medserve®

CAREDirect medserve

1 — Last update: Jan 29, 2023

CAREDirect

Table of Contents

1. Getting Started

The following section includes some basic steps on getting started with the CAREDirect medserve cabinet. When following these directions, it is recommended that the steps are completed in the order in which they are presented. Additionally, many steps are linked to other sections in the manual if more detail is needed for specific actions.

Installation

Please refer to the Installation Instructions manual for installation instructions and warnings. The Installation Instructions are included with the cabinet and can also be accessed online (see Other Manuals).

Setting up the Cloud

The following steps outline the procedure for setting up the cloud account on the CAREDirect website:

1. Be sure that a temporary password has been provided for access to the cloud portal. If not, contact CAREDirect
2. Using the associated email and temporary password sent to that email, login on the CAREDirect Portal and set a permanent password (see Accessing the Cloud for the first time)
3. Configure the facility drugs that will be added to the cabinet (see Facility Drug Maintenance)

Setting the Cabinet up

The following steps outline the procedure when accessing the cabinet for the first time:

1. Login Using the **Factory Admin** code (10597) (see Accessing the Cabinet for the first time)
2. Establish a network connection for the cabinet (see Network Settings)
3. Update the cabinet to the latest firmware (see Firmware Update)
4. Register the cabinet with the cloud using the email and password set in **Setting up the Cloud** above. (see Cloud Settings)
5. Create a new Administrator account (see Adding New Users)
6. Configure the Bins in the cabinet with the desired medications and supplies (see Bin Configuration)

> ✳ By default, the cabinet will sync information with the cloud every **10 minutes** so these changes may not appear immediately. (see **Other Functions** within Cloud Settings)

> ❗ Once these steps have been completed and it has been verified that another Admin account can successfully login to the system, the **Factory Admin** account can be disabled.

✳ Other Helpful Links
Cloud: Hierarchy of the Cloud, Main Dashboard
Cabinet: Main User Screen, Device Settings, Unlocking Bins with Medications

2. Using the Cabinet

The following section highlights some basics about using the cabinet.

2.1. Accessing the Cabinet for the first time

Every device comes programmed with one user account.

1. Create a new administrator account (See Adding New Users)
2. Logout by pressing the lock icon
3. Log into the new Administrator account that was just created
4. Disable the Factory Admin user account (See Managing Current Users)

2.2. Login Screen

Logging into the System

The login screen appears when no user is logged in. If the login screen is displayed, the cabinet and all of the bins are locked. To login, either enter a valid PIN code and press the unlock icon or scan a valid badge with the RFID reader.
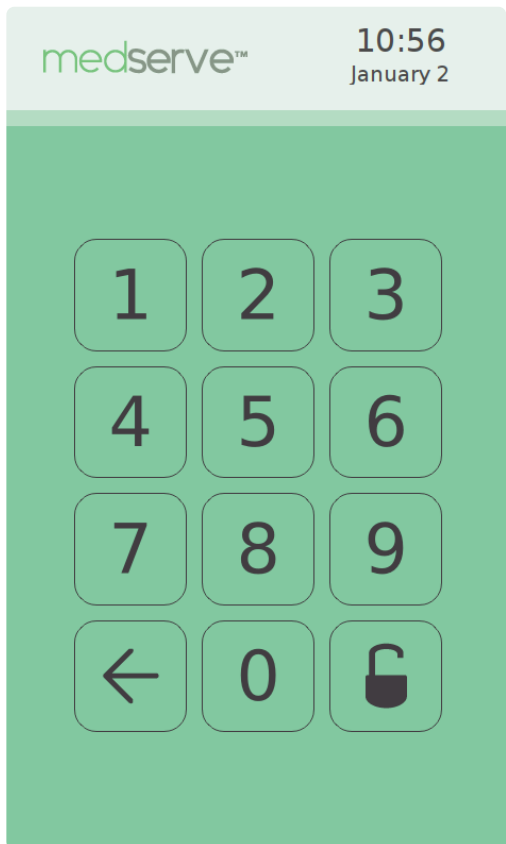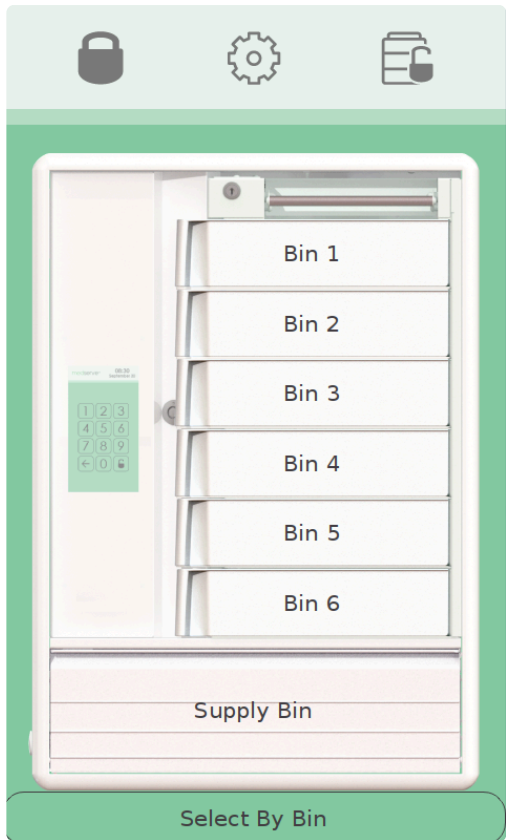

After **4** failed login attempts, the system will display "Logins blocked" and prevent any additional login attempts for 10 minutes unless an administrator account successfully logs in before that.

2.3. Main User Screen

Accessing the Main User Screen

After successfully logging in, an image of the cabinet will be shown on the screen.

To access the bins, see Accessing the Bins

Other Features

In addition to accessing the bins, there are a number of other features that can be accessed from this screen:

- Press the settings icon to access the settings menu (see Settings Menu).
- Press the unlock cassette icon to remove the cassette (see Removing the Cassette).
- Press the lock icon to lock all bins (including the supply bin and sidekick) and logout (see Locking the Cabinet).

2.4. Accessing the Bins

Opening the bins

To open a bin, first press the desired bin icon to unlock the bin. The bin icon will turn green, indicating that it has been unlocked.
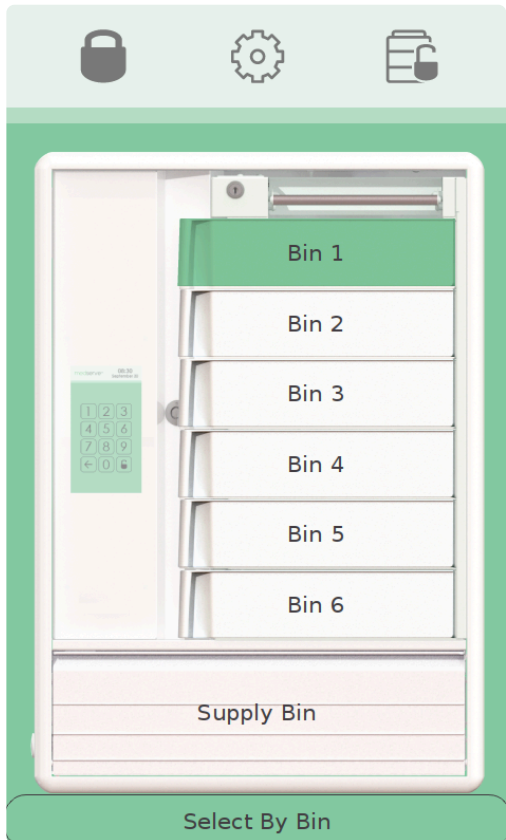
To remove the bin, grab the bin handle and pivot the bin out. The bin handle is designed to be held by either the right or left hand.

