A-Z) and no spaces]
* Conversion Rate	1	[Use only numbers(0-9)]
Count Required	☐	
Lot Controlled	☐	
Serial Controlled	☐	
Charge Code		[Use only letters (a-z),(A-Z), numbers (0-9), the underscore(_) and no spaces]
* Replenishment Type	Nonstock	
Fill/Kill Flag	Select One	
Count Order		[Use only 0-9]
* Cost Center	100	
Inventory Business Unit	08002	
User Field 1		[Any character A-Z,a-z,0-9,!,',#,$...]
* Requisition Type	Select One	
Status	(●) Active ( ) InActive ( ) Pending	

* Mandatory

Save

Figure 36

Enter all mandatory (*) fields and all others that are pertinent to this item.

Conversion rate:

1. If item is each enter a 1
2. If item is in box of 12 enter 12

To use this item, the **Active** radio button must be ***selected***.

Click the [Save] button

Manage Par Locations

Management of the Par Locations in POU is done through the **Manage Par Locations** function. ***Select*** this link and following screen appears **Figure 37**

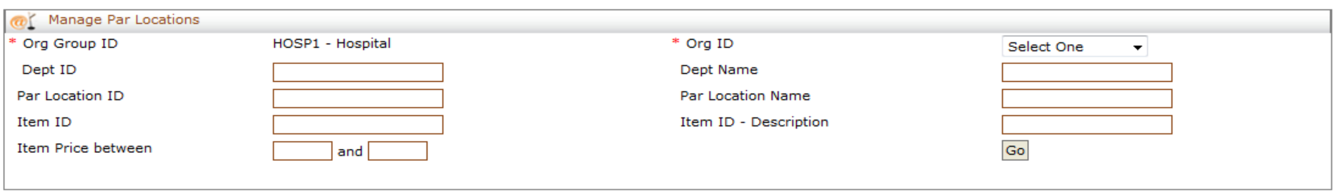


Figure 37

Select the **Org ID** from drop down then ***click*** the button **Figure 38**

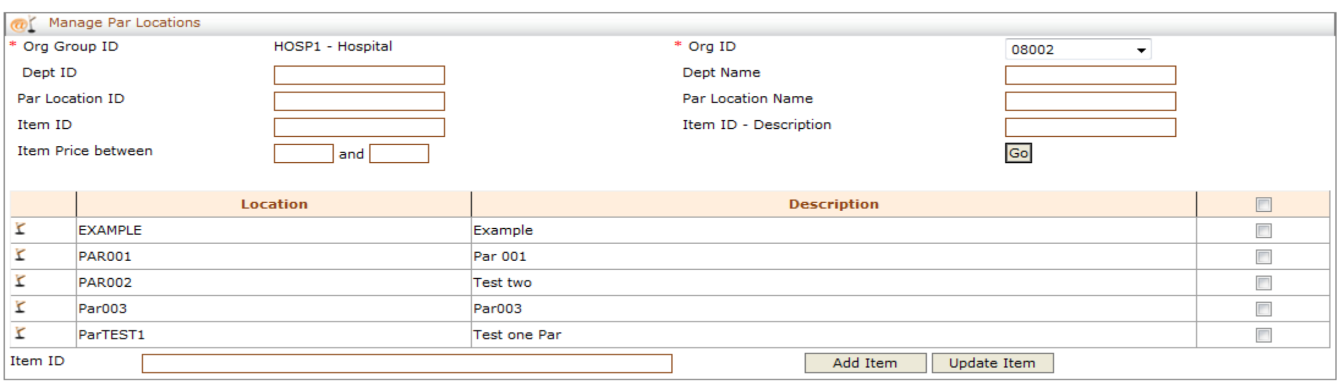


Figure 38

Click in the check box to the right of the Location to add item into.

Enter in a valid Item ID into blank Item ID field at the bottom of the screen and ***click*** the button **Figure 39**

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

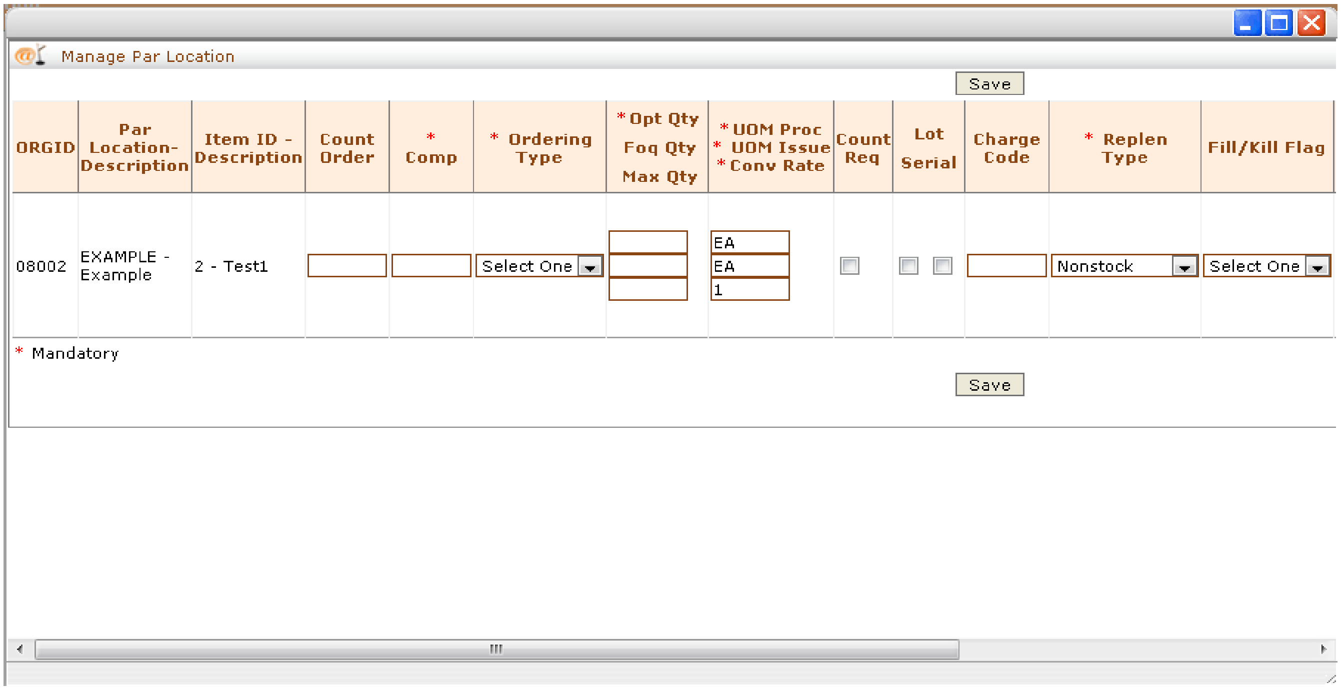


Figure 39

Enter all required (*) fields and when done, ***click*** the Save button

Department User Allocation

Another setup stage is the **Allocation of Users to Departments**. Prior to selecting this option you should have already created new Departments.

Select the **Department User Allocation** option and the following screen **Figure 40**

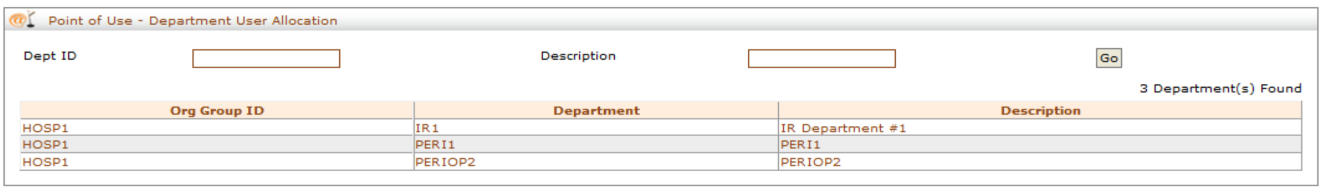


Figure 40

Select one of the departments if it is visible on the screen, or search by one of the search fields to find a department.

Click on the button

If the Dept ID you select doesn't appear you will see the following screen **Figure 41**

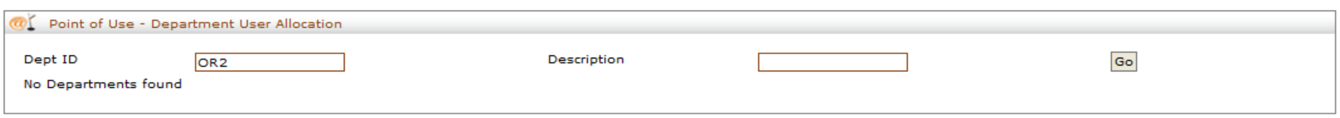


Figure 41

Enter a valid Dept ID and ***click*** the button or ***click*** the Department ID that exists in **Figure 40** and the following screen should appear **Figure 42**

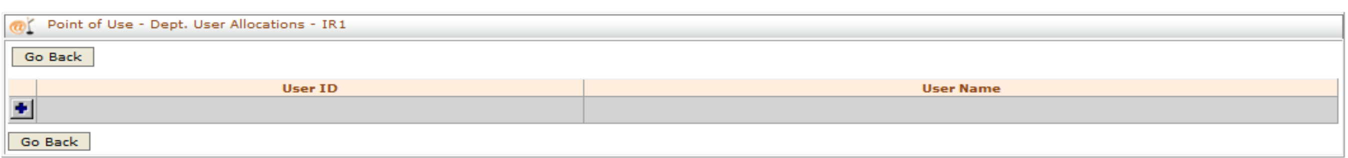


Figure 42

Click the button and the screen shown next will display **Figure 43**

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

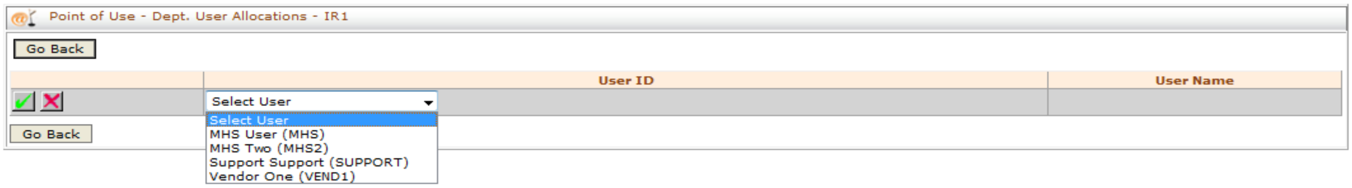


Figure 43

Click on the drop down User ID window to select a user then ***click*** the button to save or the **button** to delete without saving.

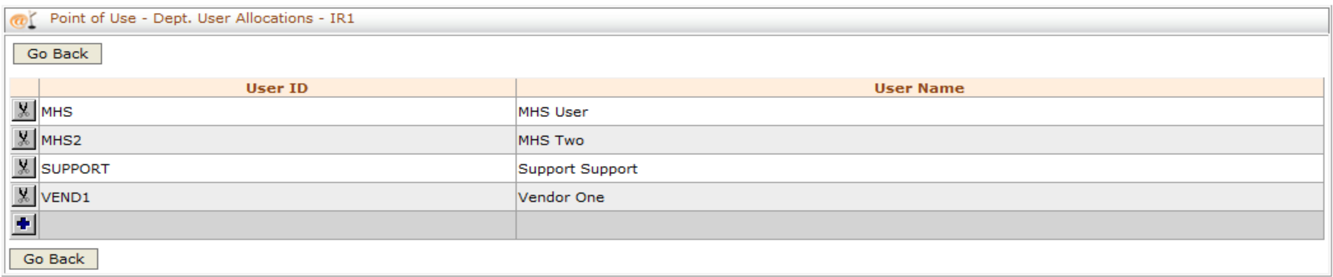


Figure 44

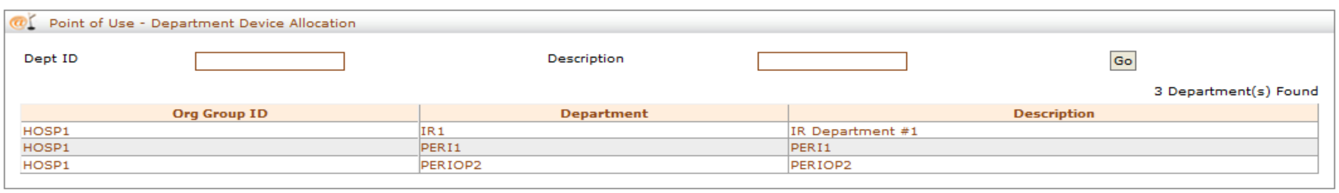
To remove a User from a department in **Figure 44**, ***click*** the icon to the left of the User ID.

Once you have created Departments and allocated users to the Department(s) the next step is to allocate devices to the Department(s). This process is shown on the next page.

Department Device Allocation

This menu option is used to set up devices such as hand held terminals (HHT) and PC Desktops to the **@Par POU** system. Each device **must** be setup for each department prior to using the software.

Select the **Department Device Allocation** link **Figure 45**


Point of Use - Department Device Allocation

Dept ID Description Go

3 Department(s) Found

Org Group ID	Department	Description
HOSP1	IR1	IR Department #1
HOSP1	PERI1	PERI1
HOSP1	PERIOP2	PERIOP2

Figure 45

To search for existing departments type in a partial or whole **Dept ID** or **Description** and ***click*** the Go button

If the Department does not have any devices allocated you will receive the following **Figure 46**
:

Figure 46

If this department needs a device or devices added to it, return to the **Setup Departments** option and create a department. Once a department is selected then the following screen will appear **Figure 47**

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

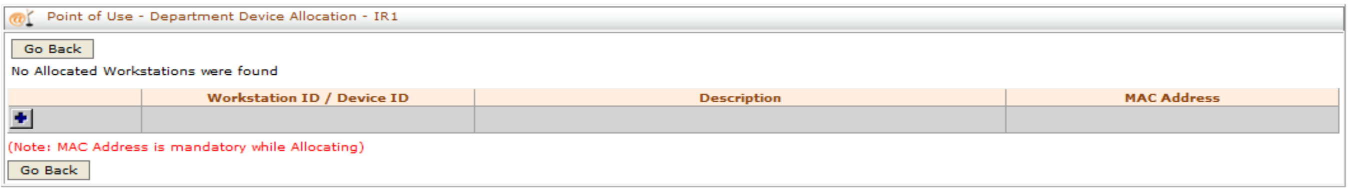


Figure 47

Click on the icon to add a new device and you will get the following screen: **Figure 48**

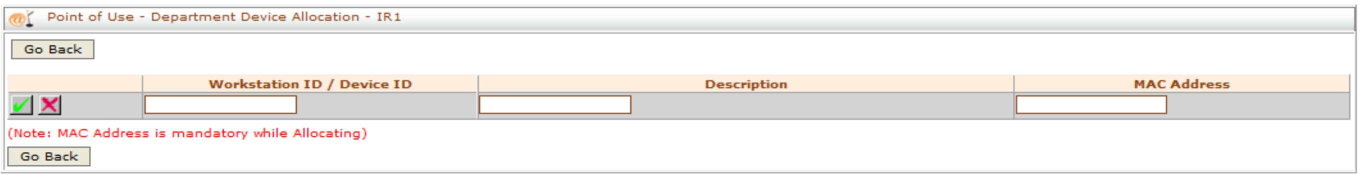


Figure 48

Work Station ID/Device ID - Any PC Workstation or Device ID you wish to assign can be entered here.

Note: No spaces allowed.

Description - A device type name works well for this field however any description will work.

Mac Address – This is the MAC address of the Workstation or HHT. Your IT staff can help if you need this information from an HHT and can be found on the "Update Config File" that is installed on a Workstation Desktop. **Figure 49**

Figure 49

Click on the icon in **Figure 49** and the information will appear in a pop up window **Figure 50**

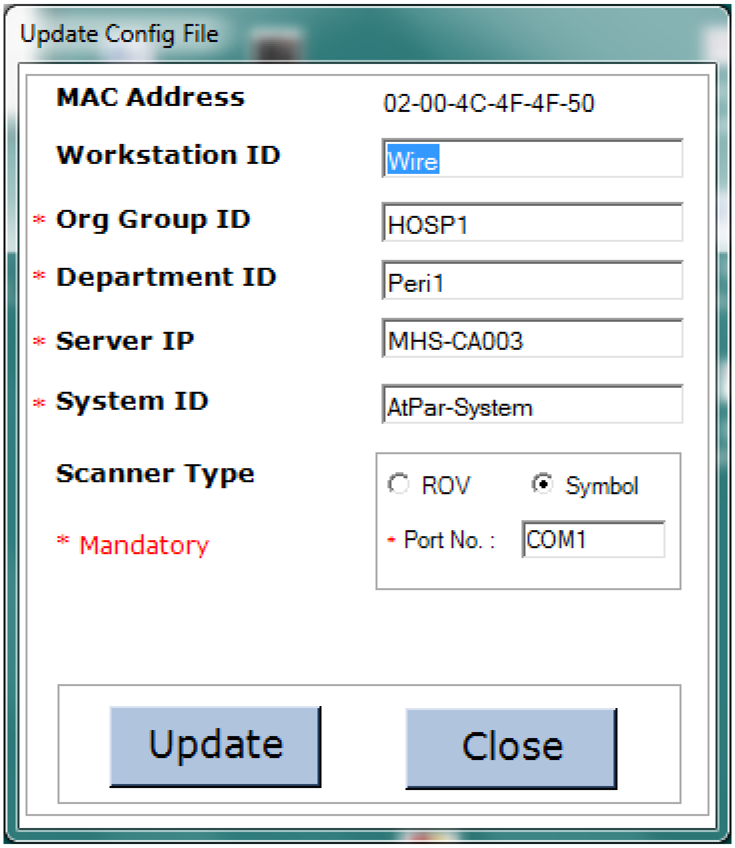


Figure 50

Click the icon in **Figure 48** to save or the icon to delete.

If you have entered an invalid Mac address the message shown in **Figure 51** will appear.

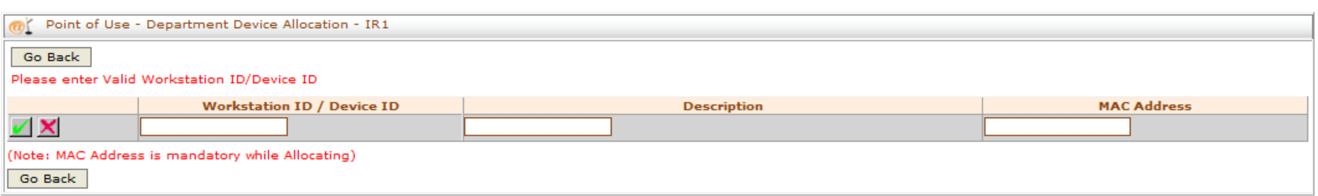


Figure 51

Once you have the Device(s) assigned in the Department(s) **Figure 52**, you may delete or edit an existing device at any time.

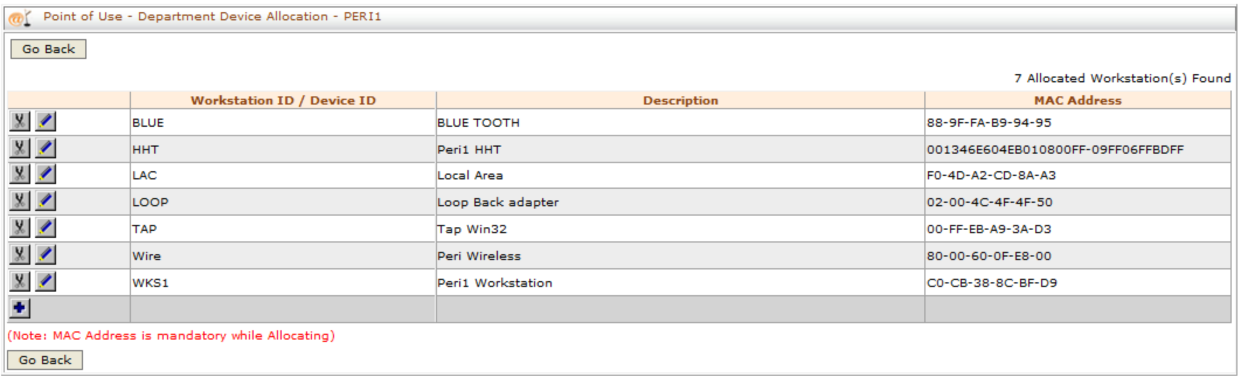


Figure 52

To delete a device from the current listing, ***click*** on the

To edit a device on the current list ***click*** on the

Note: A device can ONLY be allocated to a single department. If an attempt to allocate a device that has been allocated previously to another department the following screen will appear. **Figure 53**

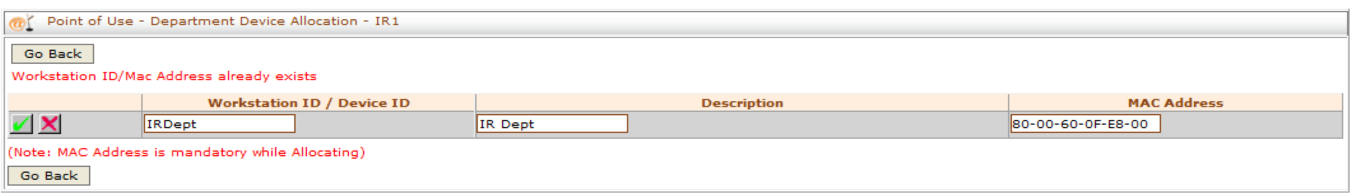


Figure 53

Department Cart Allocation

Prior to utilizing this menu option, you must FIRST allocate devices to department(s). When you are ready to allocate Carts/Par Locations to Departments, ***select*** this menu option and the following screen appears **Figure 54**

Point of Use - Department Cart Allocation

Org Group ID	HOSP1	* Department	Select Department	Business Unit/Company	Select BUnit
Display	All	Records Per Page	10	Par Location	[ ] Go

* Mandatory

Figure 54

To search for a department that may not be on the screen, type in the partial or whole Dept ID or Description, and ***click*** the Go button

When you are ready to allocate carts to a department, ***click*** on the department and the following screen should appear: **Figure 55**

Assign Cart	Business Unit	Par Location	Par Location Description	Allocated Department	Workstations: Assign	Device ID	Description
[x]	08002	08002P0009	PR-IRV C. PROC	PERI1	[ ]	BLUE	BLUE TOOTH
					[x]	HHT	Peri1 HHT
					[ ]	LAC	Local Area
					[x]	LOOP	Loop Back adapter
					[ ]	TAP	Tap Win32
					[ ]	Wire	Peri Wireless
					[ ]	WKS1	Peri1 Workstation
[x]	08002	08002P0011	EC-SURGICAL DISASTER CRT	PERI1	[ ]	BLUE	BLUE TOOTH
					[x]	HHT	Peri1 HHT
					[ ]	LAC	Local Area
					[x]	LOOP	Loop Back adapter
					[ ]	TAP	Tap Win32
					[ ]	Wire	Peri Wireless
					[ ]	WKS1	Peri1 Workstation

Figure 55

If you select a Department that does not have devices allocated, you will receive the message *"No Carts Allocated for this Department"* at the top of the screen.

Click the **Assign Cart** check box and the applicable **Assign Device ID** check box to the right of the respective Cart/Par Location. You will assign the cart id/par locations.

Once done, ***Click*** Save and the carts will be allocated to the respective workstations.

Preference Lists

Preference Lists are those lists that contain preset items within a specified Procedure (i.e. Appendectomy, Knee Replacement, etc.).

If an organization uses a current ORIS scheduling/billing system such as PICIS, GE, Epic, etc. the interface to @Par POU can be utilized through HL7 messaging. If the organization is not using an existing ORIS system they can maintain their preference lists in @Par POU here.

Most repeated procedures contain an average number of items that are used in most of the procedures. For example, in an appendectomy, there are 20 items that are used and you can set the items up on a **Preference List** called *Appendectomy.* If a preference list is set up then you can simply scan the *Appendectomy* preference list to register all 20 items automatically to the Patient.

All preferences are editable and may have items added or removed from them easily to maintain an updated list.