Depending on the configuration of the settings, the supply bin may automatically unlock when one of the six bins is unlocked (see Device Settings).

If the supply bin does not automatically unlock, it can be unlocked by pressing the "Supply Bin" icon. To open the supply bin, grab the handle at the top of the door and pull down. Once opened, the supply bin door acts as a shelf for preparing medications. The bins are designed to fit securely on the supply door when opened.

Closing/Reinserting the Bins

To close a bin, reinsert the right side of the bin behind the flange in the cassette. Pivot the bin into the closed position. To close the supply bin, rotate it upward into its closed position.

Other notes

- Multiple bins can be unlocked/opened at once by pressing multiple bin icons.
- Bins and the supply door may be reinserted/closed even after the cabinet is locked.
- When a bin is unlocked, the **Remove Cassette** icon is disabled (see Removing the Cassette).
- As an accessory, Grey bins can be purchased for use. These bins are the same size and fit into the system in the same way. However, these bins are deemed "Controlled Substance Bins" and have a double-locking feature equipped. The second lock is a mechanical lock and requires a key (see Controlled Substance Bins).
- When a Bin is stocked with a medication (see Bin Configuration), there is an extra step to complete before unlocking the bin (see Dispensing Medications).
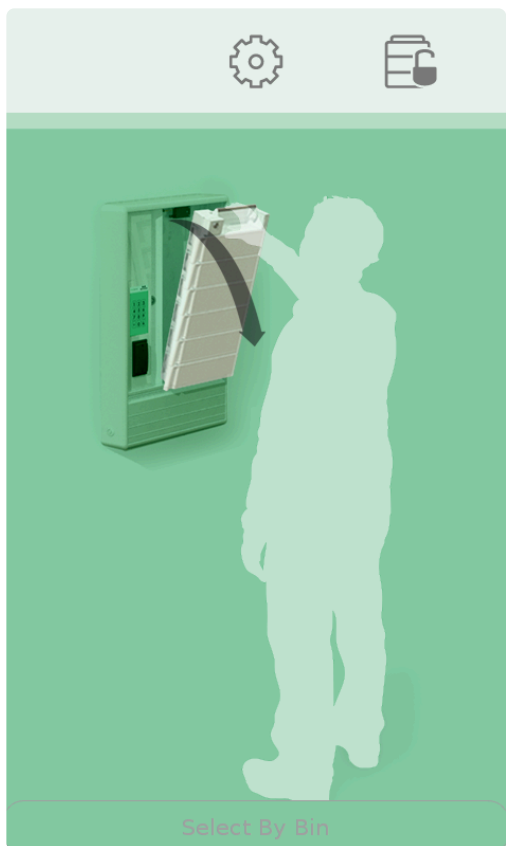
2.5. Removing the Cassette

Unlocking the Cassette

From the Main User Screen, press the unlock cassette icon and wait for the cassette to unlock.

A screen will appear indicating that the cassette is unlocked and showing how to remove it.

Removing the Cassette

Remove the cassette from the cabinet by pulling on the handle and rotating the cassette forward and out.

Reinserting the cassette

To reinsert the cassette, place the feet of the cassette in the associated holes on the cabinet and then pivot the top of the cassette into the cabinet.

Other Notes

- The cassette may be inserted into the cabinet after the cabinet has been re-locked.
- If a cassette is inserted while a cabinet is unlocked, be sure to press the lock icon to ensure all bins are locked before leaving the cabinet

2.6. Locking the Cabinet

Locking the Cabinet

The lock feature in the software will lock all bins, including the supply bin, cassette and sidekick (if used). It will also log the current user out of the system.

To lock the cabinet, press the lock icon from any screen that includes the icon header.

The system will display the login screen after the user has been logged out

Other Notes

- It is recommended that a user always locks the system before leaving the cabinet to prevent an unauthorized user from accessing the cabinet.
- The cabinet has a feature equipped where it will timeout after a set period of time. After this set period of inactivity, the cabinet will automatically lock all of the bins and require the user to login again in order to access the bins (see Device Settings).
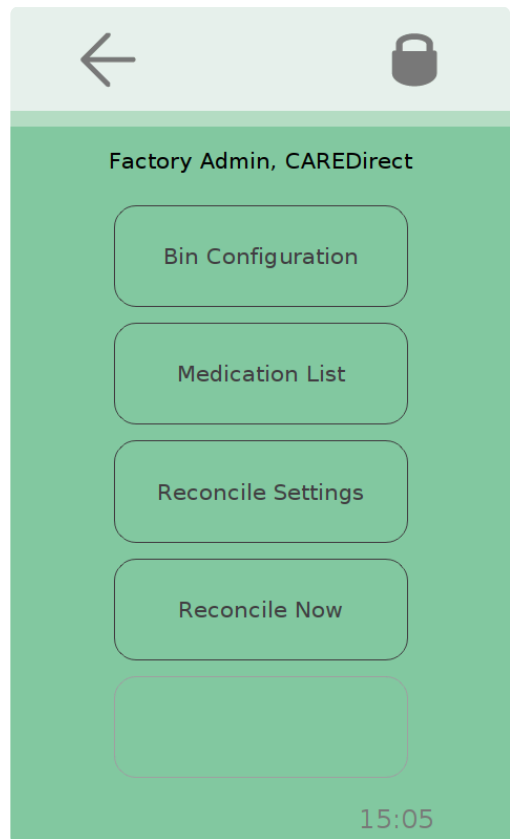
3. Medications

The first option within the settings menu is Medications. This option can be accessed by pressing the Medications icon.
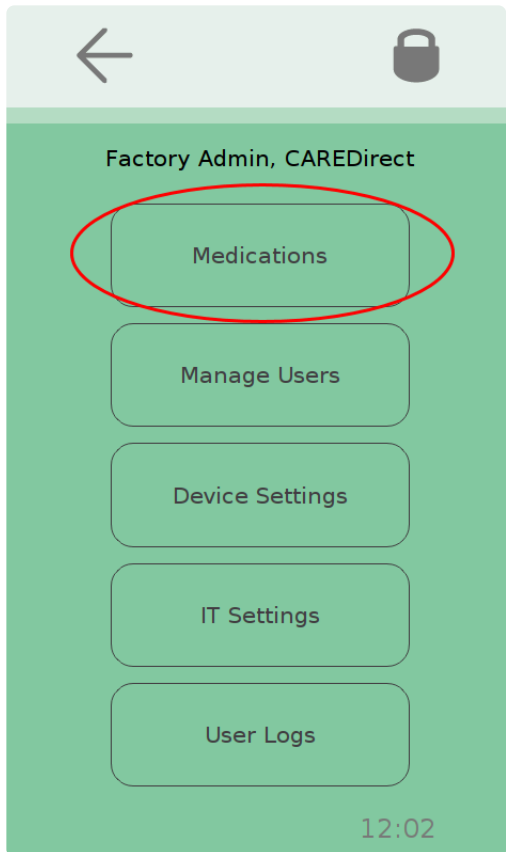
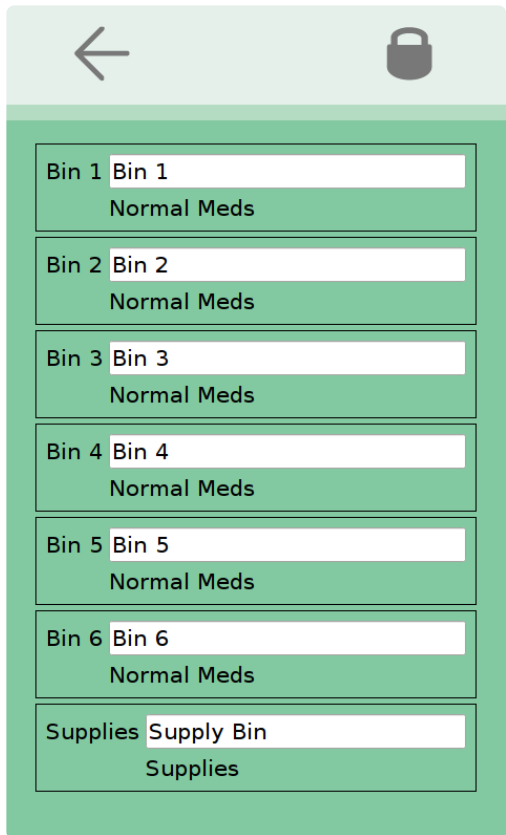This option has multiple features including:

- allowing the user to configure the bins within the cabinet and their contents (see Bin Configuration)
- view a list of the current medication inventory (See Medication List)
- change the reconcile settings (See Reconcile Settings)
- reconcile the contents of the cabinet (See Reconcile Now)

Factory Admin, CAREDirect

Bin Configuration

Medication List

Reconcile Settings

Reconcile Now

15:05

3.1. Bin Configuration

To access the Bin Configuration menu, select the Bin Configuration icon from the Medications Menu . This will open a screen that shows a general inventory view of the cabinet.

This menu allows the user to manage the inventories of each bin, including the supply bin and sidekick cabinet (If in use). Specific bins can be configured by individually selecting them from the menu above. Once a specific bin is selected, a screen like this will appear:

From this screen, the user will be able to see what is currently in the bin and will also be presented with a number of options which include:

- Naming the bin with a custom name
- Selecting the category of medication or supplies that is present
- Adding new medications or supplies to the bin
- Editing the current contents of the bin (Deleting, Returning, or Restocking medication/supplies)

To change the name of the bin, select the line at the top that has the current name. After selecting that, a keyboard will appear allowing the user to type in a new name. After typing the desired name, select the save icon at the top of the screen. This will return the user to the previous screen, with the updated name.

To change the category of supplies or medication present, select the drop down menu below the bin name. Upon doing this, an expanded drop down menu will appear with a list of options including:

- Supplies
- Cassette
- Normal Meds
- Accessory Cabinet
- Controlled substances
  Once the user selects the desired category, the drop down menu will condense and the category will update.

Below the drop down menu is a list of the current inventory for the selected bin. For each item a few pieces of information will be provided. This will include:

- Nickname
- Name
- Strength
- Unit of Measurement (UOM)
- Quantity
- Bin Name

Any of the items can be selected, and a new menu for that specific item will appear.
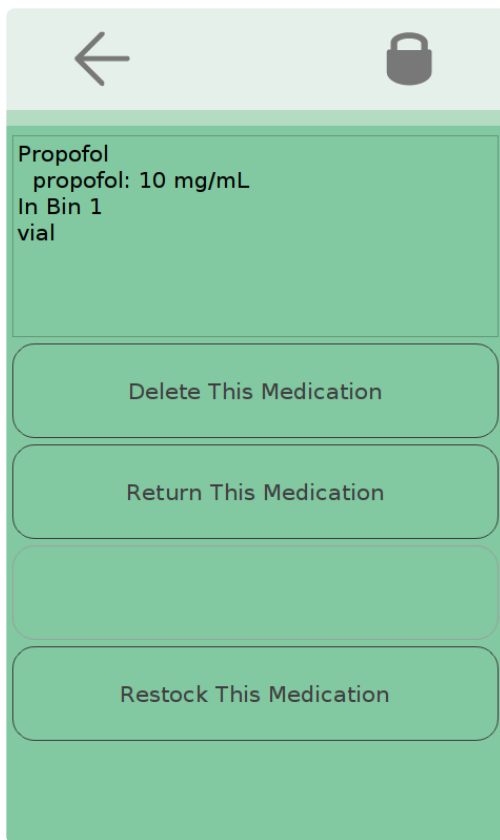
This menu will include options to

- Delete the medication
- Return the medication
- Restock the Medication

Select the desired options and follow the next steps as they appear on the screen. Complete the option by selecting the Save or Delete icon at the top of the screen.
Note: The steps and final icon will vary depending on the action being completed

Adding Medications

To add a medication to the bin, select the icon at the bottom of the screen that says, "Add a Medication to this bin". Upon clicking this, a keyboard will appear.

To search a medication, begin typing the name of the desired medication. As the user types, options will begin to appear. Once the user sees their desired medication, they can select the name and a new menu will appear. Note that the medication must first be entered into the system from the cloud portal in order for it to show up in the cabinet (see Facility Drug Maintenance)

The following screen will allow the user to choose how much medication they are adding to the bin. Once the correct amount is entered, select the save option at the top of the screen. This will return the user to the inventory menu for that bin with the updated medications and counts.

CANCEL	SAVE	🔒

Units of
ibuprofen
 ibuprofen: 400 mg/1
tb
to add to 'Bin 1'?

1	2	3	4	5	6	7	8	9	0	.

⌫	←	→

3.2. Medication List

This option can be accessed by selecting the Medication List icon from the Medications Menu. Upon selecting this, a list of all of the medications in the unit will appear.

This menu will provide the following information about the contents:

- Drug Nickname
- Base UOM
- If the contents are double locked

NickName	BaseUOM	DoubleLock
Dilaudid	ml	true
fentaNYL 2 mL	ml	true
fentaNYL 5 mL	vial	true
ibuprofen	tb	false
Morphine	ml	true
Narco	tb	true
Oxycontin	tb	true
Percocet	tb	true
Propofol	vial	false