To setup a preference list ***select*** the **Preference List** menu option will provide you with the following screen **Figure 56**

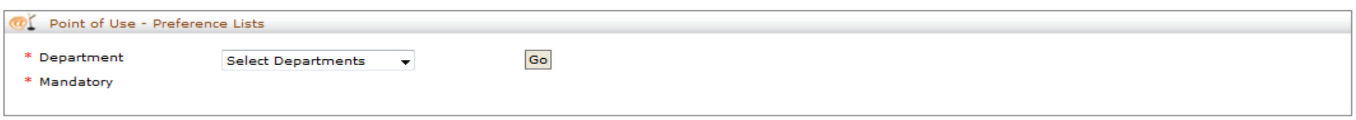


Figure 56

Select the **Department** field drop down list. ***Highlight*** a department and ***click*** on Go **Figure 57**

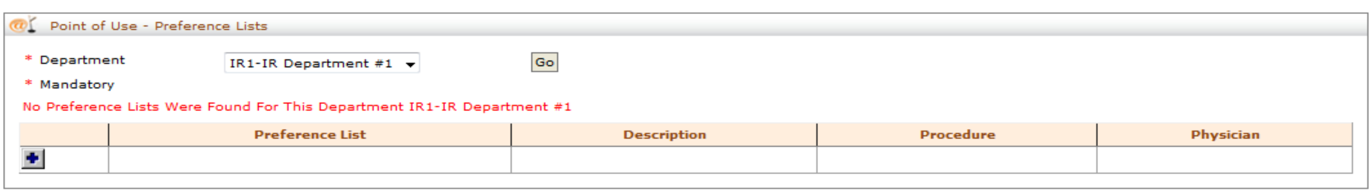


Figure 57

If there is no Preference List for this department, it will show this message. To add a new **Preference List**, ***click*** on the in the bottom left hand corner of **Figure 57** and the following screen appears **Figure 58**

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

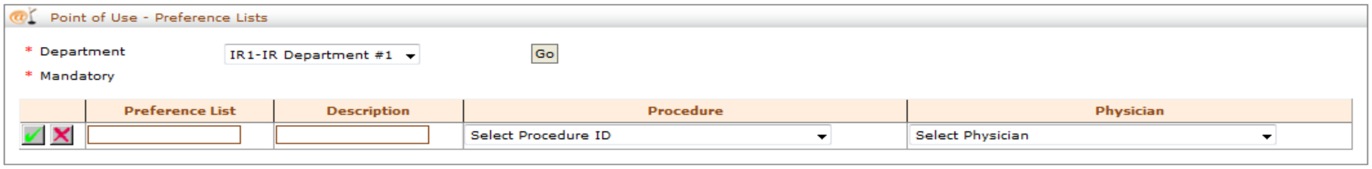


Figure 58

Enter the **Preference List**, **Description** information and ***select*** the Procedure and Physician from their respective drop down lists. To save this, ***click*** on or ***click*** on to delete and start over.

Save this **Preference List** and it appears and the next screen appears **Figure 59**

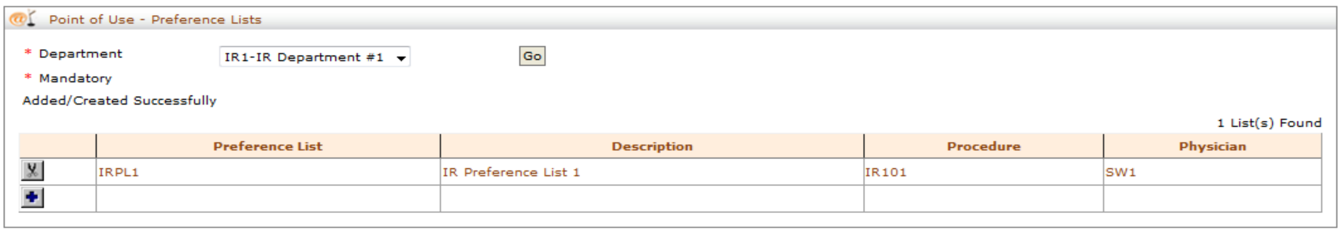


Figure 59

Items must now be added to the Preference List. To add a new item to an existing **Preference List**, ***click*** the Preference List name. The following screen will appear in **Figure 60**

Figure 60

To add an item(s) to the **Preference List**, ***click*** on the icon.

Note: Carts/Par locations **must** be allocated to the department or the following **Figure 61** message will appear.

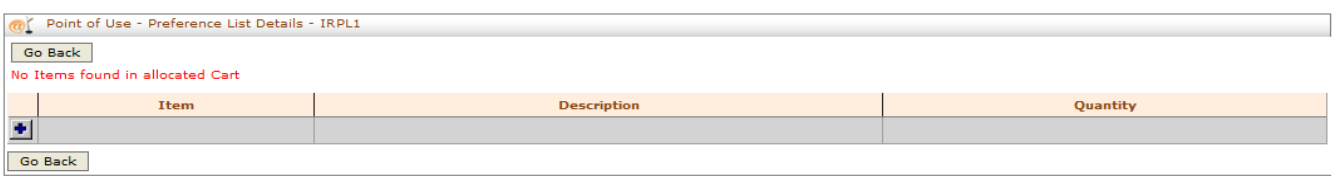


Figure 61

If Carts/Par Locations are properly allocated to a department you'll be able to add item(s) as needed. We'll continue this process from **Figure 62**

Using the drop down list, select the item(s) you wish to add to this **Preference List** and enter a **Quantity** here.

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

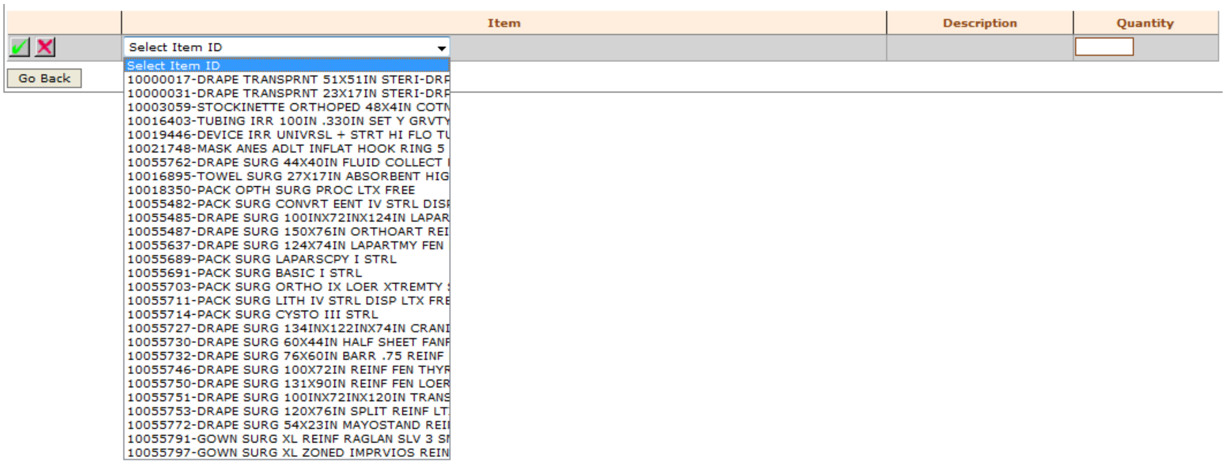


Figure 62

Click the to save this item(s), or ***Click*** the to delete it.

Continue to add all items to the **Preference List**. **Figure 63**

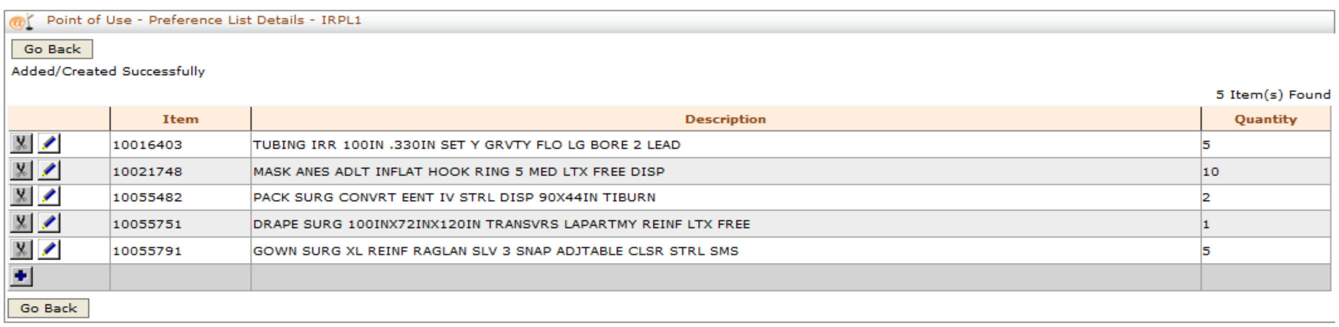


Figure 63

When you have finished adding new item(s) ***click*** on Go Back to return to the **Preference List** screen shown below in **Figure 64**

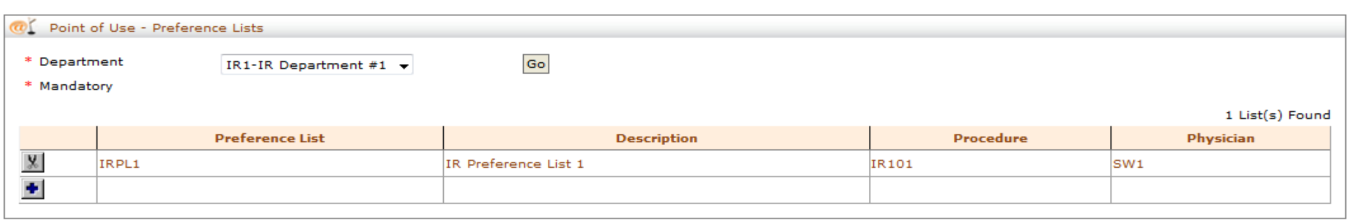


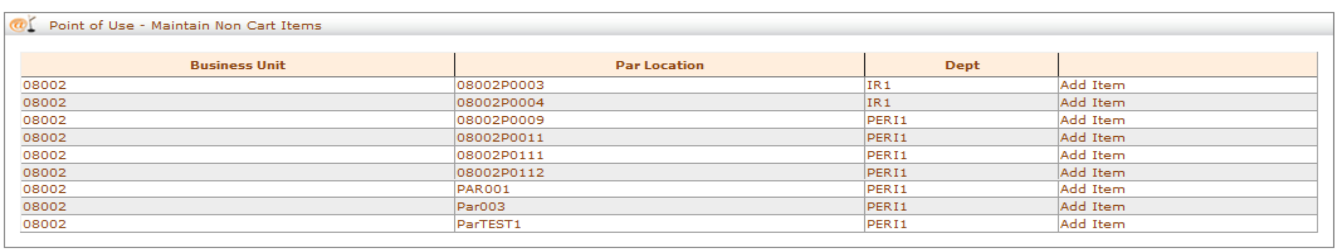
Figure 64

The Preference List creation process is done.

Note: With customers utilizing the Case Cart functionality MHS, Inc. will work with their OR Scheduling software (i.e. PICIS, Epic, GE, etc.) to build a minimum of an inbound file to incorporate the Preference List and items for the Cases. There can be outbound file requirements also to put data back into the OR systems but this is optional.

Maintain Non Cart Items

Items that are not maintained on the Cart/Par Location but need to be recorded are set up using this option. ***Select*** the **Maintain Non Cart Items** link **Figure 65**



Point of Use - Maintain Non Cart Items

Business Unit	Par Location	Dept	
08002	08002P0003	IR1	Add Item
08002	08002P0004	IR1	Add Item
08002	08002P0009	PERI1	Add Item
08002	08002P0011	PERI1	Add Item
08002	08002P0111	PERI1	Add Item
08002	08002P0112	PERI1	Add Item
08002	PAR001	PERI1	Add Item
08002	Par003	PERI1	Add Item
08002	ParTEST1	PERI1	Add Item

Figure 65

When you ***click*** a Par Location to add an item, the following screen may appear. **Figure 66**

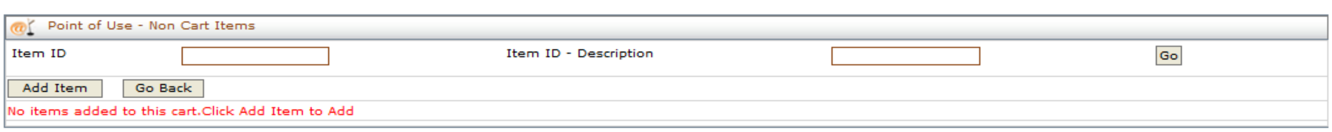
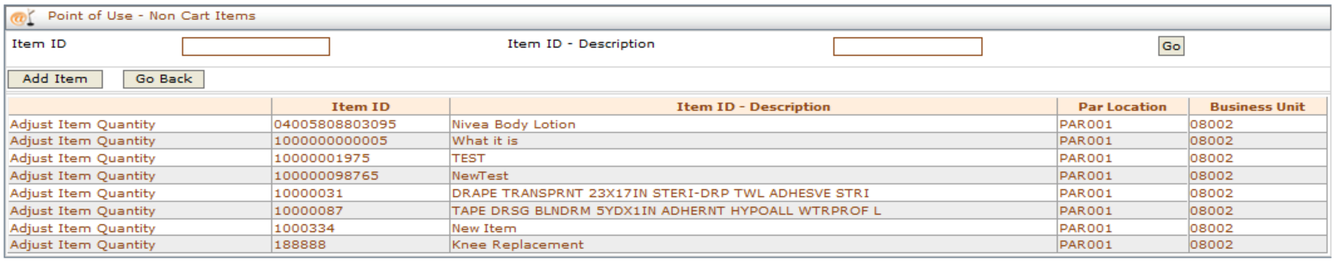


Figure 66

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

This screen indicates there have been no items added to the par location. To add an item now ***click*** the Add Item button or ***click*** the Go Back button to return to the previous screen

If you select a par location that already has items added to it, the following screen will appear **Figure 67**



Point of Use - Non Cart Items

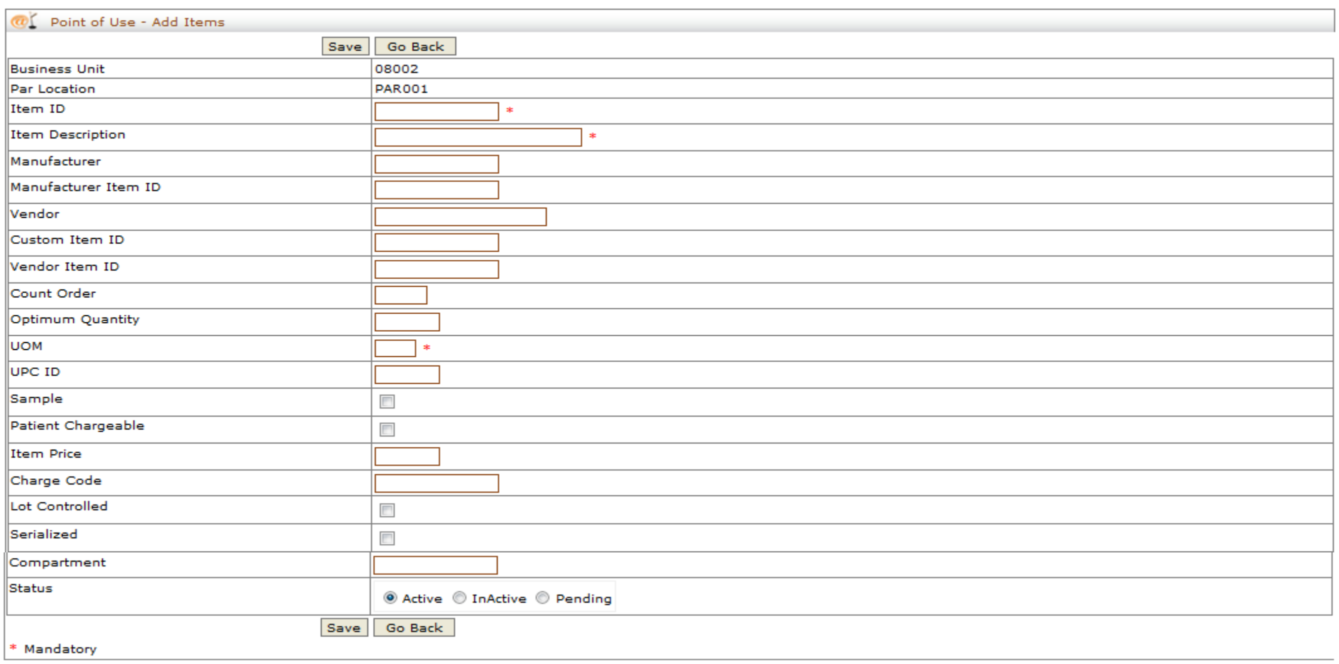
Item ID | Item ID - Description | Go

Add Item | Go Back

	Item ID	Item ID - Description	Par Location	Business Unit
Adjust Item Quantity	04005808803095	Nivea Body Lotion	PAR001	08002
Adjust Item Quantity	1000000000005	What it is	PAR001	08002
Adjust Item Quantity	10000001975	TEST	PAR001	08002
Adjust Item Quantity	100000098765	NewTest	PAR001	08002
Adjust Item Quantity	10000031	DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	PAR001	08002
Adjust Item Quantity	10000087	TAPE DRSG BLNDRM 5YDX1IN ADHERNT HYPOALL WTRPROF L	PAR001	08002
Adjust Item Quantity	1000334	New Item	PAR001	08002
Adjust Item Quantity	188888	Knee Replacement	PAR001	08002

Figure 67

This screen shows that the selected Par Location has several items added to it. To edit an existing item, ***click*** the item. To add a new item ***click*** the Add Item button and the following screen appears **Figure 68**



Point of Use - Add Items

Save | Go Back

Business Unit	08002
Par Location	PAR001
Item ID	*
Item Description	*
Manufacturer	
Manufacturer Item ID	
Vendor	
Custom Item ID	
Vendor Item ID	
Count Order	
Optimum Quantity	
UOM	*
UPC ID	
Sample	
Patient Chargeable	
Item Price	
Charge Code	
Lot Controlled	
Serialized	
Compartment	
Status	Active InActive Pending

Save | Go Back

* Mandatory

Figure 68

Enter all mandatory fields (*) and any other pertinent fields, then ***click*** the Save button

If Lot Controlled or Serialized checkboxes are checked in **Figure 68**, the following screen will appear **Figure 69** immediately after saving.

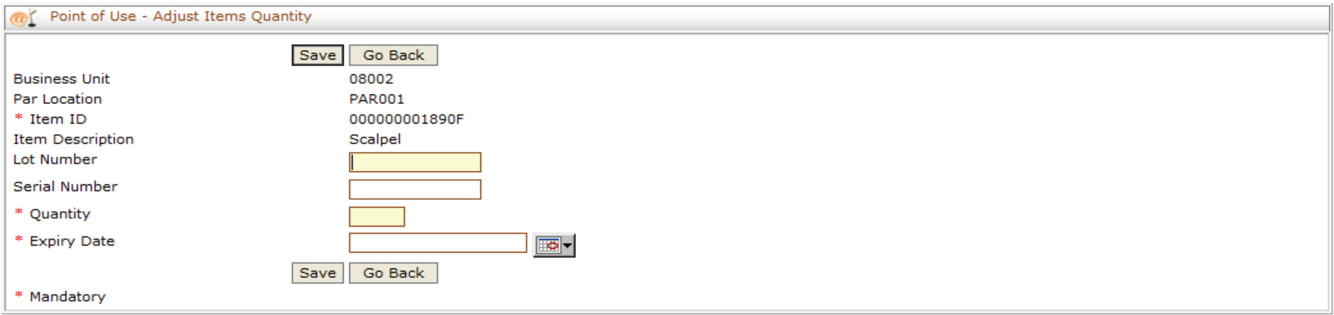


Figure 69

Enter the required information and then ***click*** the Save button to save the item.

The @Par POU is now ready for users. Refer to the POU HHT Guide.

POU Reports

All reports will have common functionality. For example…the **From** and **To Date** calendars.

Selecting the drop down window to the right of the date field will display the calendar **Figure 70**.

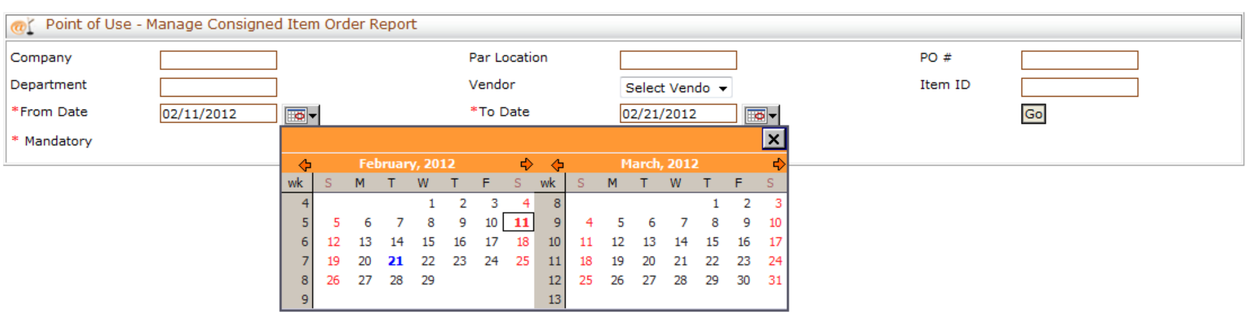
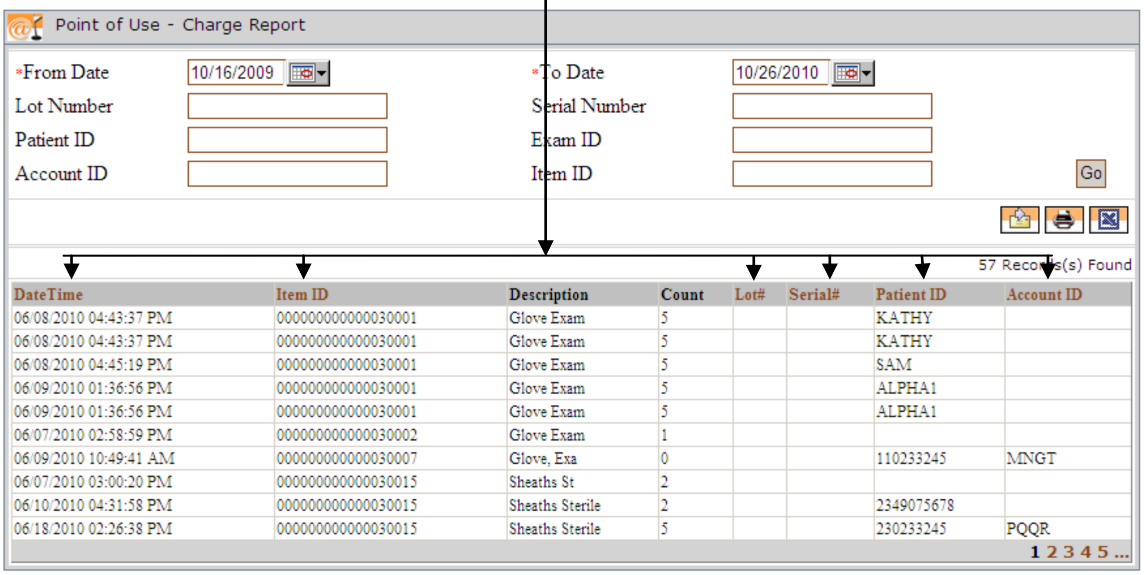


Figure 70

Change the day or month or year easily with the drop down arrows or left and right arrows shown in the upper portion of the calendar. Once the date range has been setup ***Click*** the Go button this will open the Report screen **Figure 71**.

Note: All reports allow the user to sort on each reported column. To sort columns within the reports, ***Click*** on the various **Column Names / Headers,** to sort the column in Ascending or Descending order.