3.3. Unlocking Bins that are Stocked with Medications
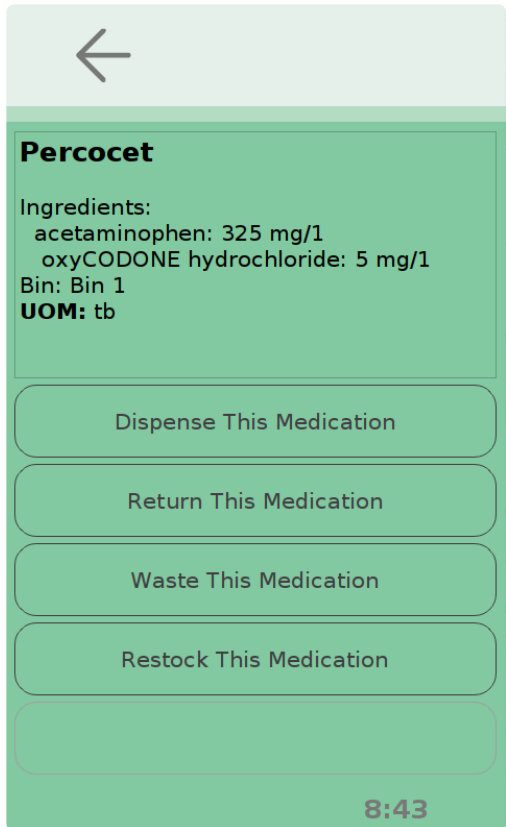
Unlocking Stocked Bins

When a selected bin is stocked with a medication, there is an extra step to complete before unlocking the bin (See Accessing the Bins). When the bin is selected, a new screen will appear with an inventory of that bin.
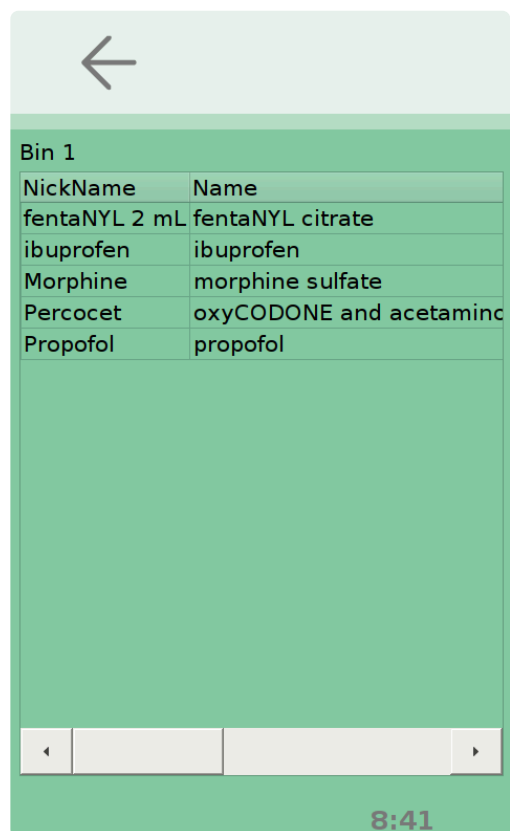
To open the bin, select the desired medication for use by pressing on the column for that medication. Once this is selected, a new screen will appear with information about the medication and options to:

- Dispense the Medication
- Return the Medication
- Waste the Medication
- Restock the medication

Percocet

Ingredients:
  acetaminophen: 325 mg/1
  oxyCODONE hydrochloride: 5 mg/1
Bin: Bin 1
UOM: tb

Dispense This Medication

Return This Medication

Waste This Medication

Restock This Medication

8:43

Choose the option that applies to the current situation. Upon doing this, a new screen will appear with one or two blanks to be filled out. These blanks will include one or both of:

- The quantity of medication (always included)
- The patient ID number whom the medication is for (included for certain actions)

Percocet

Ingredients:
  acetaminophen: 325 mg/1
  oxyCODONE hydrochloride: 5 mg/1
Bin: Bin 1
UOM: tb

Quantity to dispense:

Patient Id:

10:34

Fill these fields in by selecting the blank and then entering the corresponding numbers with the keyboard that appears. Be sure to press save after creating the entry. After all of the blanks are populated, select the icon at the top of the screen that corresponds to the current action being performed to unlock the bin.

Summary of the different actions with Medications

Action	Description	Net Effect on Running Count	Patient ID Required	Witness Required
Dispense	This is performed when removing a drug from the cabinet to administer to a patient.	Lowers running count by the amount dispensed	Yes	No
Return	After a medication has been removed and administered, some of that medication may remain because it was not administered. This action is done to **return** the remaining medication to the cabinet.	Raises running count by the amount returned	Yes	No

Waste	Similarly to when returning is performed, another option when medication remains after administering a dose to a patient is to waste the medication. Wasting involves disposing of the drug instead of returning it to the cabinet. Although the cabinet is not unlocked for this action, it **must** still be recorded that **wasting** was performed.	No net effect on running count	Yes	Yes
Restock	Restocking is performed whenever a medication is being refilled in the cabinet. This action has no relation to patients and is simply refilling the current stocks of medication within the cabinet.	Raises running count by the amount restocked	No	No

3.4. Count Backs and Double Locks

Double Locks

When medications are designated to require a double-locking system after opening a bin containing them, a second PIN will be required to open that bin. These designations are made under the Facility Drug Administration. User accounts are optionally provided with a second PIN when they are created (see Adding New Users).

> ✳ Note: if a second PIN is not assigned to a user, they will **not** be able to access any bins that contain a double-locked substance.

Countbacks

A medication may also be designated to require a count back whenever a bin containing those specified medications is opened. When this occurs, a screen will appear with the medication that needs to be counted, the amount that should be present and options asking if the count is **correct** or **incorrect**. After counting the medication, fill out the corresponding option by pressing it.

Percocet
Bin 1
tb
Current count is : 50

Count items before removing your take amount.

| Count is Correct |
| Count is NOT Correct |

8:47

If the count is **incorrect**, a new screen will appear asking the user to enter the amount that they counted.

Percocet
Bin 1
tb
Count the number of this in the bin.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | . |

⌫   ←   →

8:48

The system will update the count of that medication with the number entered and note the discrepancy in the user log (see User Logs)
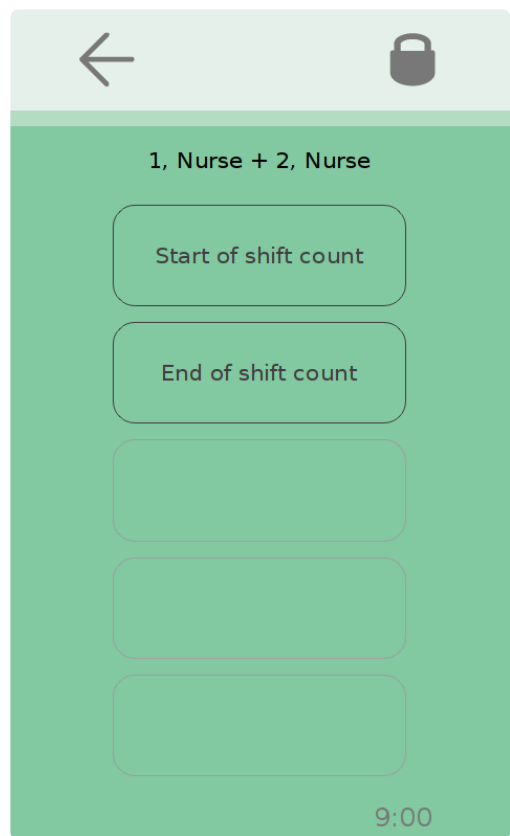
If a bin contains multiple medications and the one being used does not require a count or double lock, but another medication in the bin does, the user will still need to count the other medication and/or enter a second PIN to unlock that bin. Medications that require a double lock or count are determined and set by the cabinet administrator. However, it should be noted that these features are **MANDATORY** when a controlled substance is present.

> ! Note: Be sure to count the medication and answer if the count is correct **before** performing the current action. The count on the screen will be the count that should be in the cabinet prior to opening it. Failure to do this may result in a discrepancy that may affect the running count for future actions and counts.

3.5. Reconciliation

This option can be accessed by selecting the Reconcile Now icon from the Medication Menu. The next screen is dependent upon the configuration of the settings under Reconcile Settings. If a second user is required to witness the reconciliation, a screen with a pin pad will appear asking for a second user to sign in. Once the second user is logged into the system, the following screen will appear:

Note: if the "Reconcile Settings" does not require a witness (Second User/PIN), the system will bypass the second user login screen and continue to the screen above.

From this screen, the user will be able to select if they are completing their "Start of shift count" or "End of shift count". The user should select the option that applies to their current activity. After selecting their option, the following screen will appear:

← SAVE	
Bin	**Status**
Bin 1	NOT RECONCILED
Bin 2	NOT RECONCILED
Bin 3	NOT RECONCILED
Bin 4	NOT RECONCILED
Bin 5	No meds to count
Bin 6	NOT RECONCILED
Supply Bin	No meds to count
Accessory Cabinet	No meds to count

12:54

This screen will show the user which bins need to be reconciled and which ones do not. Bins that have yet to be reconciled will be highlighted in red with the words "NOT RECONCILED". Bins that do not need to be reconciled will not be highlighted and will read "No meds to count". To select a bin to reconcile, use the touch pad to specify which bin is being reconciled. Upon doing this, a new menu will appear with the specific medications that need to be reconciled in that bin.

Bin 1		
Status	NickName	Name
NOT RECONCILED	fentaNYL 2 mL	fentaNYL
NOT RECONCILED	ibuprofen	ibuprofer
NOT RECONCILED	Morphine	morphine
NOT RECONCILED	Percocet	oxyCODC
NOT RECONCILED	Propofol	propofol

9:01

Again, specific medications that still require reconciliation will appear in capital letters and will be highlighted in red. To begin counting a specific medication, select that medication from this menu. From there the following screen will appear:

← **SAVE**

Quantity of 'morphine sulfate' 'morphine sulfate: 10 mg/mL' currently in 'Bin 4'? Unit of Measure is 'ml'.

Quantity in the bin: [   ]

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | . |

| ⌫ | ← | → |

13:01

Once the drug is counted, the count should be entered and the save icon should be selected. This will return the user to the previous menu. If the count is correct,**Reconciled** will appear in "status" column next to that medication.

However, if there was a discrepancy in the count, the word **DISCREPANCY** will appear in the status column and will be highlighted in red.

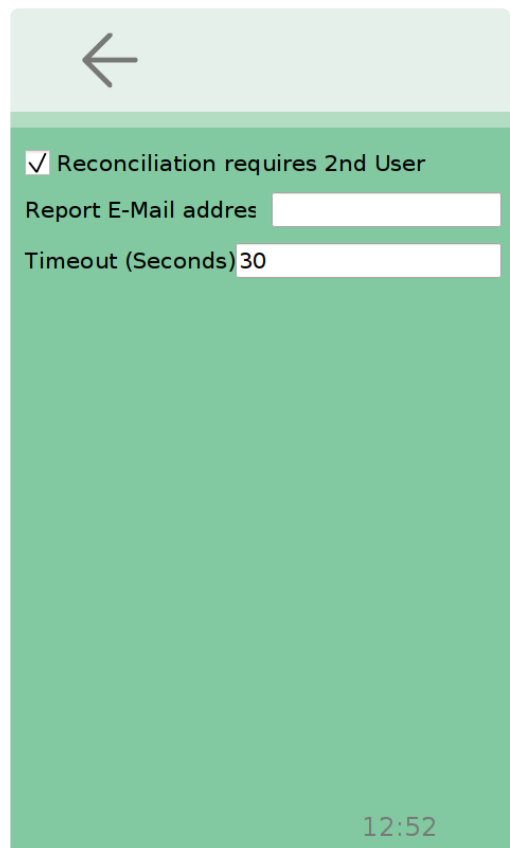| Bin 1		
Status	NickName	Name
Reconciled	fentaNYL 2 mL	fentaNYL
DISCREPANCY	ibuprofen	ibuprofen
DISCREPANCY	Morphine	morphine
Reconciled	Percocet	oxyCODC
DISCREPANCY	Propofol	propofol

9:03

This process should be repeated for every medication that needs to be reconciled.

3.5.1. Reconcile Settings

This option can be accessed by selecting the Reconcile Settings icon from the Medications Menu. Upon doing this, the following screen appears:

This option allows the user to choose if reconciliation must require a witness (second user) present, the email address that reconcile data is forwarded to, and the timeout time for reconciliation.

To choose if reconciliation requires a second user or not, check the checkbox by pressing it. When checked, a second user will be required to enter their PIN prior to reconciliation.

To update the email that reconciliation data will be sent to or the timeout time, select the blank and use the keyboard to enter the desired information.

Whenever any of these settings are updated, be sure to press the save icon before leaving the screen to assure that the information updates correctly.

4. Manage Users

This feature can be accessed within the settings menu. To open this feature, select the Manage Users icon. The following screen will appear:
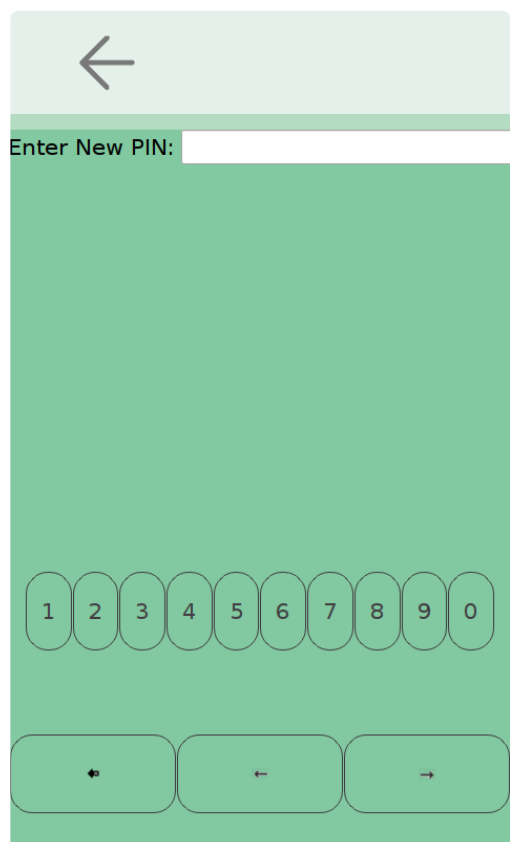
←	Add New User

☑ Enabled   ☐ Disabled

Name
abcd,assistant
Bunny,Bugs
Factory Admin,CAREDirect
fhj,hgjj
Holmes,Sherlock
j,steve
l,joe
LMN,DEF
s,n
Sheppard,Robin
Snow,Jon

4.1. Adding New Users

Adding New Users with a PIN ID

To add a new user, select the icon that says **Add New User** at the top of the screen. From there, the user will be prompted to enter a new PIN for the new user.

After choosing a PIN, the following screen will appear:

CANCEL

PIN 3489

Second PIN

Last Name

First Name

User Type   Cabinet - Nurse

☑ Enabled

☐ Temporary user expires:

	January 2020					
	Sun	Mon	Tue	W...	Thu	Fri	Sat
1	29	30	31	1	2	3	4
2	5	6	7	8	9	10	11
3	12	13	14	15	16	17	18
4	19	20	21	22	23	24	25
5	26	27	28	29	30	31	1

0   ▲▼   : 0   ▲▼   : 0   ▲▼

In this menu, the user will be able to change the original PIN that they set, create a secondary PIN for the new user, enter the new user's first and last names, choose the type of new user, choose if that user is **Enabled** or **Disabled** (see Managing Current Users), and choose if the new user will be able to use the cabinet indefinitely or just temporarily (see Temporary Users).

To change the original PIN, choose a secondary PIN, or enter the new user's first and last names, the user can select the desired field by selecting the corresponding blank. From there, a keyboard will appear allowing the user to enter the desired information. Once the information is entered, select the **save** icon at the top of the screen. This will return the user to the previous screen and update the information entered. These steps should be repeated for all of the required fields. To change the **User type**, the drop down menu can be selected. This will provide the user with a list of options which include:

- Cabinet – Admin
- Cabinet – Assistant
- Cabinet – IT
- Cabinet – Manager
- Cabinet – Nurse
- Cabinet – Pharmacy
- Company Administrator

The desired category should be selected, and the field will update as the drop down menu condenses. This field determines the privileges of that specific user when using the system (See Below).

Adding New Users with a Badge ID

The process of adding a new user with a badge ID differs slightly from adding a new user with a PIN. The first thing that should be checked is that there is an RFID card reader installed on the cabinet.

Once this is confirmed, proceed to add a new user the same way as before with a PIN idea. Upon doing this, the same screen will appear as before, asking to enter a new PIN

When this screen appears, simply scan the desired badge on the RFID reader. The PIN blank will populate and the same screen that appears after entering a primary will appear. Proceed in the same manner as before to finish adding the user.