Point of Use - Charge Report

*From Date 10/16/2009 | *To Date 10/26/2010
Lot Number | Serial Number
Patient ID | Exam ID
Account ID | Item ID
Go

57 Records(s) Found

DateTime	Item ID	Description	Count	Lot#	Serial#	Patient ID	Account ID
06/08/2010 04:43:37 PM	000000000000030001	Glove Exam	5			KATHY	
06/08/2010 04:43:37 PM	000000000000030001	Glove Exam	5			KATHY	
06/08/2010 04:45:19 PM	000000000000030001	Glove Exam	5			SAM	
06/09/2010 01:36:56 PM	000000000000030001	Glove Exam	5			ALPHA1	
06/09/2010 01:36:56 PM	000000000000030001	Glove Exam	5			ALPHA1	
06/07/2010 02:58:59 PM	000000000000030002	Glove Exam	1				
06/09/2010 10:49:41 AM	000000000000030007	Glove, Exa	0			110233245	MNGT
06/07/2010 03:00:20 PM	000000000000030015	Sheaths St	2				
06/10/2010 04:31:58 PM	000000000000030015	Sheaths Sterile	2			2349075678	
06/18/2010 02:26:38 PM	000000000000030015	Sheaths Sterile	5			230233245	PQQR

1 2 3 4 5 ...

Figure 71

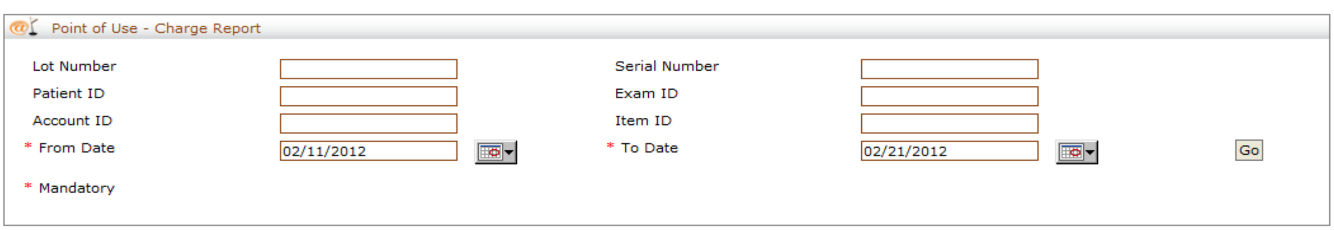
Each header field shown is a search field where you can ***enter*** in the information and ***click*** Go to narrow the data search. For example, if you know the item id, enter the number in the Item ID search box and then ***click*** Go button. This will report only the search criteria

Email, Print, and export to Excel on this and many other reports.

Charge Report

The **Charge Report** provides a snapshot of all the charges by patient, Lot #, Serial #, Account#, for a given date range. This report is used for Web/Supervisor users to view all item issuance and charges.

Select the **Charge Report** link and the following screen appears **Figure 72**

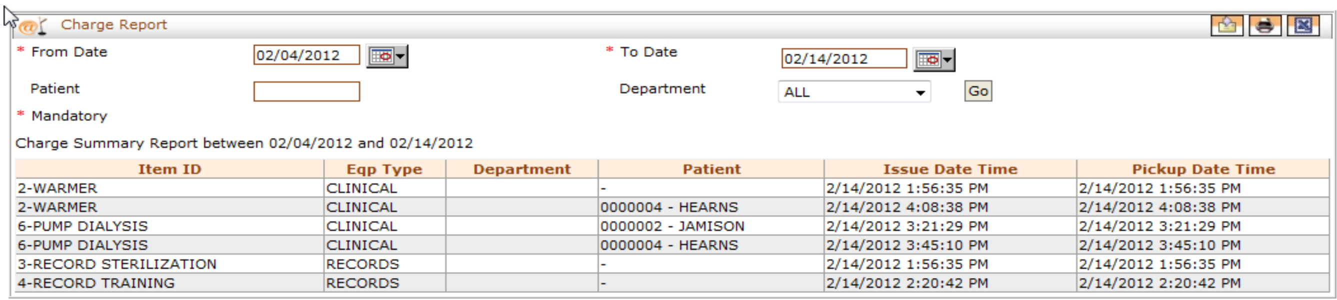

Point of Use - Charge Report

Lot Number | Serial Number
Patient ID | Exam ID
Account ID | Item ID
* From Date 02/11/2012 | * To Date 02/21/2012
Go

* Mandatory

Figure 72

Enter a date range and ***click*** the  button **Figure 73**


Charge Report
* From Date 02/04/2012 * To Date 02/14/2012
Patient Department ALL Go
* Mandatory
Charge Summary Report between 02/04/2012 and 02/14/2012

Item ID	Eqp Type	Department	Patient	Issue Date Time	Pickup Date Time
2-WARMER	CLINICAL		-	2/14/2012 1:56:35 PM	2/14/2012 1:56:35 PM
2-WARMER	CLINICAL		0000004 - HEARNS	2/14/2012 4:08:38 PM	2/14/2012 4:08:38 PM
6-PUMP DIALYSIS	CLINICAL		0000002 - JAMISON	2/14/2012 3:21:29 PM	2/14/2012 3:21:29 PM
6-PUMP DIALYSIS	CLINICAL		0000004 - HEARNS	2/14/2012 3:45:10 PM	2/14/2012 3:45:10 PM
3-RECORD STERILIZATION	RECORDS		-	2/14/2012 1:56:35 PM	2/14/2012 1:56:35 PM
4-RECORD TRAINING	RECORDS		-	2/14/2012 2:20:42 PM	2/14/2012 2:20:42 PM

Figure 73

The report will display all information on items that have been charged out during issuing. Note that some of the charges do not have a patient associated with them. This is valid and can be reviewed to see why a patient was not charged.

Review Charges/Credits

If customer wishes to review the charges before it is posted to billing, they can use this report to review all the transactions for a patient, edit information like Charge Code, Item, Quantity, etc. before posting to billing. The report also provides a way to create credits for patient so that any corrections after posting to billing can be made.

This menu option is used to review charges that have been applied to **@Par POU** system before being sent to billing system.

Note: If organizations wish to review charges before posting, the appropriate setting in Process Scheduler **MUST** be selected

The concept is to have a Billing Tech review the items, Procedure codes, etc. before sending to the Billing system. You may ***Search*** for the charges using any of the following parameters in **Figure 74**

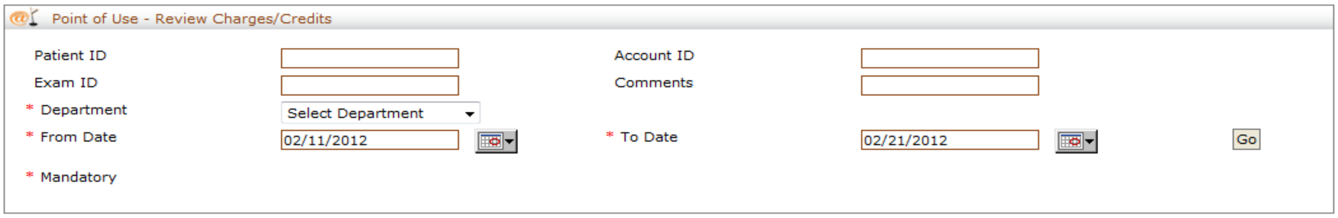
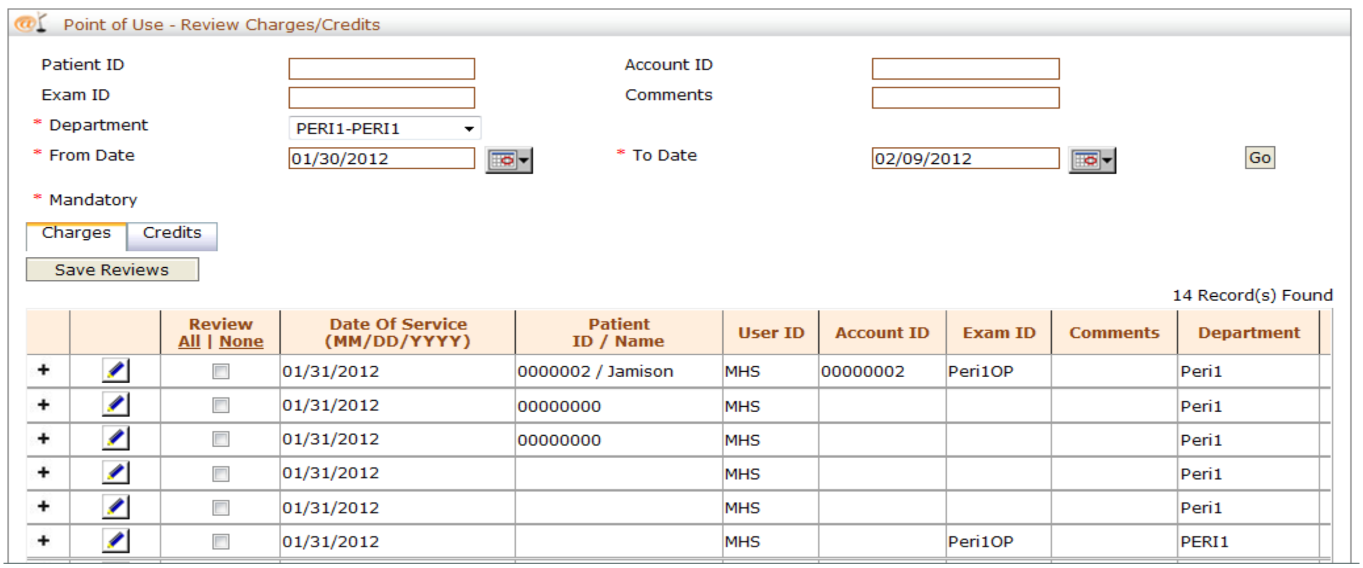


Figure 74

Select a department from the drop down list and ***modify*** the data range if necessary.

Click on the Go button **Figure 75**



		Review All | None	Date Of Service (MM/DD/YYYY)	Patient ID / Name	User ID	Account ID	Exam ID	Comments	Department
+			01/31/2012	0000002 / Jamison	MHS	00000002	Peri1OP		Peri1
+			01/31/2012	00000000	MHS				Peri1
+			01/31/2012	00000000	MHS				Peri1
+			01/31/2012		MHS				Peri1
+			01/31/2012		MHS				Peri1
+			01/31/2012		MHS		Peri1OP		PERI1

Figure 75

Charges Tab

The report will default on the **Charges** tab and display all charges within the selected date range.

To drill down and view the details of a line ***click*** the **+** button – **Figure 76**

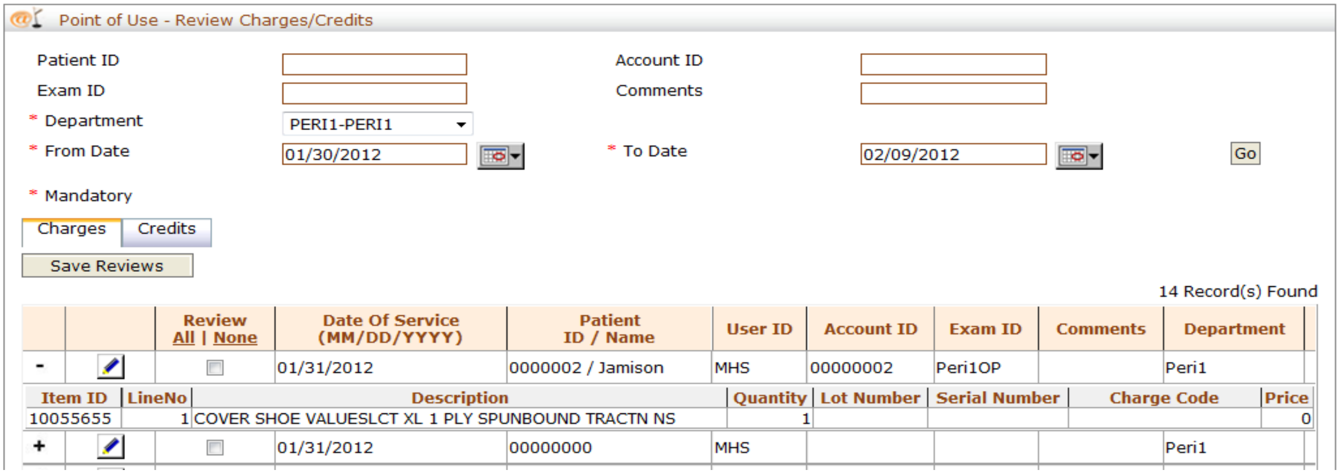


Figure 76

The staff responsible for reviewing the procedures and issues can now review each item.

To review, ***click*** the icon next to the line to review. **Figure 77** appears

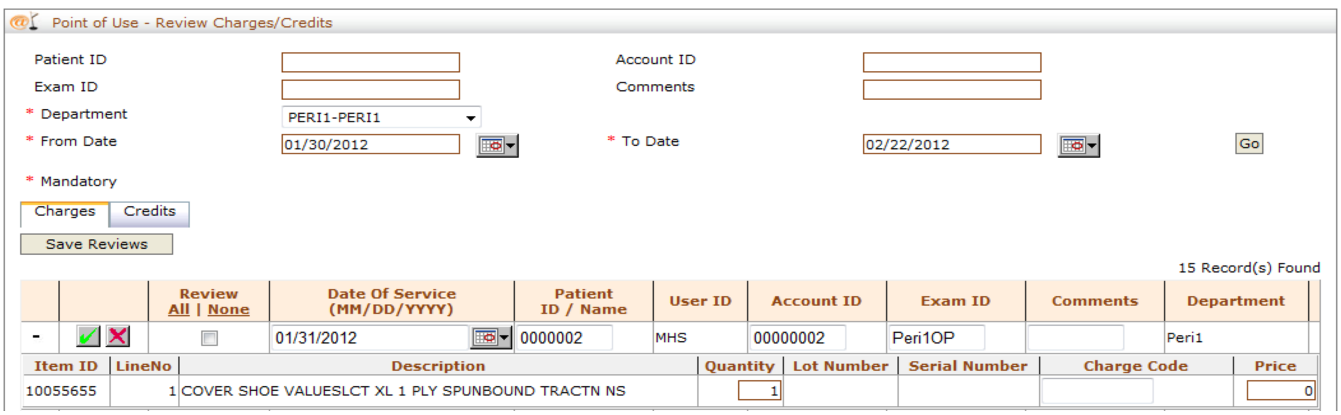


Figure 77

The reviewer can now edit Patient ID/Name, Account ID, Exam ID, Comments, Quantity, Charge Code, and Price. See **Figure 78**

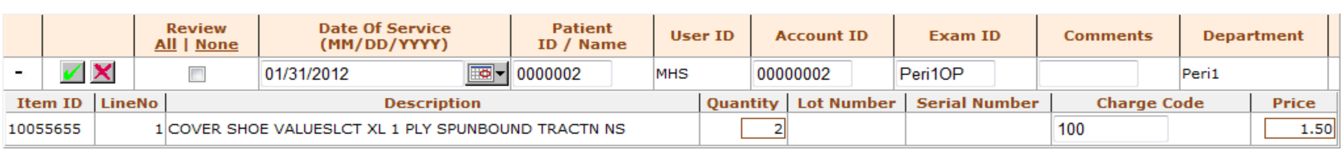


Figure 78

Once a line is edited or reviewed, staff will ***click*** the icon to save the changes. When staff is done with line item and is satisfied with the information, they ***check*** the inbox under **Review** – **All | None** column.

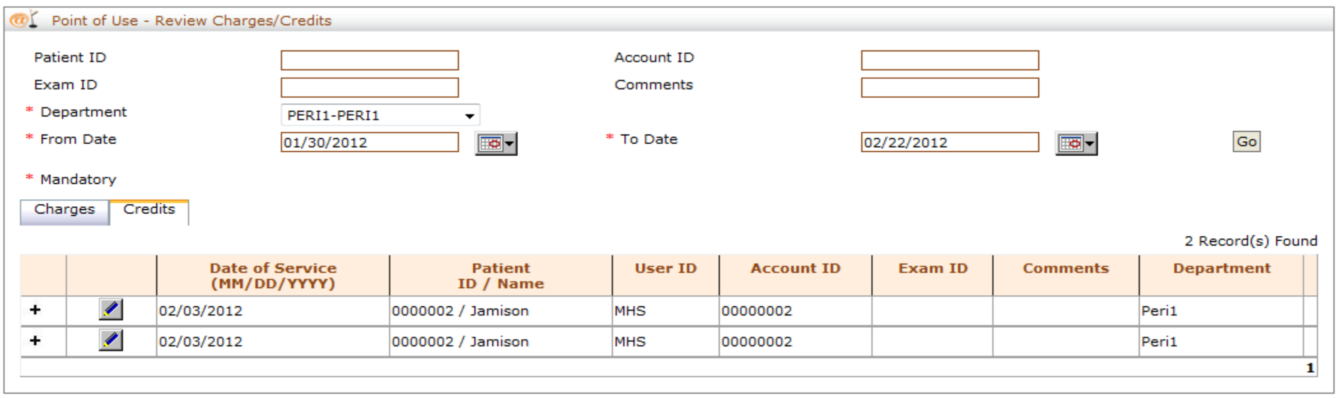
When all reviews are complete and checked, staff ***clicks*** the Save Reviews button and this flags those reviewed items to be processed based on the Process Parameters setting.

Prior to saving the review, staff can edit items or remove items using either icon or icon.

Once the item has been reviewed and saved it will no longer appear on this report.

Credit Tab

Click the **Credit** Tab **Figure 79**



Point of Use - Review Charges/Credits

Patient ID		Account ID	
Exam ID		Comments	
* Department	PERI1-PERI1		
* From Date	01/30/2012	* To Date	02/22/2012

* Mandatory

Charges | Credits

2 Record(s) Found

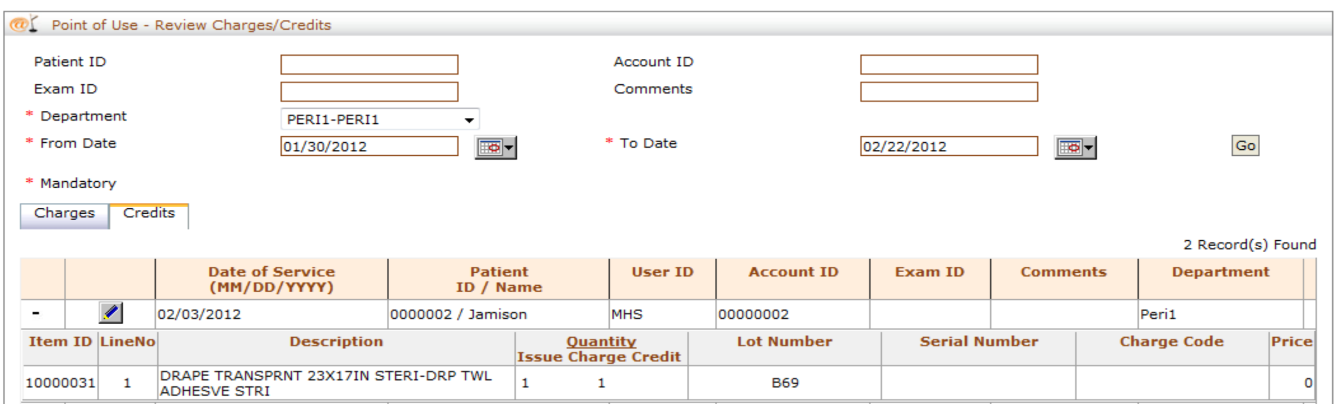
		Date of Service (MM/DD/YYYY)	Patient ID / Name	User ID	Account ID	Exam ID	Comments	Department
+		02/03/2012	0000002 / Jamison	MHS	00000002			Peri1
+		02/03/2012	0000002 / Jamison	MHS	00000002			Peri1

1

Figure 79

Note: Staff will run same process/workflow for Credits as was done for Charges – When the items have been credited the QOH in POU will be changed

To drill down and view the details of a line ***click*** the **+** button – **Figure 80**



Point of Use - Review Charges/Credits

Patient ID		Account ID	
Exam ID		Comments	
* Department	PERI1-PERI1		
* From Date	01/30/2012	* To Date	02/22/2012

* Mandatory

Charges | Credits

2 Record(s) Found

		Date of Service (MM/DD/YYYY)	Patient ID / Name	User ID	Account ID	Exam ID	Comments	Department
-		02/03/2012	0000002 / Jamison	MHS	00000002			Peri1

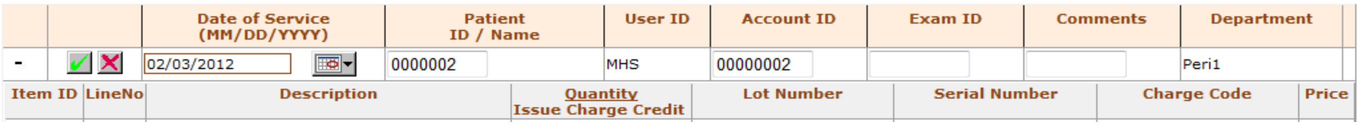
Item ID	LineNo	Description	Quantity Issue	Charge Credit	Lot Number	Serial Number	Charge Code	Price
10000031	1	DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	1	1	B69			0

Figure 80

The staff responsible for reviewing the procedures and credits can now review each item.

To review, ***click*** the icon next to the line to review. **Figure 81** appears

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621



		Date of Service (MM/DD/YYYY)	Patient ID / Name	User ID	Account ID	Exam ID	Comments	Department
-		02/03/2012	0000002	MHS	00000002			Peri1

Item ID	LineNo	Description	Quantity Issue Charge Credit	Lot Number	Serial Number	Charge Code	Price

Figure 81

Lot/Serial Tracking Report

The **Lot /Serial Tracking Report** can be used to track which lot /serial exist in the hospital and their specific storage locations, and in case it was issued, to which patient it was issued, so that hospitals can better manage product recalls.