User Privileges

The following table summarizes the privileges for each type of user:

User Type	Access Med Bins	Access Supplies	Unlock Cassette	Modify Users	Modify Settings	Access to cloud portal
Company Admin	Yes	Yes	Yes	Yes	Yes	Yes
Cabinet Admin	Yes	Yes	Yes	Yes	Yes	No

Manager	Yes	Yes	Yes	Yes**	No	No
Nurse	Yes	Yes	Yes	No	No	No
Pharmacy	Yes	Yes	Yes	No	No	No
Assistant	No	Yes	No	No	No	No
IT	No	No	No	No	Yes	No

4.2. Temporary Users

Temporary Users

The field on the bottom can be used to give a user temporary access to the system. This field has a check box option that can be checked and unchecked like the box above and is labeled **Temporary user expires**. When the box is checked, a calendar appears and a date and time can be selected for that user's expiration. Once a date is manually selected, the new user's access will be terminated at the specified date and time. If the box is unchecked, the user will have indefinite access to the system so long as their account is still **Enabled**.

Once every field is completed with the necessary information, the user can select the save button at the top of the screen. When this option is selected, the system will take a moment to assure that the selected PINs are available for use. If the PINs are available, the system will update and add the user.

4.3. Managing Current Users

Managing Current Users

In addition to adding new users, this menu also allows the user to manage current users. To manage a specific user, select the name from the "Manage Users" menu. Upon selecting a name, the user will be brought to the same screen that they used to add a user. In this screen, the user can edit any of the fields that are currently entered. Upon making any edits, select the save icon to update the information. Once the new information is saved, the back arrow can be selected to return to the **Manage Users** menu.

Instead of deleting users from the system, users can be Enabled and Disabled from using the system instead. This is implemented so that all of the information in the User Logs (see User Logs) can accurately remain in the system, even when a user will never be accessing the cabinet again. Below the **User Type** drop down menu is a check box labeled **Enabled**. The box can be checked and unchecked by selecting it. When the box is checked, the user is **Enabled** to enter and use the system. When unchecked, the user is **Disabled**.

4.4. Filtering the Current User List

Filtering the User List

Above the list of current users are two check boxes labeled "Enabled" and "Disabled". These boxes indicate which users will be shown on the list below. When the specific box is checked, the users under that category will be shown on the list.

For example, when the boxes are both checked, the list will include both the users who are enabled and those who are disabled.

4.5. User Logs

This feature can be accessed from the Settings Menu by selecting the User Logs icon. Once selected, a log of all of the activity within the system is presented to the user. This log includes:

- The Users name
- The activity
- The item accessed (i.e. Bin 1)
- The description of the activity
- The exact date and time (to the second)
- The device used (Cabinet name)

All of this information is provided for every single activity done within the system. Additionally, all of the information from this log is sent to the cloud server and portal for remote access (see Online Cloud Portal).

5. Settings Menu

When logged into the system, the settings menu can be accessed from the Main User Screen by pressing the Settings Icon at the top of the screen.

Once the Settings Menu is opened, there are a number of options including

- Medications
- Manage Users
- Device Settings
- IT Settings
- User Logs
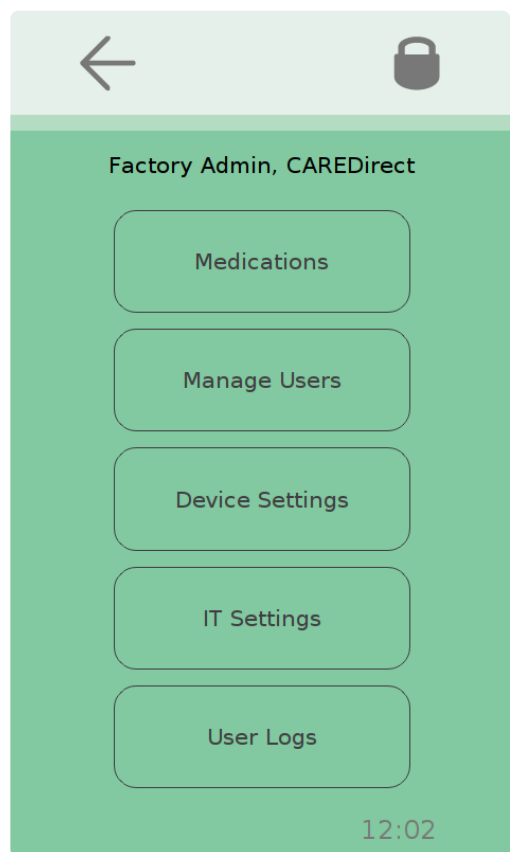
5.1. Device Settings

This feature can be accessed from the Settings Menu. To access it, select the Device Settings icon. The following screen will appear, allowing access to a number of features:

Timeout time

The timeout time is manually set by the user. This feature works by automatically locking all of the bins and logging the user out after a period of inactivity, determined by the time set. To set the time, select the corresponding blank and enter the desired time with the keyboard (in seconds). Be sure to press the save icon to update the time. The range for time can be set between 10-200 seconds.

Cabinet name

This feature allows the user to create a custom name for the cabinet. This name will appear on the server and in the portal for that specific cabinet (see " ", Section .). To edit this name, select the blank and type in the desired name with the keyboard. Be sure to press the save icon before returning to another screen.

Enable Automatic Supply Bin Opening

When enabled, this feature automatically opens up the supply bin when a different bin is accessed. To enable this, press the check box next to the feature name. When the box is checked, this feature is enabled.

Enable Cassette Removal

This feature allows for the entire cassette to be removed from the cabinet. To enable the feature, check the corresponding box in the Device Settings menu (see Removing the Cassette).

Enable Accessory Cabinet

This feature enables the use of the Sidekick accessory cabinet (see Sidekick)

Use Small Keypad For Login

When this feature is enabled, a small keypad appears on the login screen instead of the traditional one. This feature can be enabled for security reasons so a user can better-protect their PIN from view when logging in. Enable this feature by checking the corresponding box.
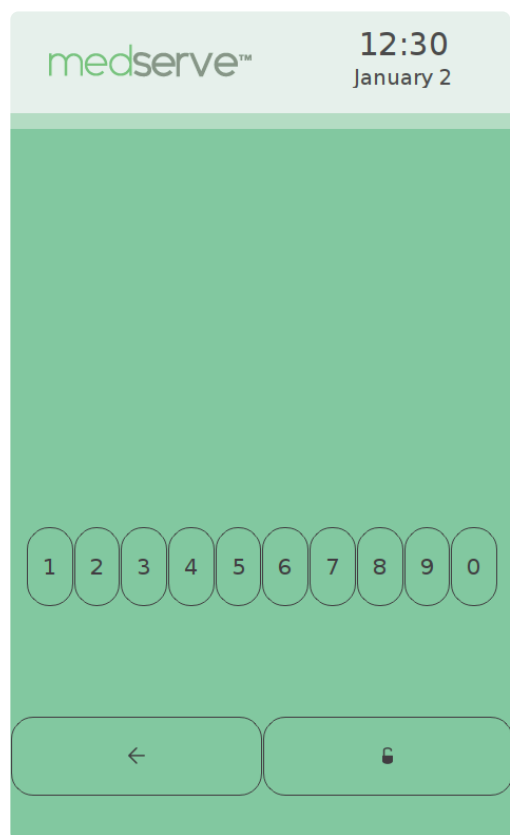
Select By Medication instead of by bin

This feature allows the user to open the cabinet from a medication list instead of the standard method of choosing bins (see Accessing the Bins)

Edit After Hours Settings

This feature can be accessed by selecting the Edit After Hours Settings icon at the bottom of the Device

Settings menu. Once selected, the following screen is presented:

CANCEL	SAVE

This feature prevents access to the cabinet outside business hours, except by administrators. You may set a schedule for this feature or manually enable and disable it.