Select the **Lot/Serial Tracking Report** link **Figure 82**

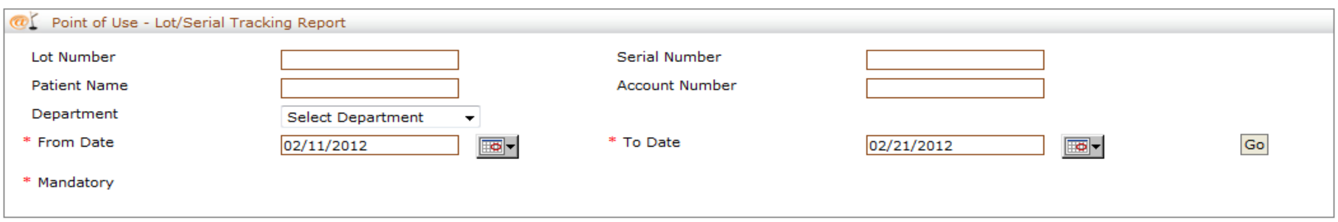
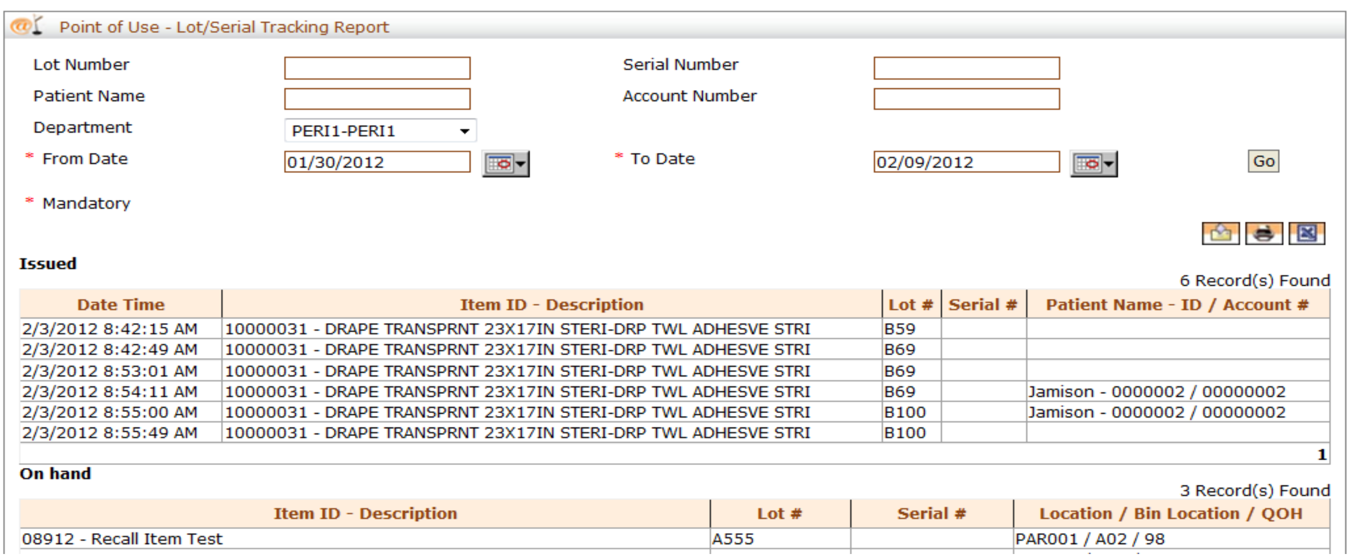


Figure 82

Select a department and date range and ***click*** the Go button **Figure 83**



Issued

6 Record(s) Found

Date Time	Item ID - Description	Lot #	Serial #	Patient Name - ID / Account #
2/3/2012 8:42:15 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B59		
2/3/2012 8:42:49 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B69		
2/3/2012 8:53:01 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B69		
2/3/2012 8:54:11 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B69		Jamison - 0000002 / 00000002
2/3/2012 8:55:00 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B100		Jamison - 0000002 / 00000002
2/3/2012 8:55:49 AM	10000031 - DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	B100		

1

On hand

3 Record(s) Found

Item ID - Description	Lot #	Serial #	Location / Bin Location / QOH
08912 - Recall Item Test	A555		PAR001 / A02 / 98

Figure 83

The following information will appear regarding Issued items:

Date Time | Item ID – Description| Lot # | Serial # | Patient Name – ID/Account #

If there are Lot or Serial controlled items on hand this information will appear below the Issued section in the On hand section of the report and following items will display

Item ID – Description | Lot # | Serial # | Location/Bin Location/QOH

Item Usage Report

The **Item Usage Report** helps Materials Management Staff to analyze usage at each location.

The report can be accessed from the **Quantity On Hand Report** or by ***selecting*** the **Item Usage Report** link **Figure 84**

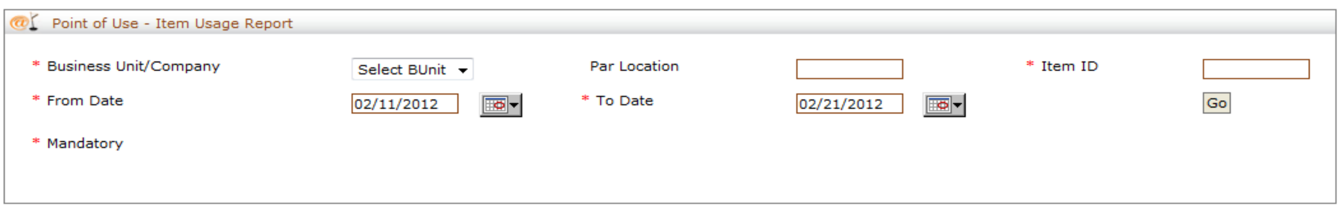
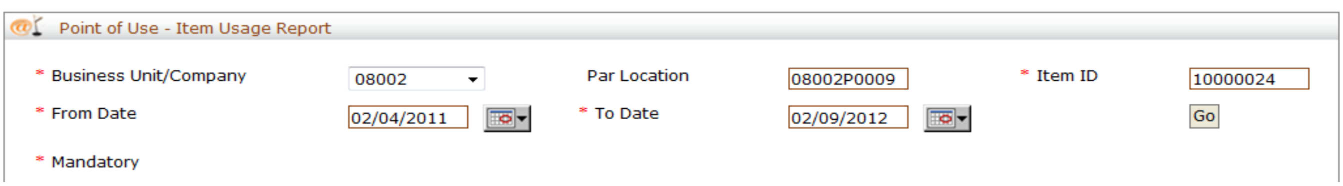


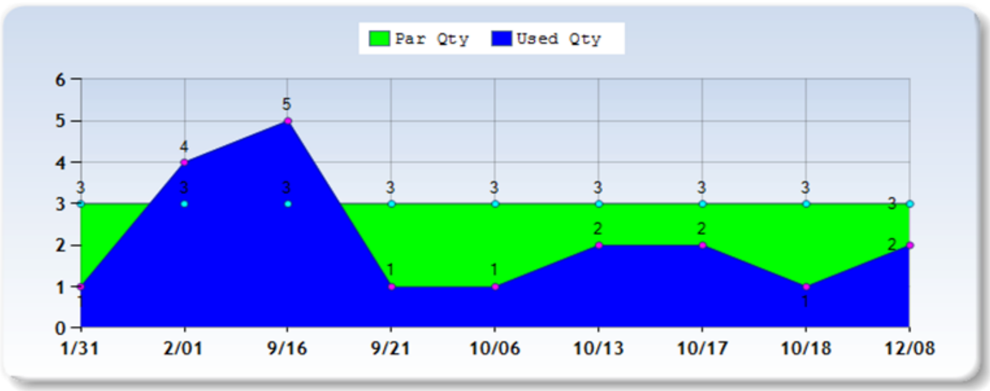
Figure 84

Select a **Business Unit/Company** from the drop down list and a data range then ***click*** the Go button **Figure 85**



Item ID : 10000024

Business Unit/Company : 08002 **Par Location :** 08002P0009



	Qty	Date
Min Item Usage	1	01/31/2012
Max Item Usage	5	09/16/2011
Average Item Usage	2.11 Per Day	

Figure 85

This report allows a supervisor usage information on an item over a defined period of time. The graph displays Par Qty vs. Used quantity.

The bottom of the report will display details of:

- Minimum Item Usage
- Maximum Item Usage
- Average Item Usage

Par Optimization Report

The **Par Optimization Report** helps Materials Management Staff to analyze usage at each location and determine appropriate Par Levels based on the usage history.

The report will use Average Usage as a method to calculate and recommend Optimum par levels for each item at a given location.

Based on the user privilege and security provided to @Par, the user can also update the Par Levels in MMIS based on the recommendations.

Select the **Par Optimization Report** link **Figure 86**

Point of Use - Par Optimization Report

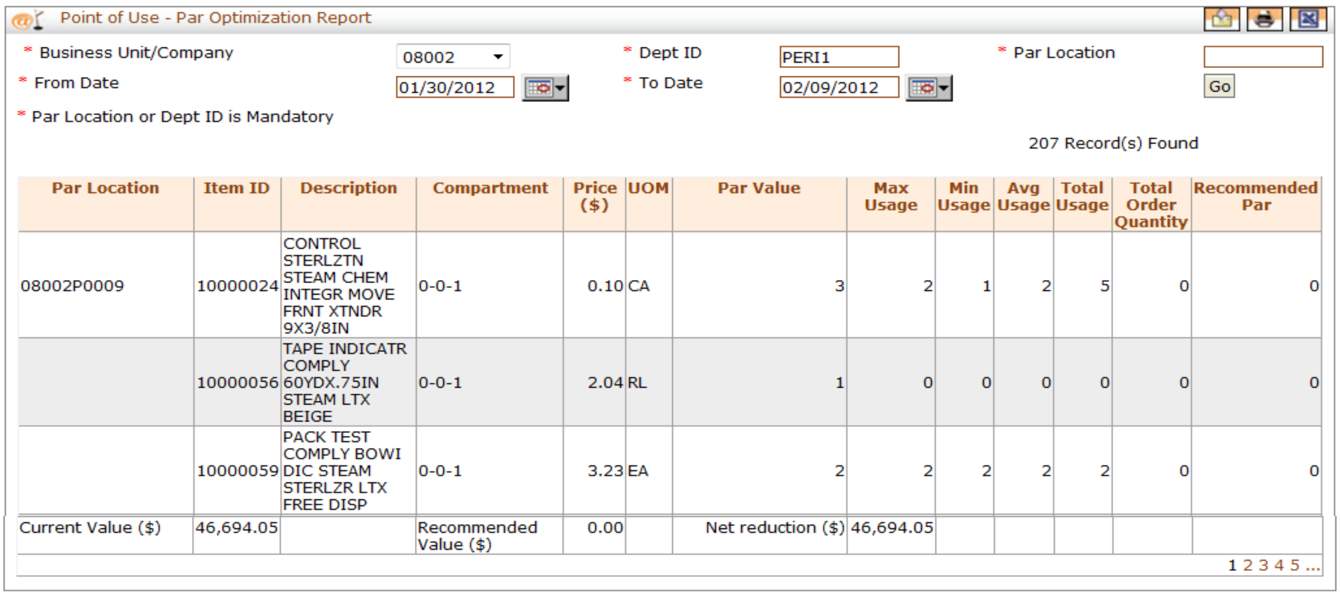
* Business Unit/Company	Select BU	* Dept ID		* Par Location	
* From Date	02/11/2012	* To Date	02/21/2012		Go

* Par Location or Dept ID is Mandatory

Figure 86

Select a **Business Unit/Company** from the drop down list and enter either a **Dept ID**, **Par Location**, or both.

Select a date range and ***click*** the Go button **Figure 87**



Par Location	Item ID	Description	Compartment	Price ($)	UOM	Par Value	Max Usage	Min Usage	Avg Usage	Total Usage	Total Order Quantity	Recommended Par
08002P0009	10000024	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	0-0-1	0.10	CA	3	2	1	2	5	0	0
	10000056	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	0-0-1	2.04	RL	1	0	0	0	0	0	0
	10000059	PACK TEST COMPLY BOWI DIC STEAM STERLZR LTX FREE DISP	0-0-1	3.23	EA	2	2	2	2	2	0	0
Current Value ($)	46,694.05		Recommended Value ($)	0.00		Net reduction ($)	46,694.05					

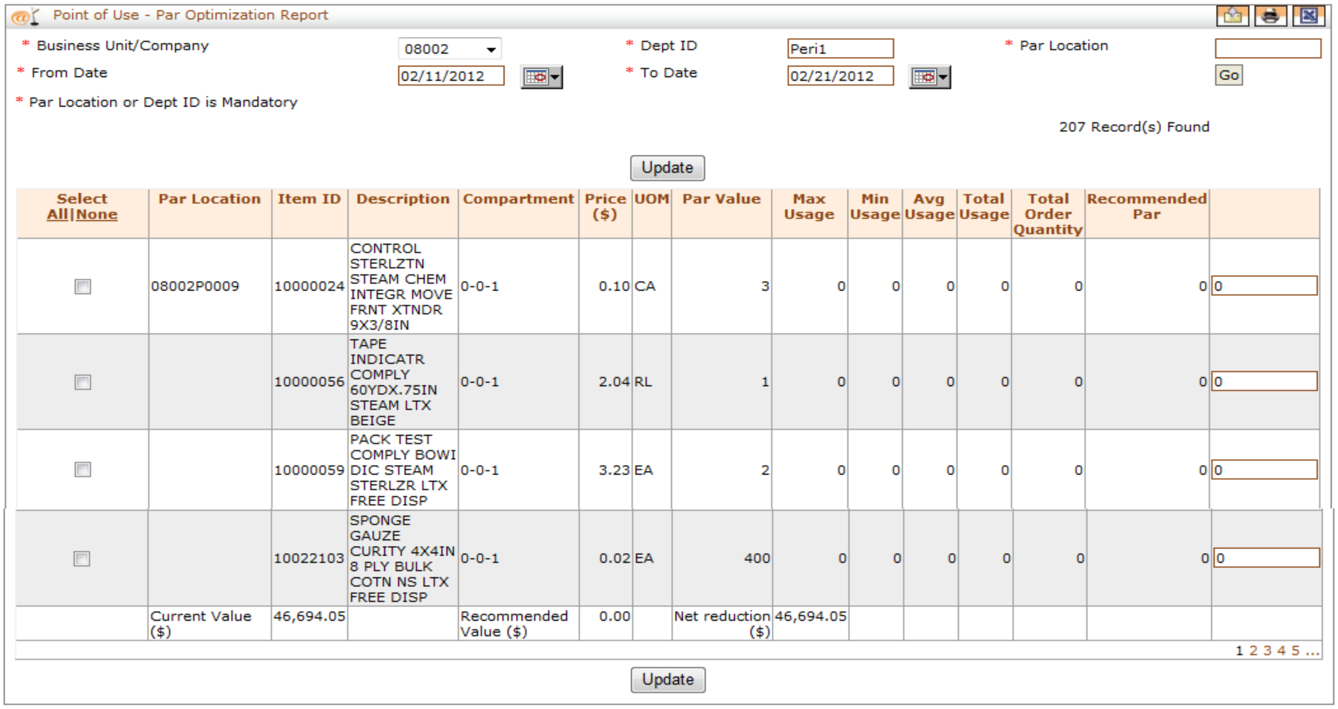
1 2 3 4 5 ...

Figure 87

This report is used to display an Item's Usage vs. the Item's Par value. Over time, this report is very valuable as it can assist a supervisor in evaluating an items Par Level, Cost, etc.

If the user is set up with the following **Profile Parameter**s in **Figure 88**, the report will display edit field in **Figure 89**

Figure 88



Select All|None	Par Location	Item ID	Description	Compartment	Price ($)	UOM	Par Value	Max Usage	Min Usage	Avg Usage	Total Usage	Total Order Quantity	Recommended Par	
	08002P0009	10000024	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	0-0-1	0.10	CA	3	0	0	0	0	0	0	0
		10000056	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	0-0-1	2.04	RL	1	0	0	0	0	0	0	0
		10000059	PACK TEST COMPLY BOWI DIC STEAM STERLZR LTX FREE DISP	0-0-1	3.23	EA	2	0	0	0	0	0	0	0
		10022103	SPONGE GAUZE CURITY 4X4IN 8 PLY BULK COTN NS LTX FREE DISP	0-0-1	0.02	EA	400	0	0	0	0	0	0	0
	Current Value ($)	46,694.05		Recommended Value ($)	0.00		Net reduction ($)	46,694.05						

Figure 89

The user now has the ability to modify the Par Level from this report. First ***click*** in the check box of the item to be modified and then ***enter*** the new par value to the right of the Recommended Par column.

When satisfied of all editing***, click*** the Update button.

The update to some MMIS ERP systems is done automatically and the next time the Par Location is downloaded, the new Par Quantity will be displayed.

Compliance Summary Report

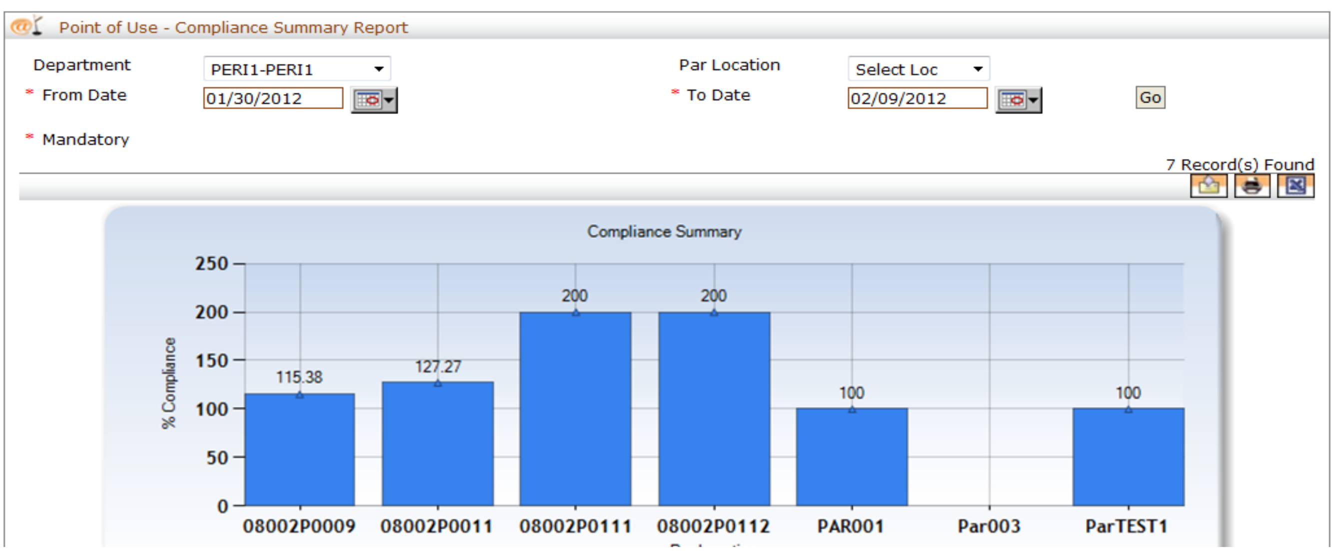
The **Compliance Summary Report** will help departments to determine percentage compliance of system utilization by the clinical staff. It will help measure the success of the scanning technology implemented and drive compliance.

The report will allow measurement of a departmental compliance in scanning items at time of issue. The measurement can be used to drive compliance up which helps to ensure the department doesn't lose anything on lost charges and thus increase their reimbursement.

Select the **Compliance Summary Report** link **Figure 90**

Figure 90

Select a date range and ***click*** the Go button **Figure 91**



Par Location	Issue Quantity	Issue Value ($)	Return Quantity	Return Value ($)	Unaccounted Quantity	Unaccounted Value ($)	% Compliance	% Dollars Captured
08002P0009	22	32.57	0	0.00	4	7.40	115.38	118.51
08002P0011	8	102.28	0	0.00	3	2.06	127.27	101.97
08002P0111	0	0.00	0	0.00	2	2.26	200.00	200.00
08002P0112	0	0.00	0	0.00	2	0.73	200.00	200.00
PAR001	10	0.00	4	30.50	0	0.00	100.00	100.00
Par003	0	0.00	0	0.00	0	0.00	0.00	0.00
ParTEST1	2	0.00	0	0.00	0	0.00	100.00	0.00
								1

Figure 91

As you can see the report breaks out by Par Location, within specific department, the value of issue quantity vs. unaccounted quantity.

Compliance Detail Report

The **Compliance Details Report** will help departments track where the compliance is lacking, which specific items are not being scanned during utilization, so that the departments can analyze the reasons for non-compliance and take appropriate measure to drive compliance.

The report will break down the report into details which will help measure the department's compliance. Specifically, it will allow departments to identify items staff are not compliant in scanning items at time of the issue. This should help the department in making business decisions on why compliance is low on items.

Access to this report is available from the **Compliance Summary Report** or from **Compliance Detail Report** link **Figure 92**

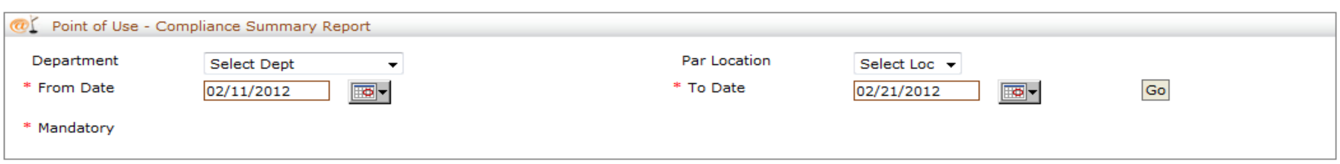
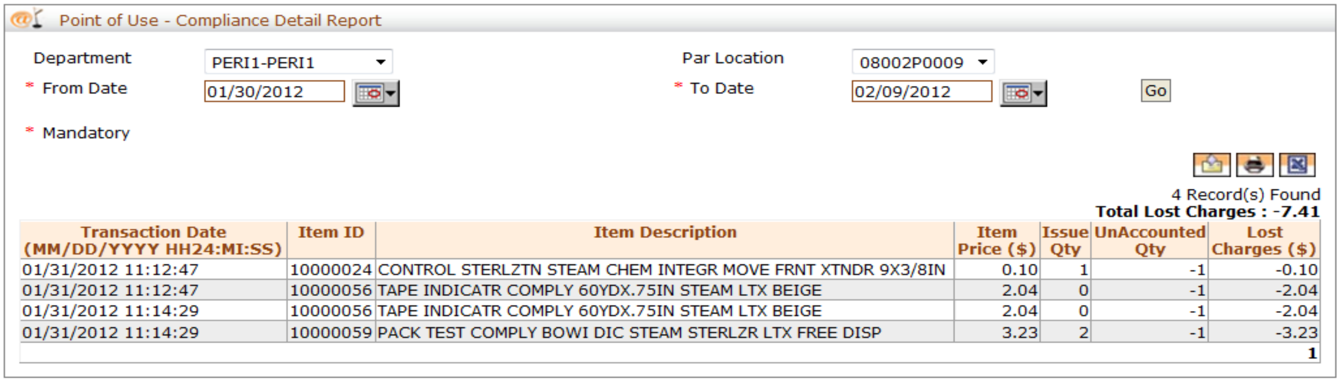


Figure 92

Select a date range and ***click*** the Go button **Figure 93**



Point of Use - Compliance Detail Report

Department: PERI1-PERI1   Par Location: 08002P0009

* From Date: 01/30/2012   * To Date: 02/09/2012   Go

* Mandatory

4 Record(s) Found

Total Lost Charges : -7.41

Transaction Date (MM/DD/YYYY HH24:MI:SS)	Item ID	Item Description	Item Price ($)	Issue Qty	UnAccounted Qty	Lost Charges ($)
01/31/2012 11:12:47	10000024	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	0.10	1	-1	-0.10
01/31/2012 11:12:47	10000056	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	2.04	0	-1	-2.04
01/31/2012 11:14:29	10000056	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	2.04	0	-1	-2.04
01/31/2012 11:14:29	10000059	PACK TEST COMPLY BOWI DIC STEAM STERLZR LTX FREE DISP	3.23	2	-1	-3.23

1

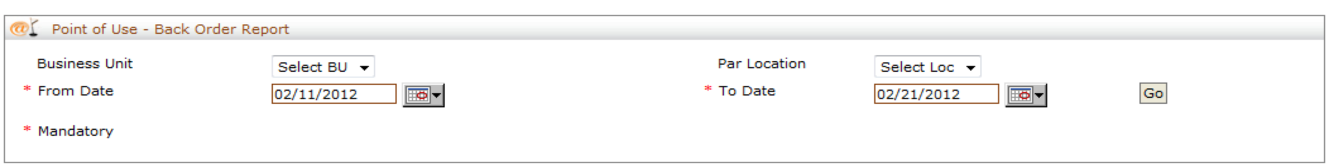
Figure 93

Back Order Report

The **Back Order Report** will help Department's Materials Coordinators track Back Order for a specific par location.

This report provides information on any and all items that have zero quantity Putaway, or partial Putaway amounts. To search this report, you will need the following information.

Select the **Back Order Report** link **Figure 94**



Point of Use - Back Order Report

Business Unit: Select BU   Par Location: Select Loc

* From Date: 02/11/2012   * To Date: 02/21/2012   Go

* Mandatory

Figure 94

Enter date range and ***click*** the Go button **Figure 95**

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

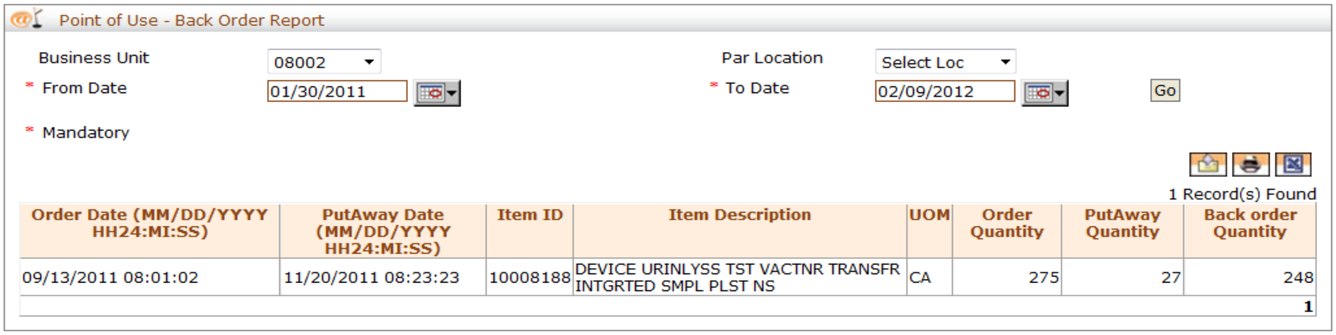


Figure 95

The data displayed will show actual Order (Ordered) Quantity vs. Quantity that was actually Putaway.