Lockout Now ▾

Day	Available	Start	End
Sunday	☐	08:00	17:00
Monday	☑	08:00	17:00
Tuesday	☑	08:00	17:00
Wednesday	☑	08:00	17:00
Thursday	☑	08:00	17:00
Friday	☑	08:00	17:00
Saturday	☐	08:00	17:00

Times are specified in 24 hour format.

12:29

This feature prevents access to the cabinet outside of business hours when activated, except for Administrators. There is a drop down menu with multiple options which includes:

- Disable Afterhours lockout
- Lockout now
- Use Schedule below

When Disable Afterhours lockout is selected, the cabinet has no restrictions on who can access it outside of normal business hours, provided that the user has a valid PIN. When Lockout now is selected, the cabinet immediately locks out anyone who isn't an administrator.

When the **Use Schedule Below** option is selected, the weekly view calendar at the bottom of the screen becomes available for editing. The user can manually edit this calendar to specify the hours that non-administrators **can** access the cabinet.
Once the hours have been specified, and/or any of the three options have been selected, the user can use the save icon to apply the changes.

5.2. IT Settings

The IT settings menu can be accessed from the settings menu by selecting the IT Settings icon. Once selected, the user is brought to a new menu. This menu includes the following options:

- Network Settings
- Date and Time Settings
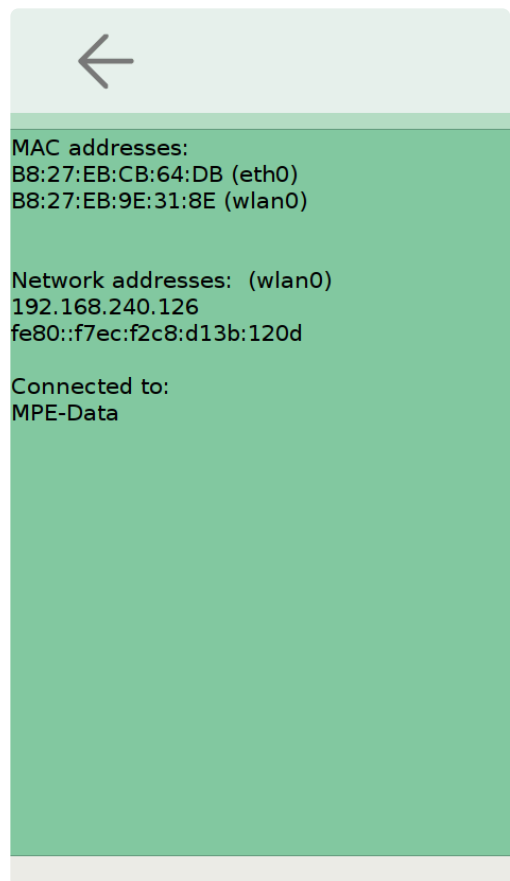- Cloud Settings
- Firmware Updates
- Other…
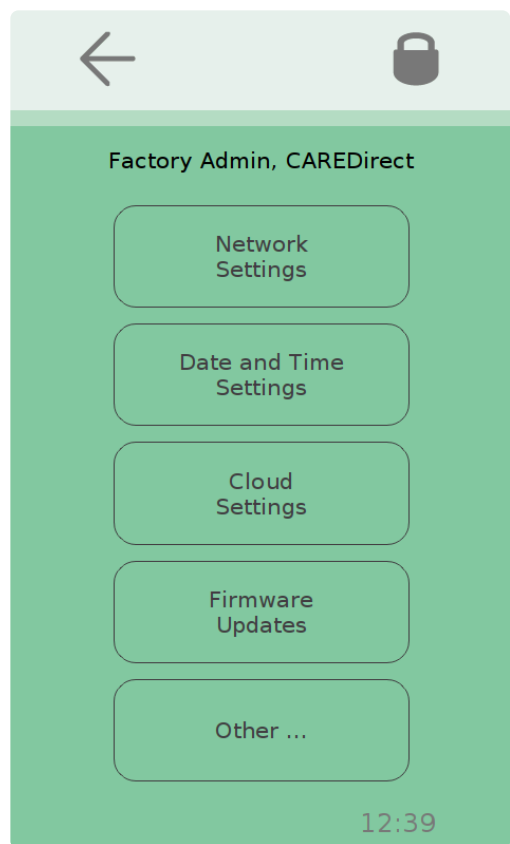
5.2.1. Network Settings

This menu can be accessed from the IT Settings Menu by pressing the Network Settings icon. after selecting this, a new screen will appear with a list of available networks to join. Additionally, there will be two icons at the top of the screen labeled **Scan** and **Information**.
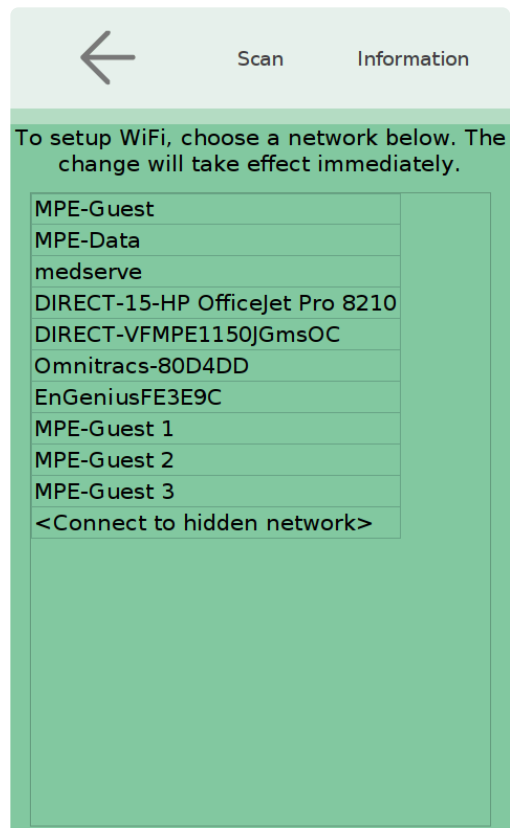
The Scan icon will scan for wireless networks when pressed. If the Information icon is pressed, a new screen will appear with some information about the current network status. This information will include the MAC address, Network Addresses, and Connection Status and the network that the system is connected to (if applicable).

MAC addresses:
B8:27:EB:CB:64:DB (eth0)
B8:27:EB:9E:31:8E (wlan0)

Network addresses: (wlan0)
192.168.240.126
fe80::f7ec:f2c8:d13b:120d

Connected to:
MPE-Data

Joining Wireless Networks

To join a wireless network, begin on the screen that appears after pressing the Network Settings icon. From the list of available networks, choose the desired network to connect to and press it. A new screen should appear. This screen will either include two icons that read **Connect** and **Forget** or include a prompt asking for the network passphrase and a blank to enter the passphrase. In the first situation, choose to connect to the network with the Connect icon and enter a passphrase if prompted afterwards. In the second situation, simply enter the passphrase. Be sure to press the save icon after entering a passphrase to update the information. To check that a network connection was established, use the Information icon to check the network status.

Connecting to a Network Via Ethernet

To make an Ethernet connection, the front panel must be removed to access the Ethernet port on the embedded computer. The access panel can be removed by first removing the cassette and then removing the 3 screws that secure the access panel to the cabinet. Please see the Installation Instructions information on accessing the Ethernet port and completing the Ethernet connection (Other Manuals).