Note: Red labeled items = 0 or no amounts Putaway Black labeled items = Partial amounts Putaway

Physician Usage Report

The **Physician Usage Report** will help Department's track usage by procedure and by physician. The report can be utilized to compare utilization and cost per procedure by physicians. The report will also help in tracking Preference Card utilization and clean-up of Preference Cards based on actual utilization.

Select the **Physician Usage Report** link **Figure 96**

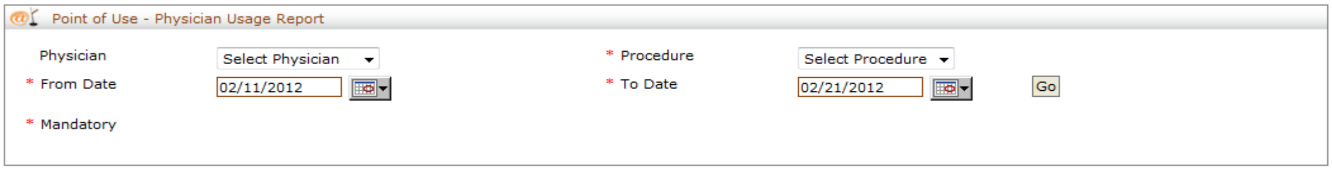
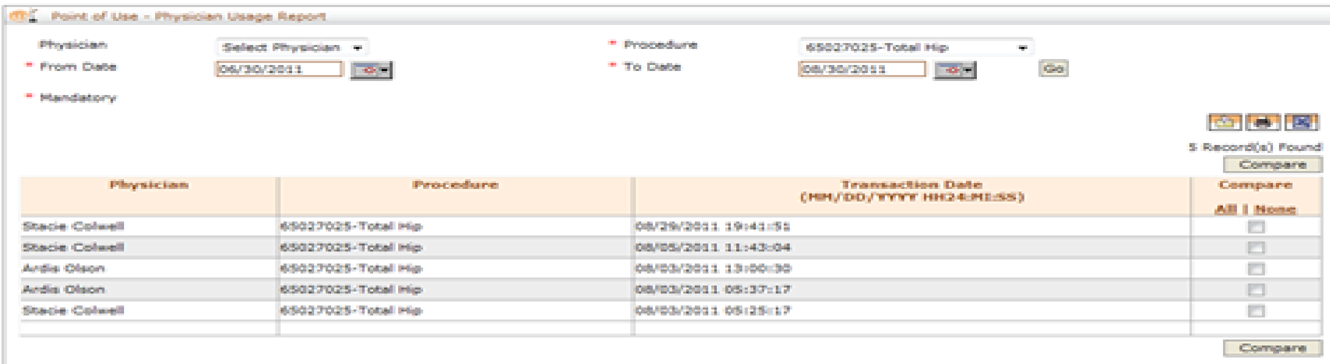


Figure 96

Select required parameters and ***click*** the Go button **Figure 97**

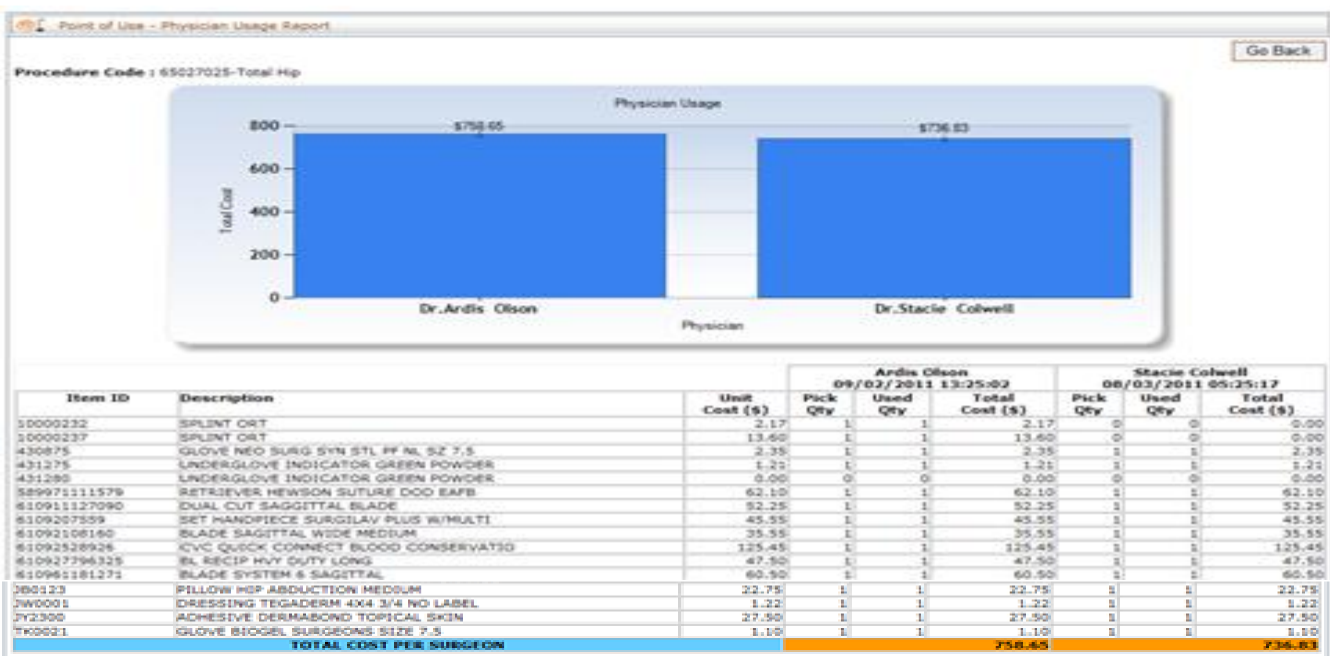


Physician	Procedure	Transaction Date (MM/DD/YYYY HH24:MI:SS)	Compare All | None
Stacie Colwell	65027025-Total Hip	08/29/2011 19:41:51	
Stacie Colwell	65027025-Total Hip	08/05/2011 11:43:04	
Ardis Olson	65027025-Total Hip	08/03/2011 13:00:30	
Ardis Olson	65027025-Total Hip	08/03/2011 05:37:17	
Stacie Colwell	65027025-Total Hip	08/03/2011 05:25:17	

Figure 97

The screen shows the **Physician** name, **Procedure, Transaction Date & Time** and provides a check box under the **Compare** column. This allows comparing various physicians' usage of items for same procedures performed.

To compare data, ***place*** a check mark in the check box for the physicians to compare and ***click*** the Go button **Figure 98**



			Ardis Olson 09/02/2011 13:25:02			Stacie Colwell 08/03/2011 05:25:17		
Item ID	**Description**	**Unit Cost ($)**	**Pick Qty**	**Used Qty**	**Total Cost ($)**	**Pick Qty**	**Used Qty**	**Total Cost ($)**
10000232	SPLINT ORT	2.17	1	1	2.17	0	0	0.00
10000237	SPLINT ORT	13.60	1	1	13.60	0	0	0.00
430875	GLOVE NEO SURG SYN STL PF NL SZ 7.5	2.35	1	1	2.35	1	1	2.35
431275	UNDERGLOVE INDICATOR GREEN POWDER	1.21	1	1	1.21	1	1	1.21
431280	UNDERGLOVE INDICATOR GREEN POWDER	0.00	0	0	0.00	0	0	0.00
589971111579	RETRIEVER HEWSON SUTURE DOD EAFB	62.10	1	1	62.10	1	1	62.10
610911127090	DUAL CUT SAGGITTAL BLADE	52.25	1	1	52.25	1	1	52.25
6109207559	SET HANDPIECE SURGILAV PLUS W/MULTI	45.55	1	1	45.55	1	1	45.55
61092108160	BLADE SAGITTAL WIDE MEDIUM	35.55	1	1	35.55	1	1	35.55
61092528926	CVC QUICK CONNECT BLOOD CONSERVATIO	125.45	1	1	125.45	1	1	125.45
610927796325	BL RECIP HVY DUTY LONG	47.50	1	1	47.50	1	1	47.50
610961181271	BLADE SYSTEM 6 SAGITTAL	60.50	1	1	60.50	1	1	60.50
JB0123	PILLOW HIP ABDUCTION MEDIUM	22.75	1	1	22.75	1	1	22.75
JW0001	DRESSING TEGADERM 4X4 3/4 NO LABEL	1.22	1	1	1.22	1	1	1.22
JY2300	ADHESIVE DERMABOND TOPICAL SKIN	27.50	1	1	27.50	1	1	27.50
TK0021	GLOVE BIOGEL SURGEONS SIZE 7.5	1.10	1	1	1.10	1	1	1.10
TOTAL COST PER SURGEON					758.65			736.83

Figure 98

This report gives a manager a very good comparison between physicians within same procedures. Managers may track why differences occur to manage future procedures.

Quantity On Hand Report

The **Quantity On Hand Report** will provide a snapshot of inventory being carried and the value at a given location at any given time.

This report lists the quantity on hand per items. This is the item quantity that should be physically on the Cart ID/Par Location

Select the **Quantity On Hand Report** link and ***click*** the button **Figure 99**

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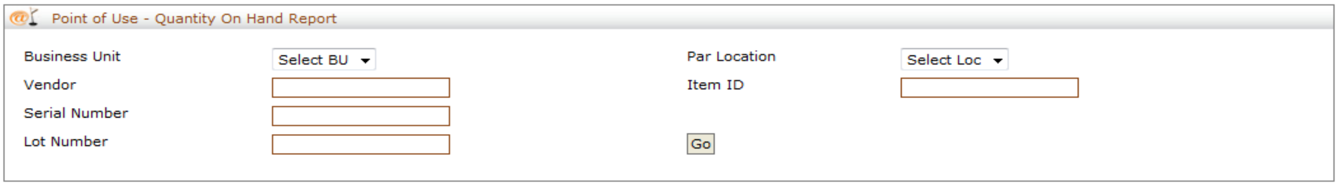
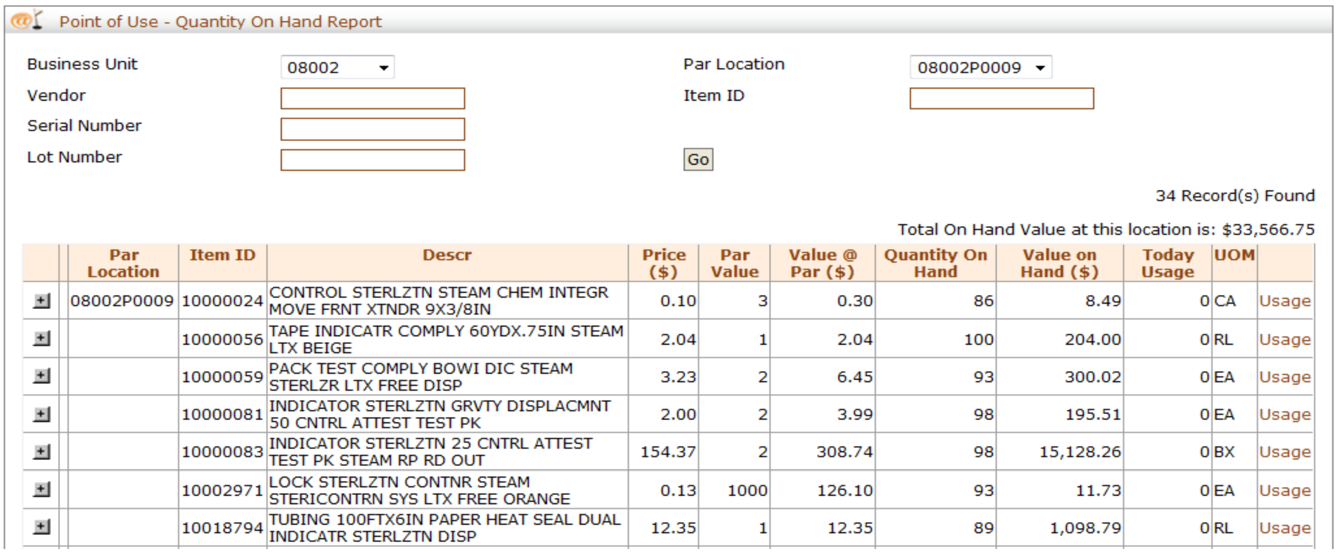

Point of Use - Quantity On Hand Report

Business Unit	Select BU	Par Location	Select Loc
Vendor		Item ID	
Serial Number			
Lot Number		Go	

Figure 99

Select parameters for data capture and ***click*** the Go button **Figure 100**


Point of Use - Quantity On Hand Report

Business Unit	08002	Par Location	08002P0009
Vendor		Item ID	
Serial Number			
Lot Number		Go	

34 Record(s) Found

Total On Hand Value at this location is: $33,566.75

	Par Location	Item ID	Descr	Price ($)	Par Value	Value @ Par ($)	Quantity On Hand	Value on Hand ($)	Today Usage	UOM	
+	08002P0009	10000024	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	0.10	3	0.30	86	8.49	0	CA	Usage
+		10000056	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	2.04	1	2.04	100	204.00	0	RL	Usage
+		10000059	PACK TEST COMPLY BOWI DIC STEAM STERLZR LTX FREE DISP	3.23	2	6.45	93	300.02	0	EA	Usage
+		10000081	INDICATOR STERLZTN GRVTY DISPLACMNT 50 CNTRL ATTEST TEST PK	2.00	2	3.99	98	195.51	0	EA	Usage
+		10000083	INDICATOR STERLZTN 25 CNTRL ATTEST TEST PK STEAM RP RD OUT	154.37	2	308.74	98	15,128.26	0	BX	Usage
+		10002971	LOCK STERLZTN CONTNR STEAM STERICONTRN SYS LTX FREE ORANGE	0.13	1000	126.10	93	11.73	0	EA	Usage
+		10018794	TUBING 100FTX6IN PAPER HEAT SEAL DUAL INDICATR STERLZTN DISP	12.35	1	12.35	89	1,098.79	0	RL	Usage

Figure 100

The report contains the following fields:

Par Location – Cart ID/Par Location

Item ID – Item ID

Descr – Item's description

Price (s) – Item's price

Par Value – The ERP systems Par value for this item

Value @ Par ($) – The value at Par level

Qty on Hand – The current quantity on hand

Value on Hand ($) – The value of the on hand amount

Today Usage – The total usage amount

UOM – The **U**nit **O**f **M**easure.

Clicking on the **Usage** link at the end of a line will move automatically to the **Item Usage Report** discussed previously in this document.

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Issues W/O Patient Report

This report can be used to track any transactions done using the system where a patient was not selected for transaction.

This will help hospitals track any loans they make to other departments, any transactions a Materials Coordinator would do to remove wasted, expired, obsolete products, etc. with a reason code that can be setup for identifying each of these transactions.

This report is also used to view recalled items that are removed from on hand quantity.

Select the **Issues W/O Patient Report** link **Figure 101**

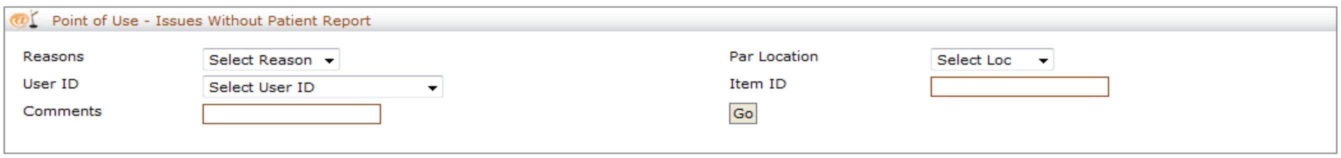
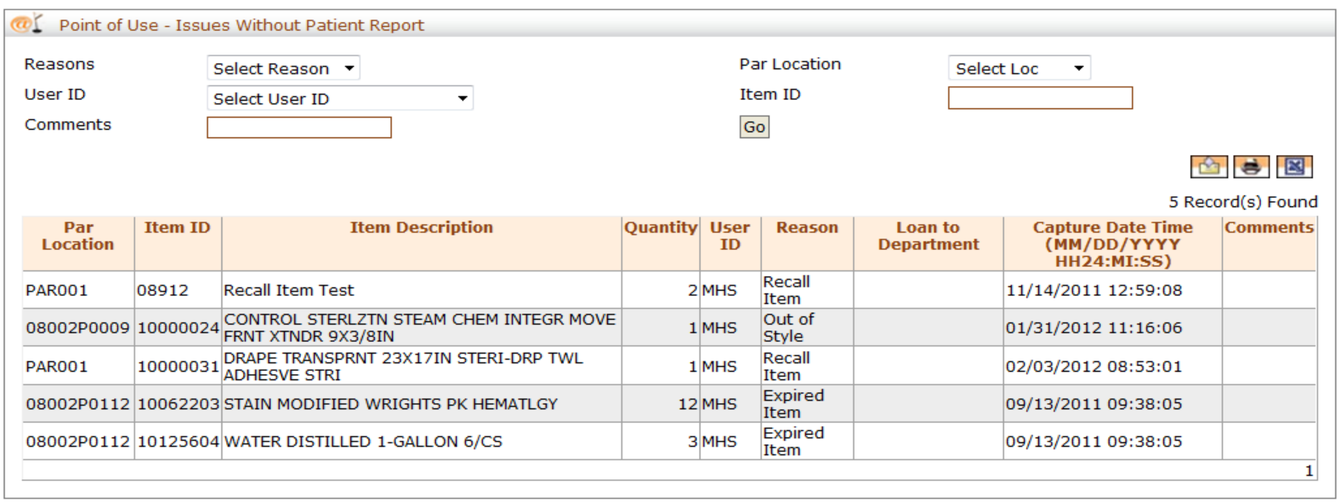


Figure 101

Select preferred parameters and ***click*** the Go button **Figure 102**



Par Location	Item ID	Item Description	Quantity	User ID	Reason	Loan to Department	Capture Date Time (MM/DD/YYYY HH24:MI:SS)	Comments
PAR001	08912	Recall Item Test	2	MHS	Recall Item		11/14/2011 12:59:08	
08002P0009	10000024	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	1	MHS	Out of Style		01/31/2012 11:16:06	
PAR001	10000031	DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	1	MHS	Recall Item		02/03/2012 08:53:01	
08002P0112	10062203	STAIN MODIFIED WRIGHTS PK HEMATLGY	12	MHS	Expired Item		09/13/2011 09:38:05	
08002P0112	10125604	WATER DISTILLED 1-GALLON 6/CS	3	MHS	Expired Item		09/13/2011 09:38:05	

1

Figure 102

Par Location – Cart ID/Par Location

Item ID – Item ID

Item Description – Item's description

Quantity – Number of items issued

Reason – Reason code for issuing item

Loan to Department – Department where item was issued from

Capture Date Time – DTTM when item was issued

Comments – Comments

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Expiration Tracking Report

The **Expiration Tracking Report** will help hospitals track the products that have expired and also the products that are going to expire in 'X' number of days.

The report will show the total value lost due to expired products by location so that departments can take appropriate steps to bring down the expirations.

Select the **Expiration Tracking Report** link **Figure 103**

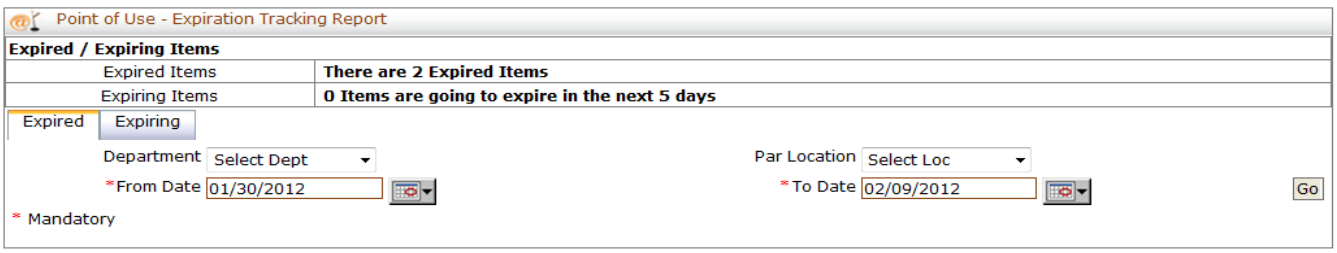
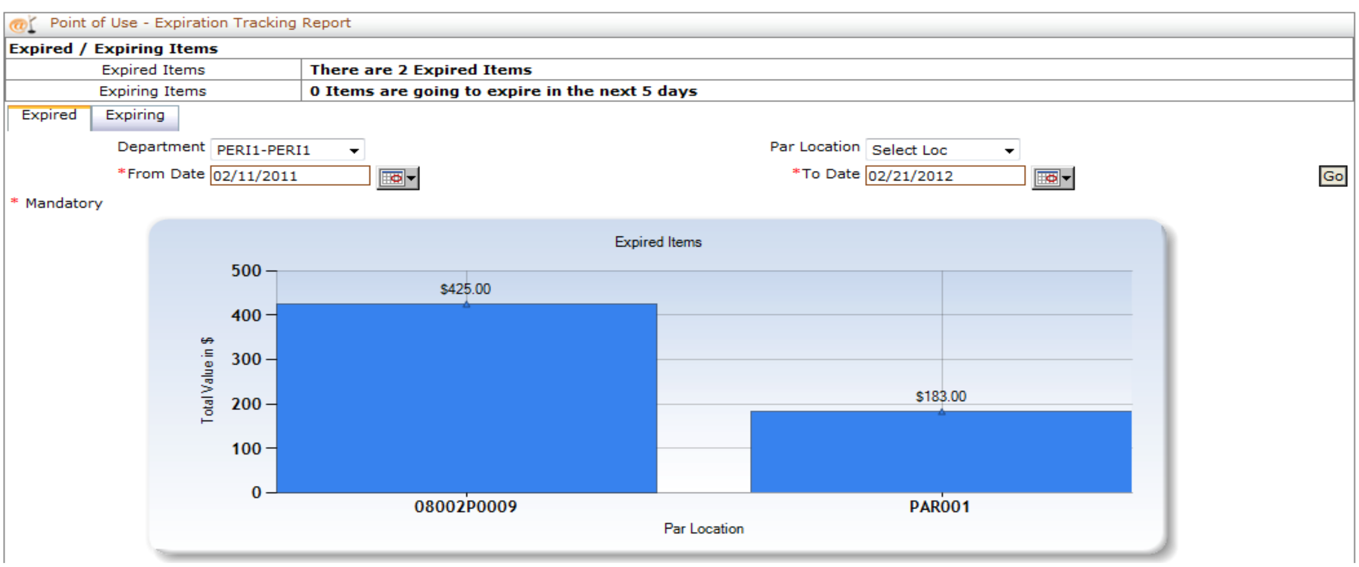


Figure 103

Select desired parameters, desired TAB (Expired or Expiring) and ***click*** the Go button **Figure 104**



2 Record(s) Found

Business Unit	Par Location	Item ID	Description	Lot#	Serial#	Bin Location	Date Of Expiry	Unit Cost ($)	Quantity On Hand	Total Cost ($)
08002	08002P0009	98765	Test Tube				05 Oct 2011	8.50	50	425.00
						Total Cost of Expired Items at Location 08002P0009				425.00
08002	PAR001	10000001975	TEST	18945890192	9987856748839	A02	15 Oct 2011	15.25	12	183.00
						Total Cost of Expired Items at Location PAR001				183.00
										1

Figure 104

Business Unit – Item business unit

Par Location – Cart ID/Par Location

Item ID – Item ID

Description – Item's description

Lot # – Expired/Expiring Item Lot #

Serial # – Item's serial number

Bin Location – Where item is stored/located

Date of Expiry – Date item expired

Unit Cost ($) – Item price

Quantity On Hand – Current QOH

Total Cost – Total cost of loss due to expiration of item

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Low Stock Report

The **Low Stock Report** will display items that are at low stock level for all items managed by @Par and the items that are identified as critical in @Par.

Select the **Low Stock Report** link **Figure 105**

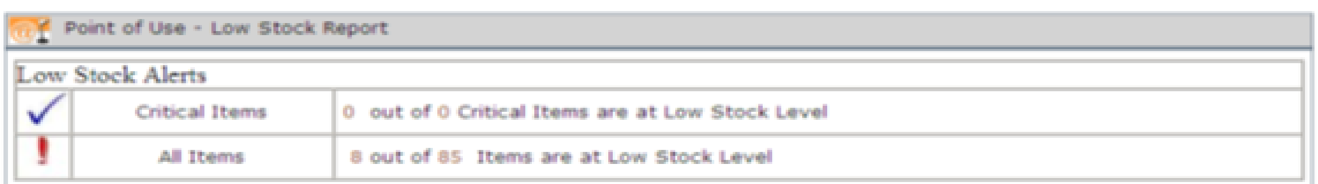

Figure 105

Click the highlighted number (in **Figure 105** above either 8 or 85) **Figure 106**

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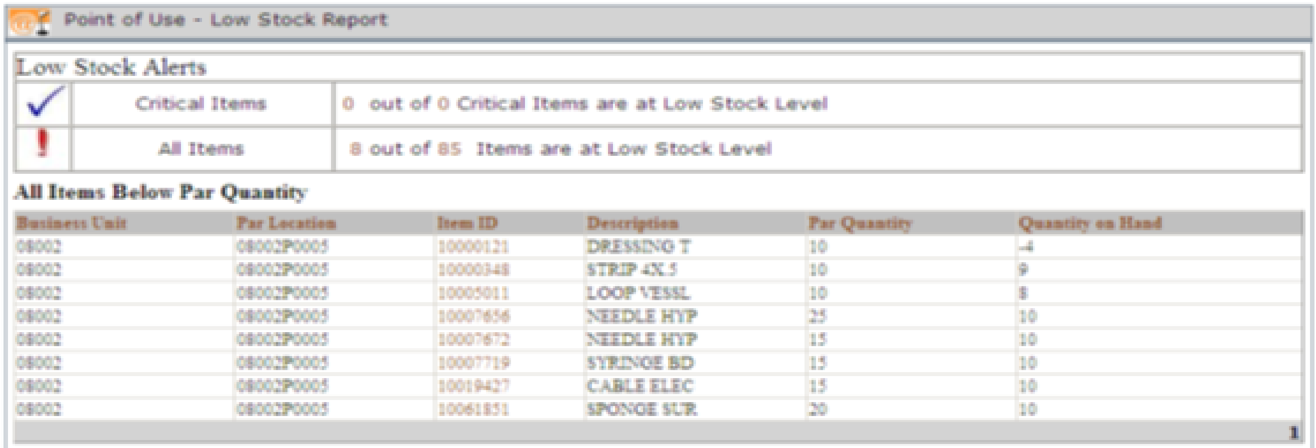

Point of Use - Low Stock Report

Low Stock Alerts

	Critical Items	0 out of 0 Critical Items are at Low Stock Level
	All Items	8 out of 85 Items are at Low Stock Level

All Items Below Par Quantity

Business Unit	Par Location	Item ID	Description	Par Quantity	Quantity on Hand
08002	08002P0005	10000121	DRESSING T	10	-4
08002	08002P0005	10000348	STRIP 4X.5	10	9
08002	08002P0005	10005011	LOOP VESSL	10	8
08002	08002P0005	10007656	NEEDLE HYP	25	10
08002	08002P0005	10007672	NEEDLE HYP	15	10
08002	08002P0005	10007719	SYRINGE BD	15	10
08002	08002P0005	10019427	CABLE ELEC	15	10
08002	08002P0005	10061851	SPONGE SUR	20	10

1

Figure 106

While reviewing, the manager can create an order for any item on the low stock report by **clicking** the **Item ID**.

Create orders are discussed later in this document.

Activity Report

The **Activity Report** will have three tabs:

1. Tab one will show Total Time, No. of Transactions, and Average Transaction time for Issues and Returns done by clinical Staff.
2. Tab two will show transaction times for supply chain staff for Issues, Returns, Cycle Counting, and Put Away.
3. Tab three will show transactions times for Case Picking and Returns.

Select the **Activity Report** link **Figure 107**

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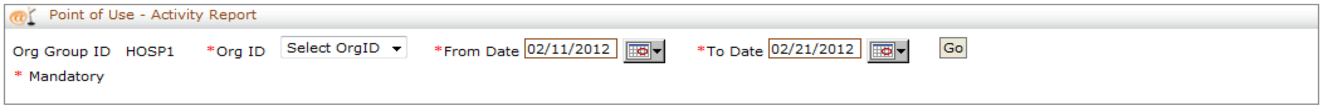

Point of Use - Activity Report

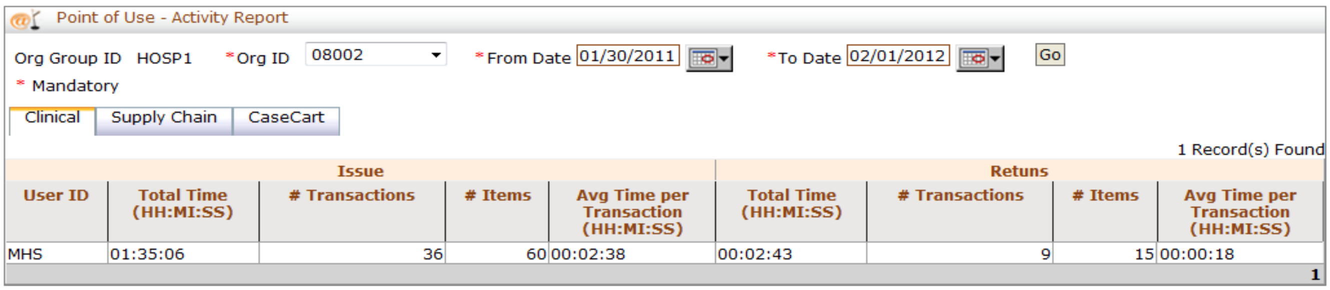
Org Group ID HOSP1 *Org ID Select OrgID *From Date 02/11/2012 *To Date 02/21/2012 Go

* Mandatory

Figure 107

Select the **Org ID** and date range then ***click*** the Go button **Figure 108**

Clinical Tab (Default tab)


Point of Use - Activity Report

Org Group ID HOSP1 *Org ID 08002 *From Date 01/30/2011 *To Date 02/01/2012 Go

* Mandatory

Clinical | Supply Chain | CaseCart

1 Record(s) Found

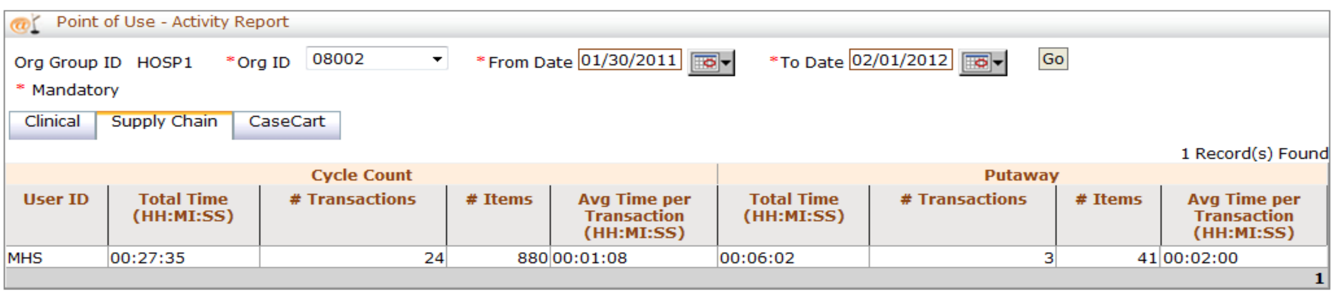
	Issue				Retuns			
User ID	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)
MHS	01:35:06	36	60	00:02:38	00:02:43	9	15	00:00:18

1

Figure 108

Click the Supply Chain tab **Figure 109**

Supply Chain tab


Point of Use - Activity Report

Org Group ID HOSP1 *Org ID 08002 *From Date 01/30/2011 *To Date 02/01/2012 Go

* Mandatory

Clinical | Supply Chain | CaseCart

1 Record(s) Found

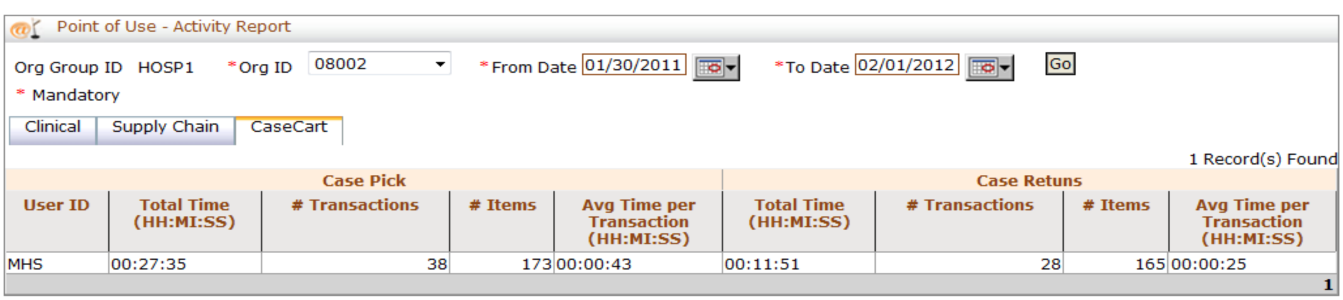
	Cycle Count				Putaway			
User ID	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)
MHS	00:27:35	24	880	00:01:08	00:06:02	3	41	00:02:00

1

Figure 109

Click the Case Cart tab **Figure 110**

Case Cart tab


Point of Use - Activity Report

Org Group ID HOSP1 *Org ID 08002 *From Date 01/30/2011 *To Date 02/01/2012 Go

* Mandatory

Clinical | Supply Chain | CaseCart

1 Record(s) Found

	Case Pick				Case Retuns			
User ID	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)	Total Time (HH:MI:SS)	# Transactions	# Items	Avg Time per Transaction (HH:MI:SS)
MHS	00:27:35	38	173	00:00:43	00:11:51	28	165	00:00:25

1

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Figure 110

Daily User Activity Report

The **Daily User Activity Report** will display the same information as the **Activity Report** only in more detail.

The report will allow supervisor a detail report for their staff on issue and return reporting. This will break out the report with 3 separate transaction types:

Clinical, Supply Chain or Case Cart

Select the **Daily User Activity Report** link **Figure 111**

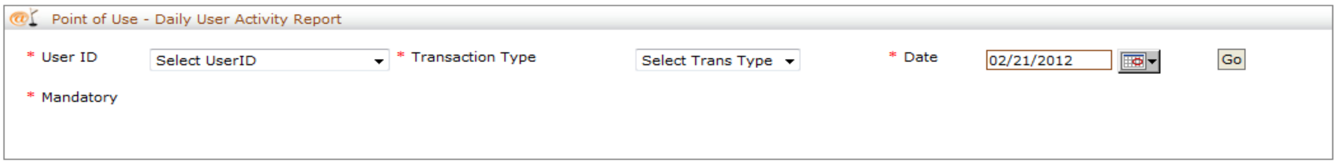
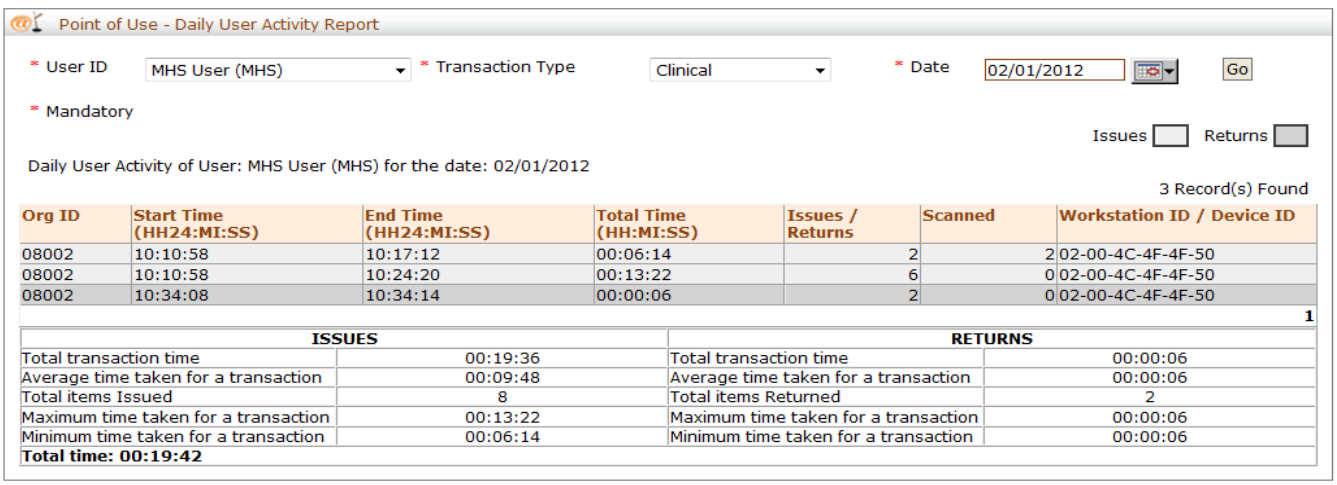


Figure 111

Select a user and Clinical transaction type and ***click*** the Go button **Figure 112**



Org ID	Start Time (HH24:MI:SS)	End Time (HH24:MI:SS)	Total Time (HH:MI:SS)	Issues / Returns	Scanned	Workstation ID / Device ID
08002	10:10:58	10:17:12	00:06:14	2	2	02-00-4C-4F-4F-50
08002	10:10:58	10:24:20	00:13:22	6	0	02-00-4C-4F-4F-50
08002	10:34:08	10:34:14	00:00:06	2	0	02-00-4C-4F-4F-50

1

ISSUES		RETURNS	
Total transaction time	00:19:36	Total transaction time	00:00:06
Average time taken for a transaction	00:09:48	Average time taken for a transaction	00:00:06
Total items Issued	8	Total items Returned	2
Maximum time taken for a transaction	00:13:22	Maximum time taken for a transaction	00:00:06
Minimum time taken for a transaction	00:06:14	Minimum time taken for a transaction	00:00:06

Total time: 00:19:42

Figure 112

This provides detail and summary data for all Clinical issues performed by a User. The report is a daily report so a date range is not available.

The data available will be the same for Clinical, Case Cart, or Supply Chain

Select a user and Supply Chain transaction type and ***click*** the Go button **Figure 113**

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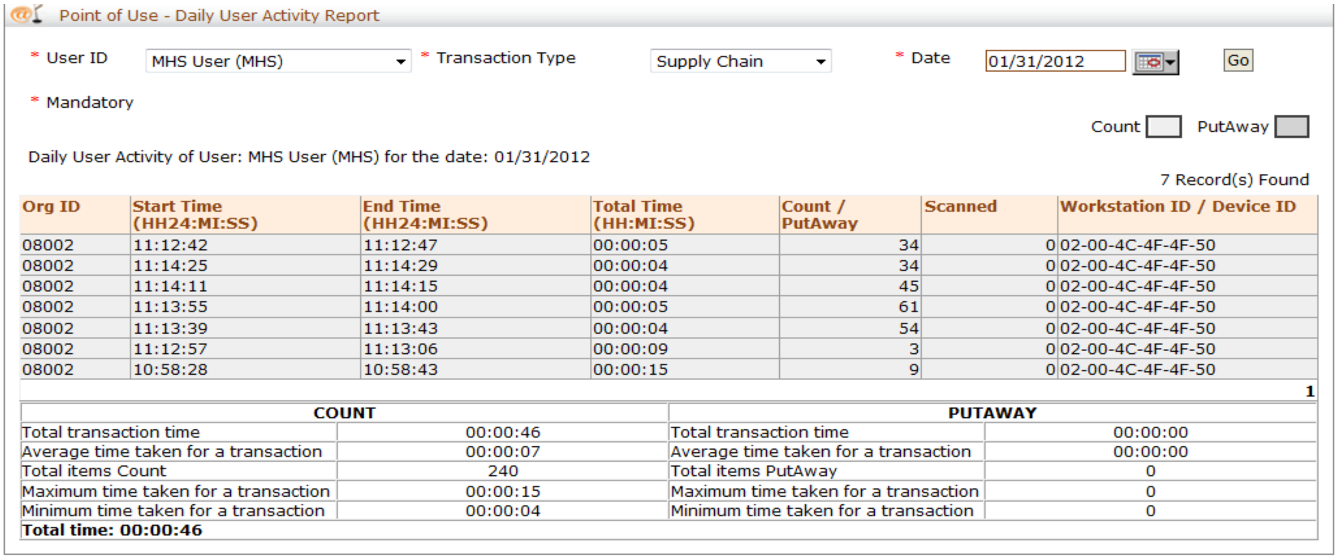


Point of Use - Daily User Activity Report

* User ID: MHS User (MHS) * Transaction Type: Supply Chain * Date: 01/31/2012 Go

* Mandatory

Count PutAway

Daily User Activity of User: MHS User (MHS) for the date: 01/31/2012

7 Record(s) Found

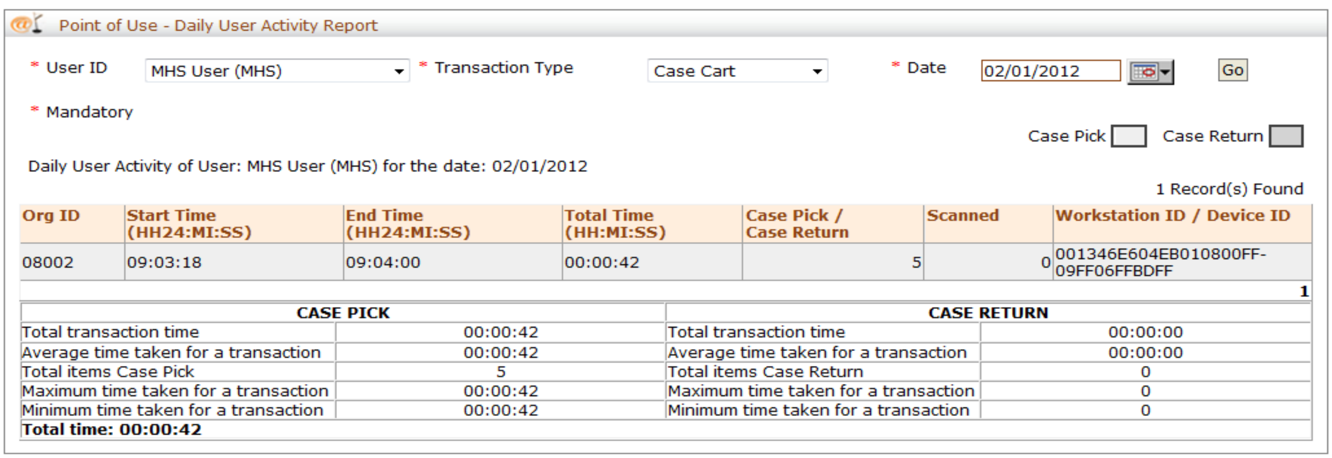
Org ID	Start Time (HH24:MI:SS)	End Time (HH24:MI:SS)	Total Time (HH:MI:SS)	Count / PutAway	Scanned	Workstation ID / Device ID
08002	11:12:42	11:12:47	00:00:05	34	0	02-00-4C-4F-4F-50
08002	11:14:25	11:14:29	00:00:04	34	0	02-00-4C-4F-4F-50
08002	11:14:11	11:14:15	00:00:04	45	0	02-00-4C-4F-4F-50
08002	11:13:55	11:14:00	00:00:05	61	0	02-00-4C-4F-4F-50
08002	11:13:39	11:13:43	00:00:04	54	0	02-00-4C-4F-4F-50
08002	11:12:57	11:13:06	00:00:09	3	0	02-00-4C-4F-4F-50
08002	10:58:28	10:58:43	00:00:15	9	0	02-00-4C-4F-4F-50

1

COUNT		PUTAWAY	
Total transaction time	00:00:46	Total transaction time	00:00:00
Average time taken for a transaction	00:00:07	Average time taken for a transaction	00:00:00
Total items Count	240	Total items PutAway	0
Maximum time taken for a transaction	00:00:15	Maximum time taken for a transaction	0
Minimum time taken for a transaction	00:00:04	Minimum time taken for a transaction	0
Total time: 00:00:46			

Figure 113

Select a user and Case Cart transaction type and ***click*** the Go button **Figure 114**



Point of Use - Daily User Activity Report

* User ID: MHS User (MHS) * Transaction Type: Case Cart * Date: 02/01/2012 Go

* Mandatory

Case Pick Case Return

Daily User Activity of User: MHS User (MHS) for the date: 02/01/2012

1 Record(s) Found

Org ID	Start Time (HH24:MI:SS)	End Time (HH24:MI:SS)	Total Time (HH:MI:SS)	Case Pick / Case Return	Scanned	Workstation ID / Device ID
08002	09:03:18	09:04:00	00:00:42	5	0	001346E604EB010800FF-09FF06FFBDFF

1

CASE PICK		CASE RETURN	
Total transaction time	00:00:42	Total transaction time	00:00:00
Average time taken for a transaction	00:00:42	Average time taken for a transaction	00:00:00
Total items Case Pick	5	Total items Case Return	0
Maximum time taken for a transaction	00:00:42	Maximum time taken for a transaction	0
Minimum time taken for a transaction	00:00:42	Minimum time taken for a transaction	0
Total time: 00:00:42			

Figure 114

501 Kings Hwy East Fairfield, CT 06825 Phone: (888) 647-4621 Fax: (888) 647-4621

Manage Consigned Item Order Report

The **Manage Consigned Item Order Report** can be utilized by both Vendors and Hospital Staff responsible for managing Bill Only Items. The report can be used to view Bill Only Item Utilization, approve usage, update Pricing, and submit for Order generation in MMIS.

Select the **Manage Consigned Item Order Report** link **Figure 115**

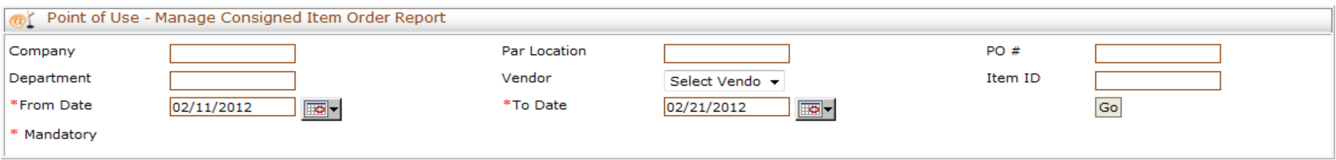
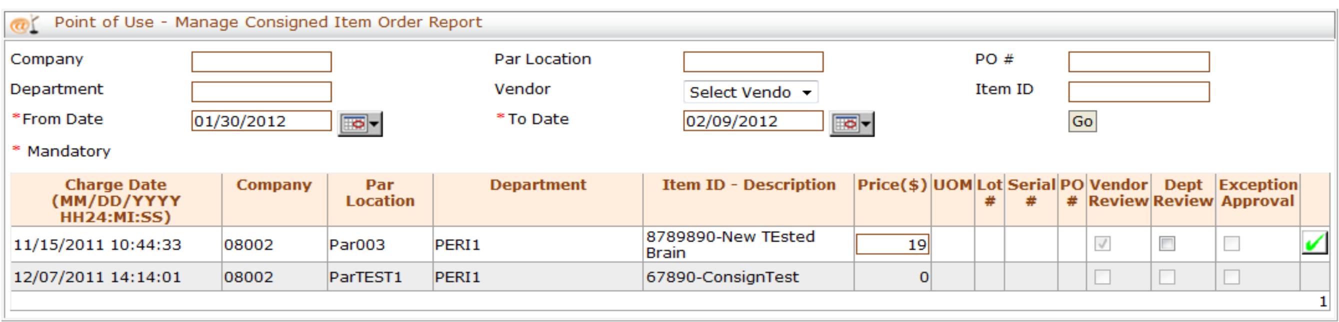


Figure 115

Select parameters and ***click*** the Go button **Figure 116**


Point of Use - Manage Consigned Item Order Report

Company | Par Location | PO #
Department | Vendor: Select Vendo | Item ID
*From Date: 01/30/2012 | *To Date: 02/09/2012 | Go
* Mandatory

Charge Date (MM/DD/YYYY HH24:MI:SS)	Company	Par Location	Department	Item ID - Description	Price($)	UOM	Lot #	Serial #	PO #	Vendor Review	Dept Review	Exception Approval	
11/15/2011 10:44:33	08002	Par003	PERI1	8789890-New TEsted Brain	19								
12/07/2011 14:14:01	08002	ParTEST1	PERI1	67890-ConsignTest	0								

1

Figure 116

Charge Date – Date and Time Item is charged

Company – Business Unit/Company

Par Location – Item's Par Locations

Dept – Department

Item ID-Description – Item's ID and description

Price – Item Cost

Lot # – Item Lot #

Serial # – Item's serial number

PO # – Purchase order number

Vendor Review – Checked done

Dept Review – Checked done

Exception Approval – Checked done

Based upon following **Org Group** parameters, the **Vendor Review, Dept Review, and Exception Approval** check boxes on the line items must be checked.

Exception Approval Required	☑	[Check this if Exception Approval required when Item is not under contract]
Vendor Review Required	☑	[Check this if Vendor needs to review information of Bill Only Items used prior to creating the Order]

Figure 117

PROCESSES

Create Orders

If your organization uses POU to create orders this can be used to manually review the inventory for a location and create orders based on the Quantity on hand. At that point instead of waiting for the replenishment to run at a specified time the order can be generated.

Select the **Create Orders** link **Figure 118**

Point of Use - Create Orders

* Business Unit/Company: Select BU
Item ID:
* Par Location: Select Loc
Go
* Mandatory

Figure 118

Enter a **Business Unit/Company** and **Par Location** to generate an order for. If you know the Item ID you can enter this here, or leave blank and ***click*** the Go button. **Figure 119**

Point of Use - Create Orders

* Business Unit/Company: 08002
Item ID:
* Par Location: 08002P0009
Go
* Mandatory

Submit

Item ID	Compartment	Description	Price($)	Item Type	Par Value	UOM	Order Type	Order Qty	Quantity On Hand
10000024	0-0-1	CONTROL STERLZTN STEAM CHEM INTEGR MOVE FRNT XTNDR 9X3/8IN	0.10	Stock	3	CA	Par	0	86
10000056	0-0-1	TAPE INDICATR COMPLY 60YDX.75IN STEAM LTX BEIGE	2.04	Stock	1	RL	Par	0	100
10000059	0-0-1	PACK TEST COMPLY BOWI DIC STEAM STERLZR LTX FREE DISP	3.23	Stock	2	EA	Par	0	93
10000081	0-0-1	INDICATOR STERLZTN GRVTY DISPLACMNT 50 CNTRL ATTEST TEST PK	2.00	Stock	2	EA	Par	0	98
10000083	0-0-1	INDICATOR STERLZTN 25 CNTRL ATTEST TEST PK STEAM RP RD OUT	154.37	Stock	2	BX	Par	0	98
10002971	0-0-1	LOCK STERLZTN CONTNR STEAM STERICONTRN SYS LTX FREE ORANGE	0.13	Stock	1000	EA	Par	907	93
10018794	0-0-1	TUBING 100FTX6IN PAPER HEAT SEAL DUAL INDICATR STERLZTN DISP	12.35	Stock	1	RL	Par	0	89
10018849	0-0-1	CLEANSER SKIN 2 PRESOAK ENZY CARE	35.36	Stock	1	GA	Par	0	100
10022087	0-0-1	SPONGE GAUZE CURITY 2X2IN 12 PLY BULK COTN NS LTX FREE DISP	0.01	Stock	800	EA	Par	700	100
10022103	0-0-1	SPONGE GAUZE CURITY 4X4IN 8 PLY BULK COTN NS LTX FREE DISP	0.02	Stock	400	EA	Par	300	100

1 2 3 4

Figure 119

Note: If the following Profile parameter is checked, user will have ability to modify the Order Qty from this screen.

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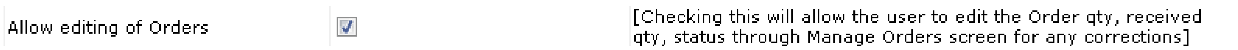


Supervisors may place an order now by ***clicking*** the Submit button. Once orders are submitted, they can be managed using the **Manage Orders** menu option.

Manage Orders

The **Manage Orders** option is used to review and manage orders that have been issued.

Click on the **Manager Orders** link and **Figure 120** appears

Figure 120

The following statuses are available: Open, Sent, Received, Cancel, Partially Received, Closed, and Error
OPEN = Pending Orders, Sent (items issued from HHT or POU Workstation), Received/Partially Received* (items putaway on Par Locations), Cancel (Order is Cancelled), Closed (items have been putaway)

Note: When using PUTAWAY functionality from POU the Received status may not be displayed if items on order are putaway full. This status may move straight to CLOSED. Partial Received status is triggered when Putaway quantity from PUTAWAY screen is not putaway full. For example, Ord Qty is 50 and actual items put away are 25.

1. Users can do PUTAWAY from POU client and if putaway in FULL it will update Manage Order status to CLOSED and Order will be removed from POU Putaway screen.
2. Users can do PUTAWAY from POU client and if quantity for item is partial it will update Manage Order Status to PARTIALLY RECEIVED and leave the Order available in POU Putaway screen.
3. Users can use MANAGE ORDER screen and if parameter is selected to Edit orders, they can use this to Receive Quantity in. IF they receive in FULL on MANAGE ORDERS screen, the Order will NOT be available in POU PUTAWAY.
4. Users can use MANAGE ORDER screen and if parameter is selected to Edit orders, they can use this to Receive Quantity in. IF they receive in Partial on MANAGE ORDERS screen, the Order will be available in POU PUTAWAY but ONLY if they select the PARTIALLY RECEIVED status. If they enter partial Recv Quantity and select RECEIVED status, it removes it from POU Putaway.

SO, essentially they are doing same functionality from Manage Orders and POU Workstation, just with two different WORDING conventions. They are receiving items in on the POU Workstation through Putaway.

Enter required search criteria, ***click*** the Go button **Figure 121**

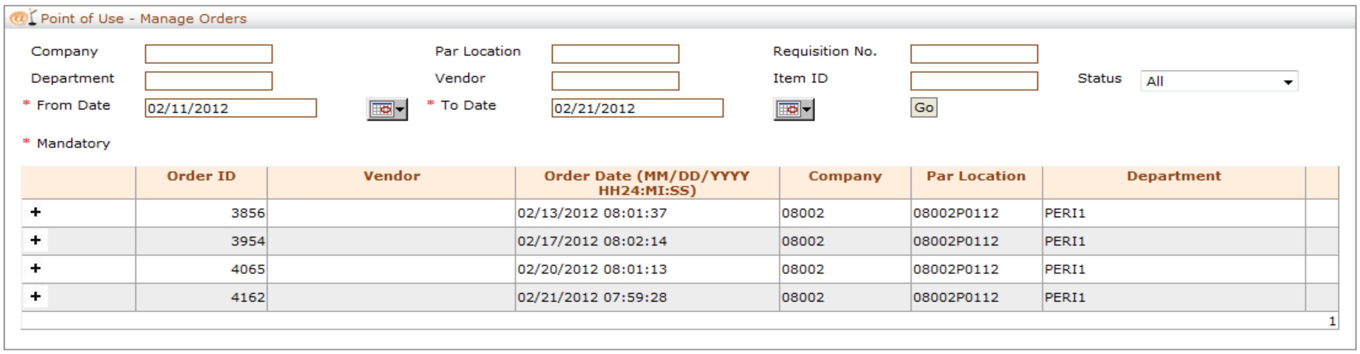


Figure 121

To review details of an order ***click*** the + button on the line to review **Figure 122**

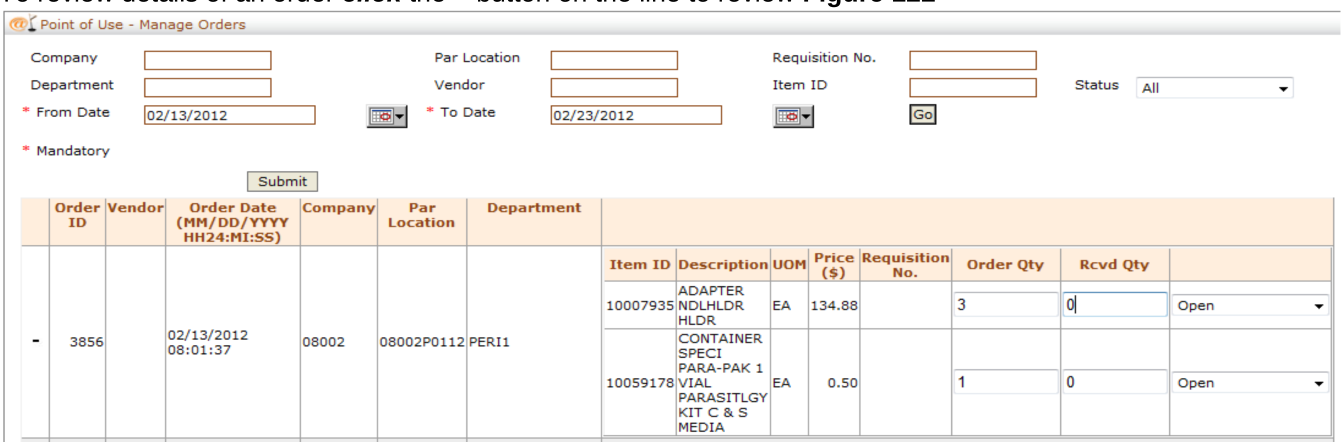
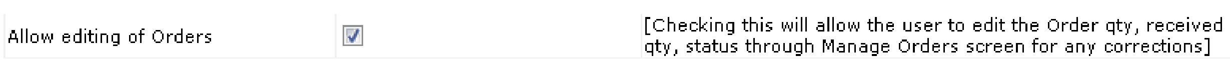


Figure 122

If the following Profile parameter is checked, the supervisor has the ability to edit Order Quantity, Received Quantity, and Status if required.



Critical Items

Critical items can be managed through an organization’s ERP system but if this is not available in other ERP systems they can be managed using this option in @Par.

Critical items are those items that should be counted each and every time a Par Location is counted.

Select the **Critical Items** option **Figure 123**

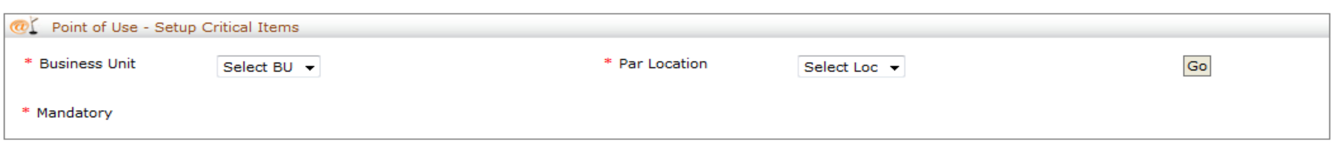


Figure 123

Enter required search criteria, ***click*** the 

button **Figure 124**

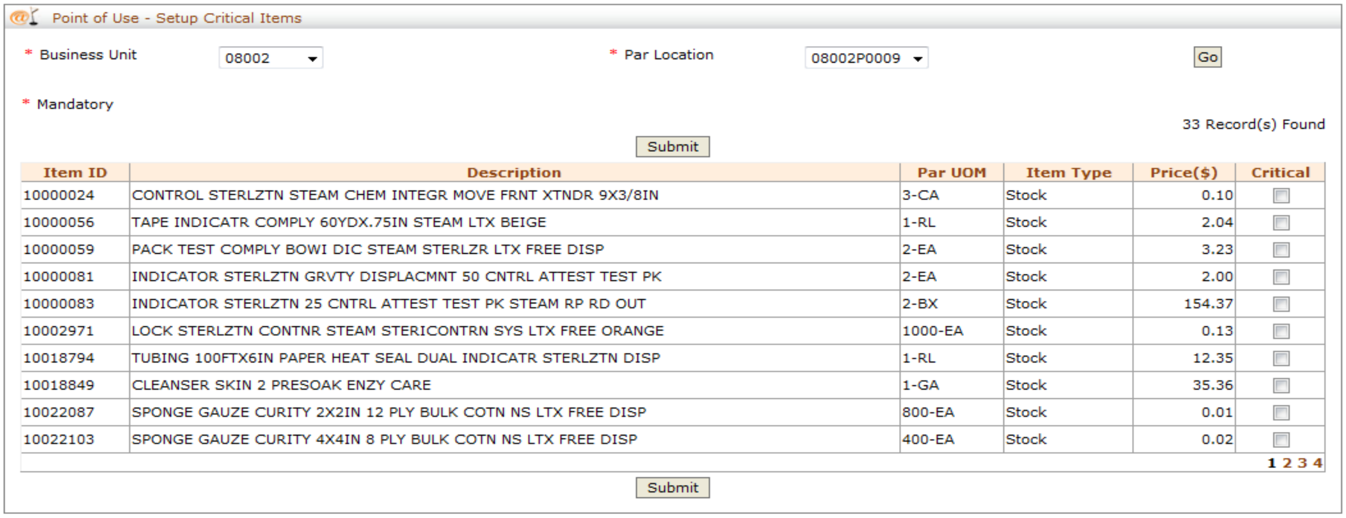


Figure 124

To select an item and "make it critical" ***click*** in the check box to the right of the item. Once the check box is checked, then ***click*** the Submit button to save.

When the Par Location is downloaded again, all items that were checked must have a value entered in the count before the Par Location can be sent and processed.

RECALL MANAGEMENT

At most hospitals Lot / Serial tracking can be ineffective because of the manual methods employed and different processes used by different departments. When hospitals receive recall notices there is no easy way to track those items and notify patients, remove them from inventory and record the steps taken to mitigate any risks.

MHS, Inc. has designed a comprehensive Recall Management Solution delivered through @Par Receive and @Par Point of Use (POU) modules to help hospitals manage recalls at the point of entry and point of use.

The monitoring solution built into the solution keeps track of Recall notices and notifies a designated user when a matching record is found.

FEATURES

- Comprehensive Alert Database
- Monitoring Service to track Recall Notices that matches customer specific Lot /Serial numbers in the inventory or utilized
- Alert to users when they either try to receive, issue, put away, or count items with Lot /Serial numbers that are on recall
- Record removal of recalled items to ensure Patient Safety and risk mitigation

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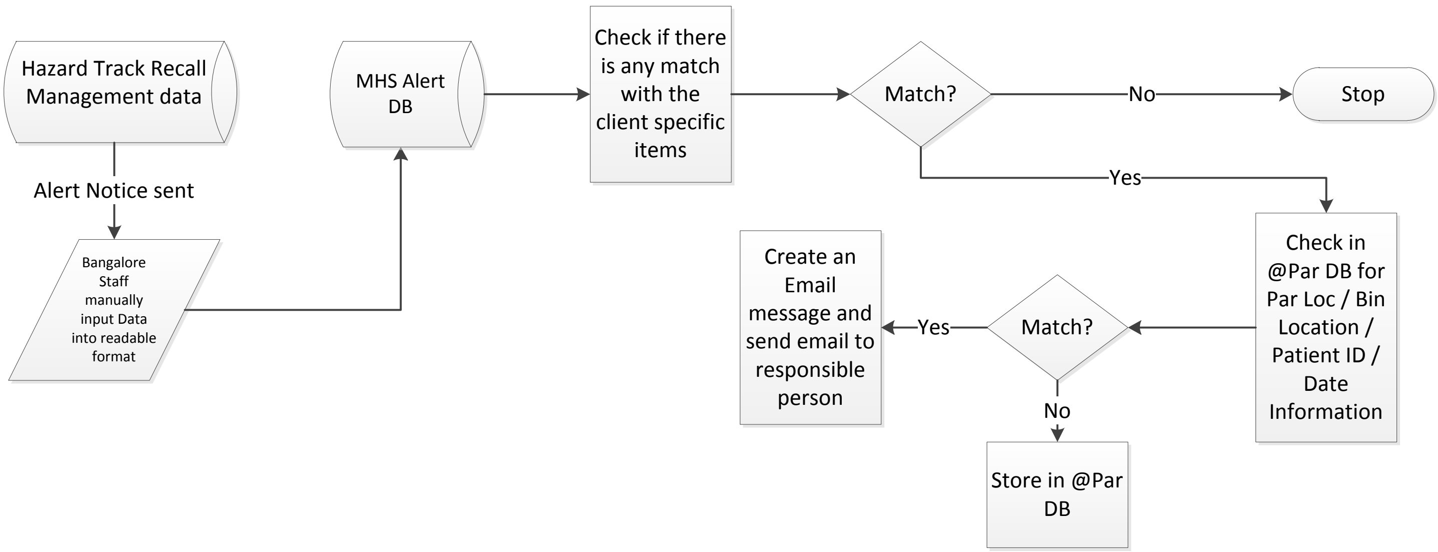

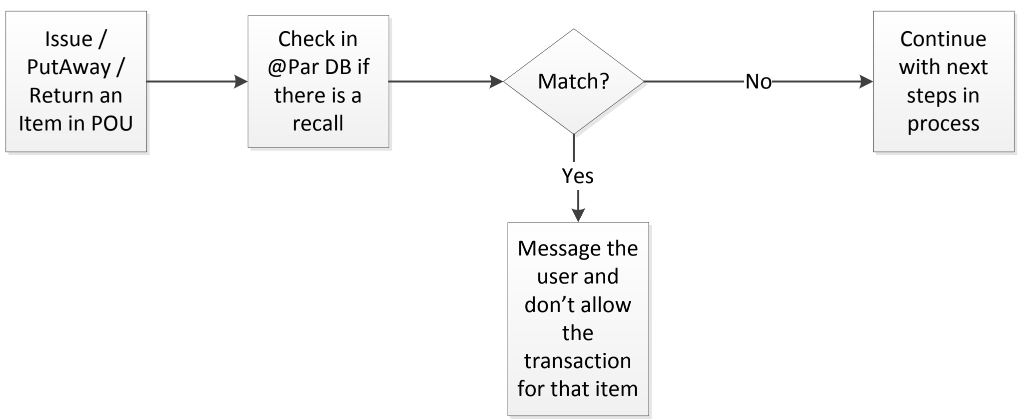

Figure 125

Recall Management Considerations

1. Windows Monitoring Service to monitor Alert DB
2. Windows Monitoring Service to send Item Master changes (POU Only) to Alert DB automatically
3. Configuration Parameters to identify Email Distribution List
4. Configuration Parameters to drive Alert DB Monitoring
5. Each client is given a unique Client ID
6. One time Item Load before beginning the service
   – Received from Customer Item Master for Receiving Module
   – Extracted from POU after initial Cycle Count
7. Alert notice message is received from Hazard Track
   – Information is received/available in Raw Data text format

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- Keyed in by staff manually in Bangalore
- Data elements include Lot # and Serial #

SETUP

New Service is added to AtPar/bin directory

Every new customer will require a license fill (**Inventory_Conf_Services.xml**) which has a unique Client ID (**CLIENT_ID**) assigned by Mark Pelletier's team. This number is to be incorporated into the XML file for the new service.


```
<?xml version="1.0" encoding="UTF-8" ?>
- <CONFIGFILE>
    <CLIENT_ID>8675309</CLIENT_ID>
  - <REF_DB>
    - <WEB_SERVICE>
        <MONIKER>http</MONIKER>
        <SERVER_IP>portal.mhsinc.com</SERVER_IP>
        <PORT />
        <USERNAME>XVG3oDwA2Cw=</USERNAME>
        <PASSWORD>Yb3RNiNrzB4=</PASSWORD>
      </WEB_SERVICE>
    </REF_DB>
  - <ALERT_DB>
    - <WEB_SERVICE>
        <MONIKER>http</MONIKER>
        <SERVER_IP>portal.mhsinc.com</SERVER_IP>
        <PORT />
        <USERNAME>XVG3oDwA2Cw=</USERNAME>
        <PASSWORD>Yb3RNiNrzB4=</PASSWORD>
      </WEB_SERVICE>
    </ALERT_DB>
  - <FTP_INFO>
      <SERVER_IP />
      <USERNAME />
      <PASSWORD />
      <PORT />
      <DEFAULT_DIR />
    </FTP_INFO>
</CONFIGFILE>
```


*MHS team may have to enter CLIENT_ID and SERVER_IP. The SERVER_IP is the server to search for Recalled Items

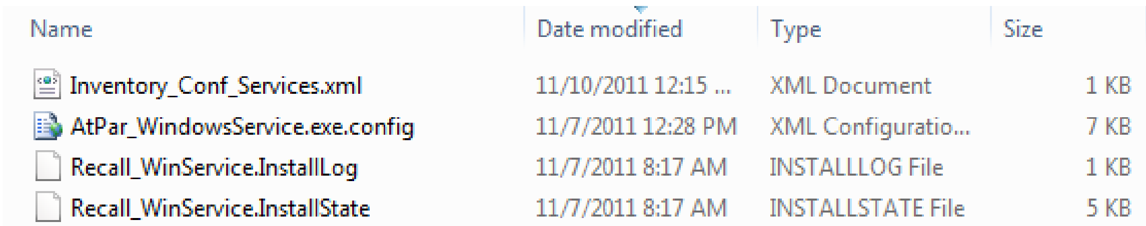


TABLE SETUP

ATPAR_MT.MT_ATPAR_JOB_SCHEDULES

Two services are required to be entered through the back end **– Figure 126**

1. **FTP**
2. **RECALL**

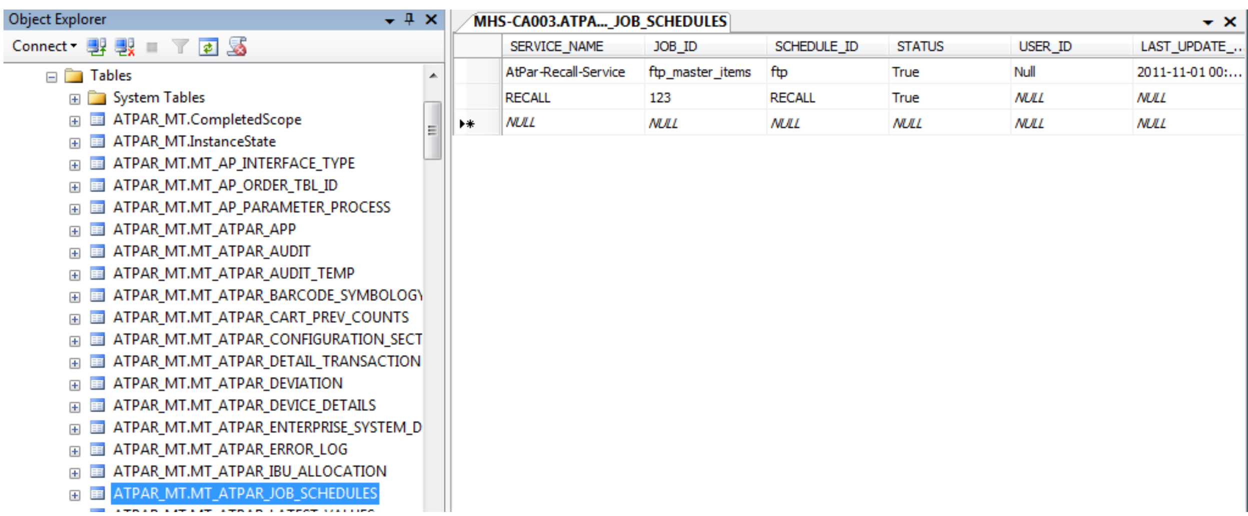


Figure 126

@Par Login → AtPar link → Configuration Manager → Process Scheduler – Figure 127

Figure 127

Click the Create button and screen **Figure 128** appears

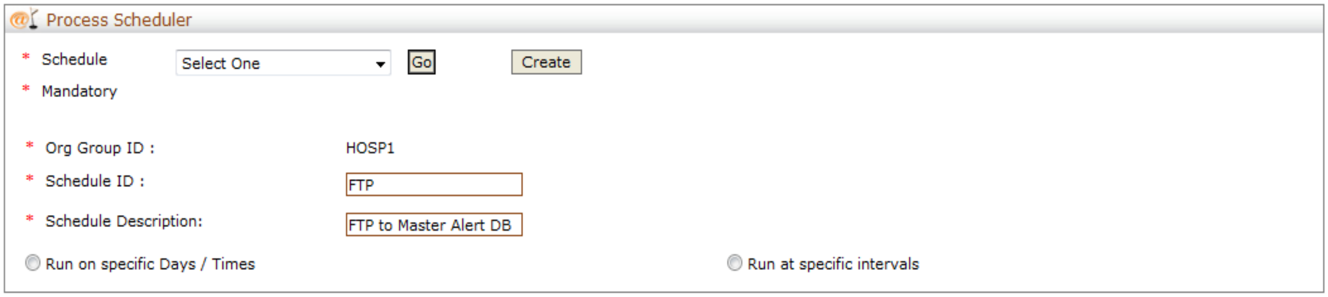


Figure 128

Create one Process Schedule = FTP and another Process Schedule = Recall

Frequency of the process will determine how often the MHS Master Alert DB is updated when a new Item is added in the POU system.

Setup by Day and Time **Figure 129**

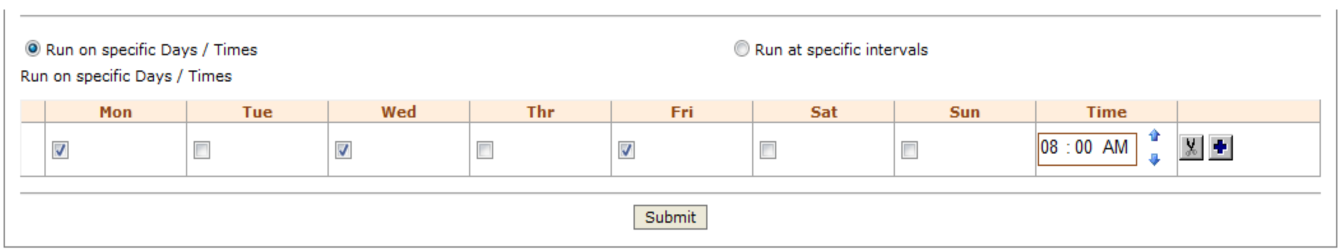


Figure 129

Or by Intervals **Figure 130**

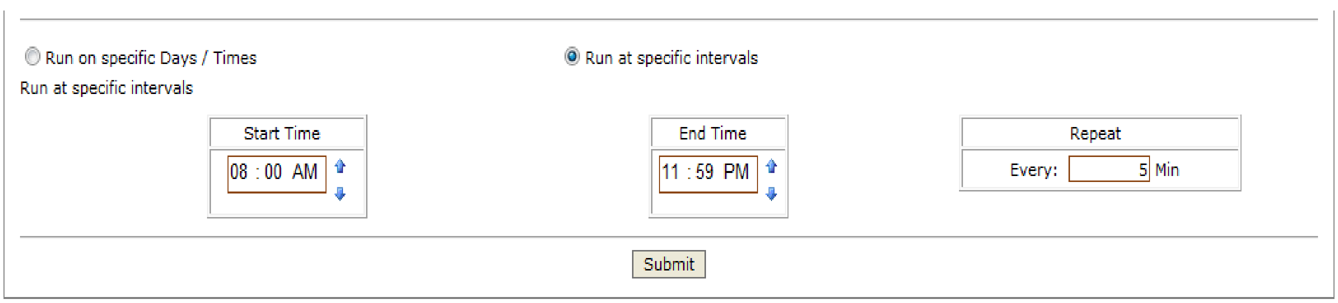


Figure 130

Recall Management Implemented configuration must now be enabled**.**

Use @Par Login → AtPar link → Configuration Manager → AtPar System Figure 131

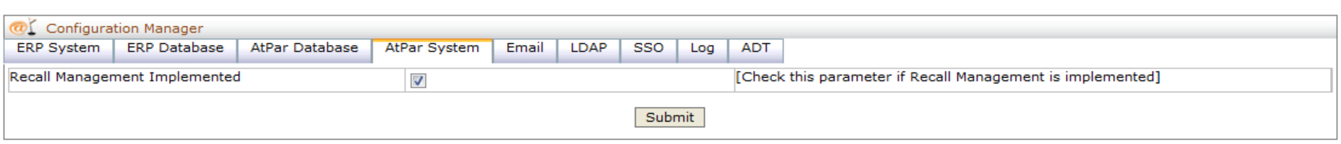


Figure 131

Parameter Name: **Recall Management Implemented**
Parameter Type: Check Box (Y/N), default is unchecked
Help Text: Check this parameter if Recall Management is implemented

- If this Parameter is checked the Windows Service will check the MHS Alert Database and also Local @Par DB for recalls.
- If this Parameter is checked the Windows Service will create a file for changes (Additions, Deletions) in Item Master
- If this Parameter is checked Email for Recall Notification parameter should be mandatory

Message: "Email for Recall Notification is Mandatory when Recall Management is implemented"

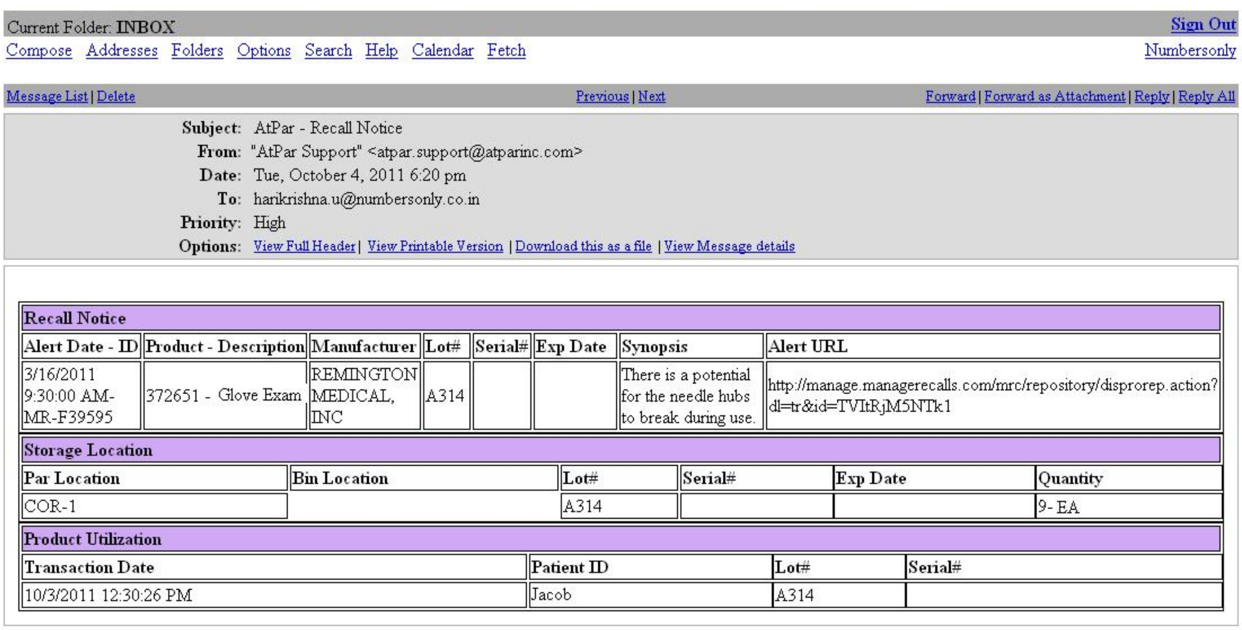
Org Group Parameters:

@Par POU Product Org Group Parameter:

Parameter Name: **Email for Recall Notification**
Parameter Type: Text Box, default blank
Help Text: Recall notification will be sent to the provided email address

Email for Recall Notification	rhatt@mhsinc.com	[Notification will be sent to the provided email address]

When Recall Notification in POU is generated the following screen will be sent **Figure 132**



Current Folder: INBOX | Sign Out
Compose Addresses Folders Options Search Help Calendar Fetch | Numbersonly
Message List | Delete | Previous | Next | Forward | Forward as Attachment | Reply | Reply All

Subject: AtPar - Recall Notice
From: "AtPar Support" <atpar.support@atparinc.com>
Date: Tue, October 4, 2011 6:20 pm
To: harikrishna.u@numbersonly.co.in
Priority: High
Options: View Full Header | View Printable Version | Download this as a file | View Message details

Recall Notice							
Alert Date - ID	Product - Description	Manufacturer	Lot#	Serial#	Exp Date	Synopsis	Alert URL
3/16/2011 9:30:00 AM-MR-F39595	372651 - Glove Exam	REMINGTON MEDICAL, INC	A314			There is a potential for the needle hubs to break during use.	http://manage.managerecalls.com/mrc/repository/disprorep.action?dl=tr&id=TVItRjM5NTk1

Storage Location					
Par Location	Bin Location	Lot#	Serial#	Exp Date	Quantity
COR-1		A314			9- EA

Product Utilization			
Transaction Date	Patient ID	Lot#	Serial#
10/3/2011 12:30:26 PM	Jacob	A314	

Figure 132

Setup Department Screen for Recall:

Setup Department Screen should be modified to bring Email for Recall Notification Parameter to Department Level; this will be defaulted from the Org Group Parameter and if changed here will override the Org Group Parameter.

@Par Login → Point of Use link → Setup Departments

Email for Recall Notification	rhatt@mhsinc.com	[Use the format username@domainname.com]

Parameter Name: **Email for Recall Notification**
Parameter Type: Text Box, default blank
Help Text: Recall notification will be sent to the provided email address

Bill Only

There are occasions when Bill only items are received without processes in place to enter the item first into the database. An example is a Vendor bringing in a new Knee Replacement that a physician decides to try in a procedure that day. This is known as a Bill only item.

@Par POU manages this process very efficiently.

KEY BENEFITS

- Avoid manual proces of documenting arrival, usage and billing of bill-only items
- Complete automation of bill-only process
- Capture usage and charge for high value items such as implants, spinal instrumentation and specialty cardiology products that do not fall into regular categories
- Item recalls can be handled in an easy, automated and efficient manner
- Track and automate hospital implant log through automatic data capture and mapping implants to patient logs

KEY FEATURES

- Pre-approval process for bill-only items prior to procedures

- Point of use capture for bill-only items
- Lot / Serial capture and recall management
- PO creation workflow post procedure
- Interface to MMIS
- Interface to Contract Management for pricing / Contract Price Load
- Comprehensive reference database to capture item attributes at point of use
- Billing interface for charge capture of bill only items
- Web based vendor view

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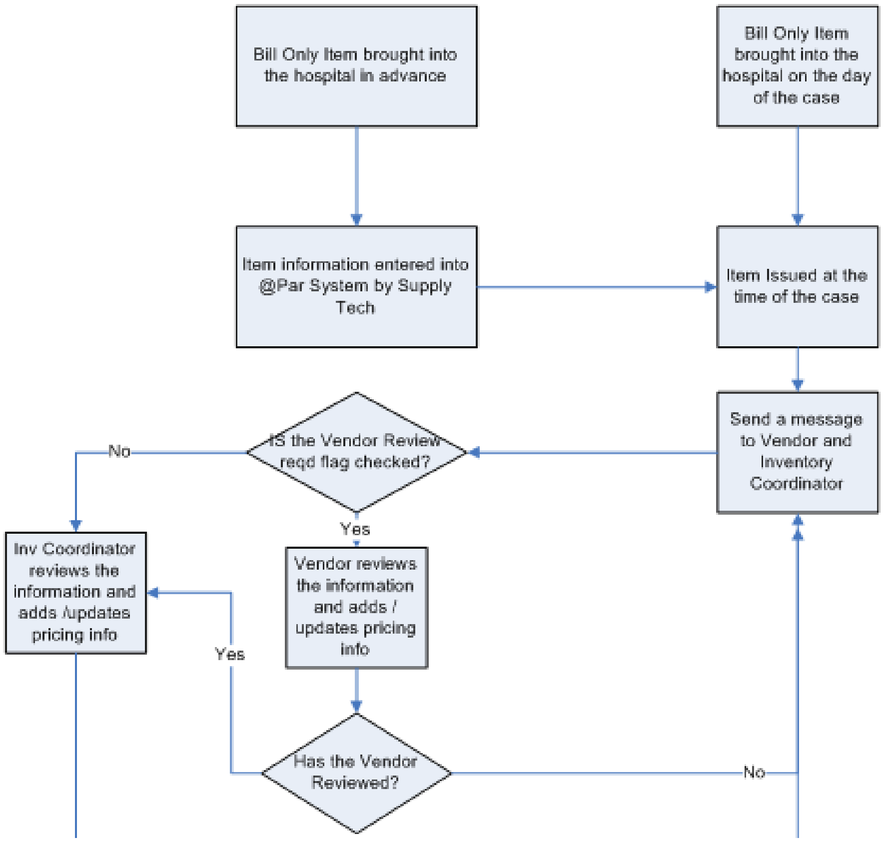

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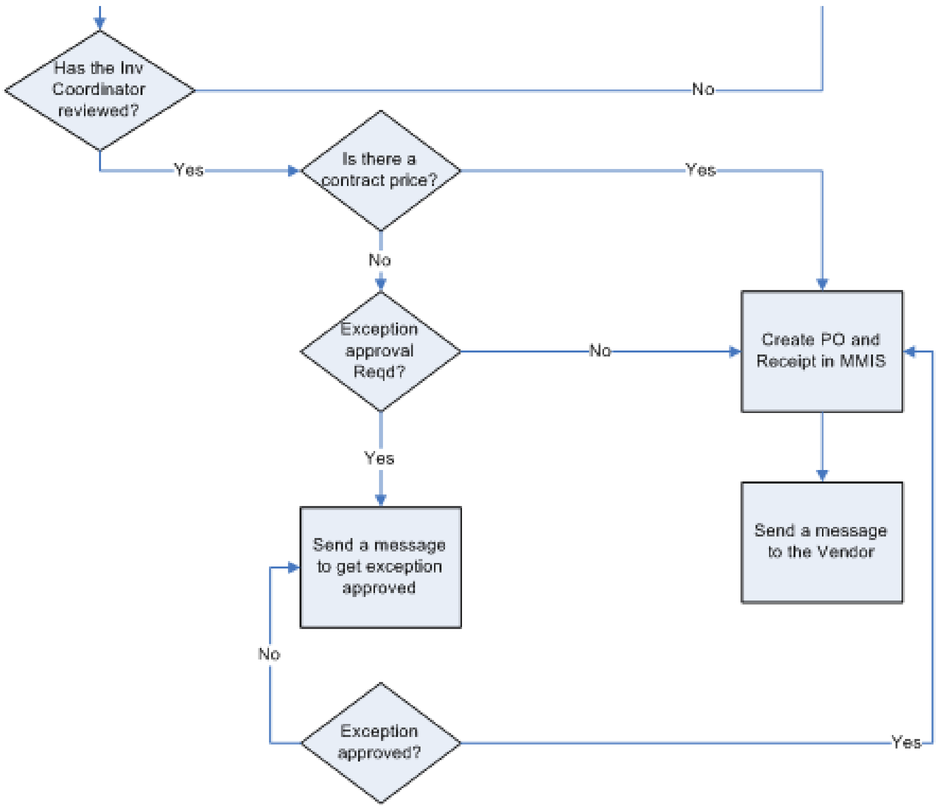


The entire entry of a Bill Only item process will be covered in the POU HHT Guide.   When an item is added on the @Par POU client there are steps on the web pages that are required.

Note: Per the process on the client when adding a Bill Only item, staff must assign the item to a Par Location.

Select the **Manage Non Cart Items** link **Figure 133**

Point of Use - Maintain Non Cart Items

Business Unit	Par Location	Dept	
08002	08002P0009	PERI1	Add Item
08002	08002P0011	PERI1	Add Item
08002	08002P0111	PERI1	Add Item
08002	08002P0112	PERI1	Add Item
08002	PAR001	PERI1	Add Item
08002	Par003	PERI1	Add Item
08002	ParTEST1	PERI1	Add Item

Figure 133

Click on the Par Location that an item was just added to and it should appear. **Figure 134**

Point of Use - Non Cart Items

Item ID [ ] Item ID - Description [ ] Go

Add Item | Go Back

	Item ID	Item ID - Description	Par Location	Business Unit
Adjust Item Quantity	04005808803095	Nivea Body Lotion	PAR001	08002
Adjust Item Quantity	1000000000005	What it is	PAR001	08002
Adjust Item Quantity	10000001975	TEST	PAR001	08002
Adjust Item Quantity	100000098765	NewTest	PAR001	08002
Adjust Item Quantity	10000031	DRAPE TRANSPRNT 23X17IN STERI-DRP TWL ADHESVE STRI	PAR001	08002
Adjust Item Quantity	10000087	TAPE DRSG BLNDRM 5YDX1IN ADHERNT HYPOALL WTRPROF L	PAR001	08002
Adjust Item Quantity	1000334	New Item	PAR001	08002
Adjust Item Quantity	188888	Knee Replacement	PAR001	08002

Figure 134

Click the Item **Figure 135**

Point of Use - Edit Items

Save | Go Back

Business Unit	08002
Par Location	PAR001
Item ID	04005808803095 *
Item Description	Nivea Body Lotion *
Manufacturer	
Manufacturer Item ID	
Vendor	
Custom Item ID	
Vendor Item ID	
Count Order	
Optimum Quantity	1
UOM	EA *
UPC ID	
Sample	☐
Patient Chargeable	☐
Item Price	18.75
Charge Code	100
Lot Controlled	☐
Serialized	☐
Compartment	B369
Status	◉ Active ○ InActive ○ Pending

Save | Go Back

* Mandatory

Figure 135

Enter all mandatory (*) information and also any other pertinent information that is required for issuing and charging.

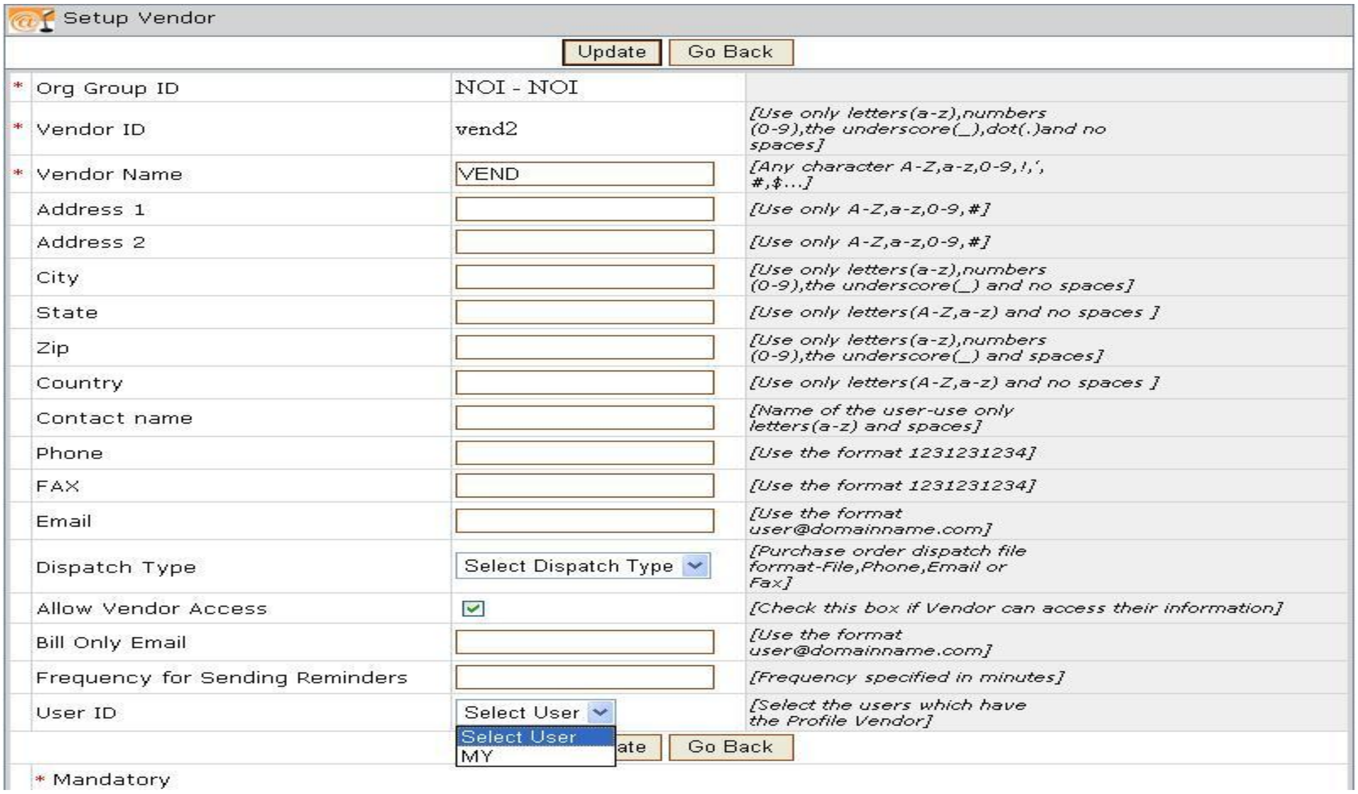
Default is PENDING on any new item.

Click on the ACTIVE button to retain information in active status so item can be used from this point moving forward.

Click the Save button to save or Go Back button to return to previous screen without saving changes.

Make sure a Department is ready and set up as previously discussed in this document.

Set up VENDOR must be done also. ***Select*** the **Setup Vendor** link **Figure136**



Setup Vendor

Update | Go Back

*	Org Group ID	NOI - NOI	
*	Vendor ID	vend2	[Use only letters(a-z),numbers (0-9),the underscore(_),dot(.)and no spaces]
*	Vendor Name	VEND	[Any character A-Z,a-z,0-9,!,', #,$...]
	Address 1		[Use only A-Z,a-z,0-9,#]
	Address 2		[Use only A-Z,a-z,0-9,#]
	City		[Use only letters(a-z),numbers (0-9),the underscore(_) and no spaces]
	State		[Use only letters(A-Z,a-z) and no spaces]
	Zip		[Use only letters(a-z),numbers (0-9),the underscore(_) and spaces]
	Country		[Use only letters(A-Z,a-z) and no spaces]
	Contact name		[Name of the user-use only letters(a-z) and spaces]
	Phone		[Use the format 1231231234]
	FAX		[Use the format 1231231234]
	Email		[Use the format user@domainname.com]
	Dispatch Type	Select Dispatch Type	[Purchase order dispatch file format-File,Phone,Email or Fax]
	Allow Vendor Access	☑	[Check this box if Vendor can access their information]
	Bill Only Email		[Use the format user@domainname.com]
	Frequency for Sending Reminders		[Frequency specified in minutes]
	User ID	Select User (Select User, MY)	[Select the users which have the Profile Vendor]

Update | Go Back

* Mandatory

Figure 136

Both the Quantity on Hand Report and the Managed Consigned Item Report should display the newly added item.