5.2.2. Date and Time Settings

This option can be selected from the IT Settings menu by selecting the Date and Time Settings icon.

Upon selecting this option, the user will be brought to the following menu:
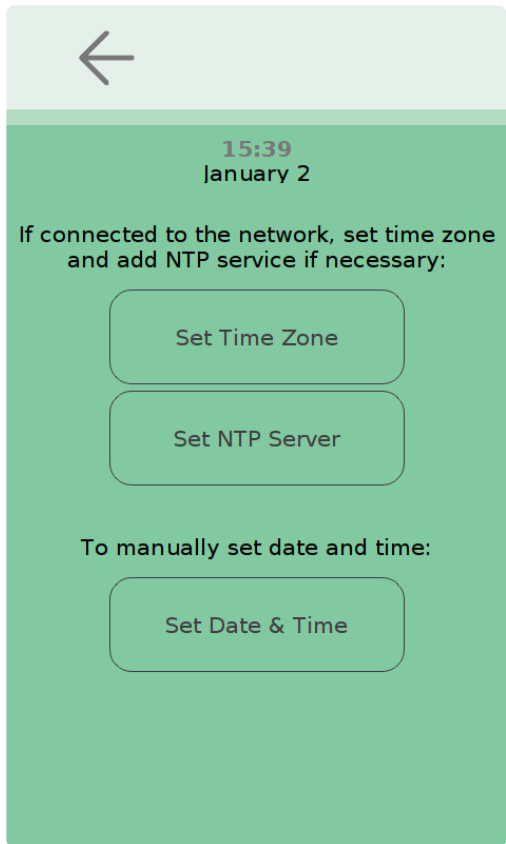
This menu provides the current date and time at the top of the screen and multiple options which include:

- Set time zone
- Set NTP server
- Set Date & Time

Setting the Timezone

The set time zone feature can be selected by choosing the "Set time zone" icon from the "Date and Time Settings" menu. Once selected, the user will be provided a list with all of the available time zones and a prompt saying "Select Area".

Depending on the selection the user makes, they may be brought to another screen that has more specific options for a time zone to choose. From there, the user can select a time zone that applies to their location. Once selected, the user will be prompted "Set this time zone?" followed by the selected time zone. If this is the desired time zone, the user can select the save icon which will update the time zone.

In some situations, the user will only need to select one time zone from the larger list and then receive the prompt to set that time zone. However, in all situations, the user must select the save icon to officially update the time zone.

Setting an NTP Server

The Network Time Protocol (NTP) server feature can be selected by choosing the **Set NTP Server** icon from the **Date and Time Settings** menu. The cabinet must have an active network connection to synchronize date and time to an NTP server. To use this feature:

- Ensure that the cabinet is connected to the network (see Network Settings).
- If necessary, add or delete NTP servers by pressing the **Set NTP Server** button
- To add a server, press "Add NTP Server". To delete a server, click on the server address you wish to delete and confirm the deletion.
- Set the time zone by pressing the **Set Time Zone** button from the main Date & Time Settings screen.

Manually Setting the Date and Time

The last option within this menu allows the user to manually set the date and time for the system. To access

this, the user can select the "Set Date & Time" option from the "Date and Time Settings" menu. Upon selecting this, a screen with a calendar and digital clock will appear.
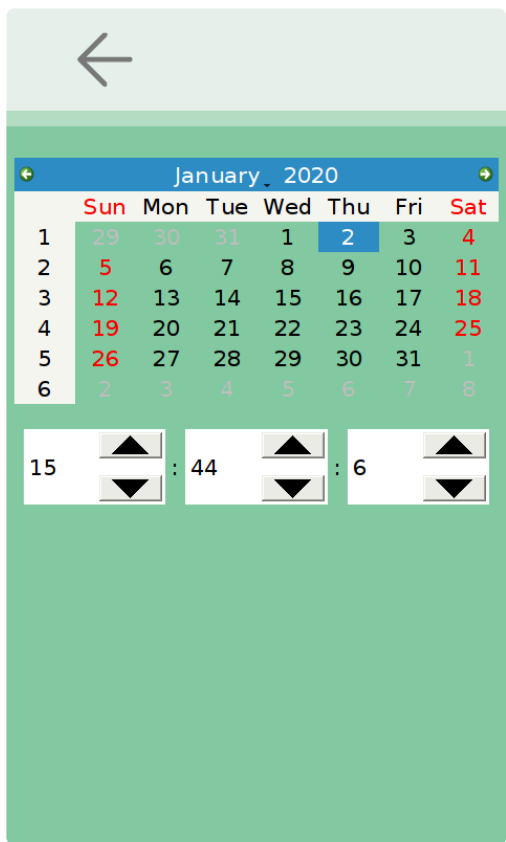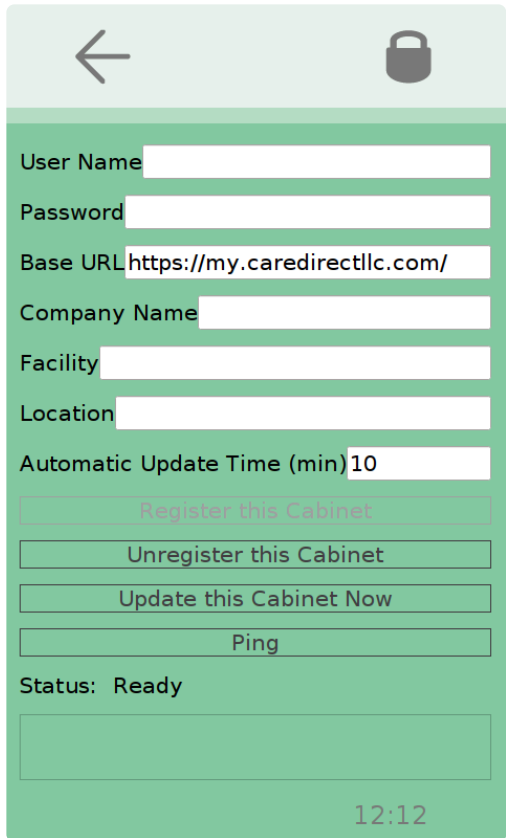
The user can use this screen to manually set the date and time for the system. Upon completing this, the user can press the save icon to update the date and time.

Other Notes

- Network Time Protocol (NTP) is a networking protocol for clock synchronization between computer system
- In most situations, the list of NTP servers do not need to be modified. Contact your network administrator for questions about NTP servers.
- If date and time are set manually, the incorrect date and time may be displayed if the cabinet loses power (i.e. in the case of a power outage). Time zone and NTP server settings are retained through a power outage.

5.2.3. Cloud Settings

The **Cloud Settings** can be accessed from the **IT Settings** menu by selecting the **Cloud Settings** icon. Once this menu is opened, the following screen will appear:

Registering the Cabinet with the Cloud

The primary function within the cloud settings is registering the cabinet with the online cloud portal. To do this:

1. Enter the associated email into the **User Name** blank
2. Enter the account password for that email (see Accessing the Cloud Portal for the First Time)
3. Make sure the **Base URL** is correct (this will most likely be https://my.caredirectllc.com/)
4. Enter the Company Name in the **Company Name** blank. Make sure the name is spelled/abbreviated with the same notation as shown on the CAREDirect cloud portal website
5. After all of these fields have been populated, select the **Register this Cabinet** icon. The cabinet will take a few seconds to register. When the **Status:** field at the bottom of the screen says **Ready**, the cabinet will be registered.

> ✳ Another way to double check that the cabinet is registered with the cloud servers will be to check if the cabinet shows up under the Cabinet Administration section on the online cloud portal. See that section for more information.

Other Functions within this Section

The **Automatic Update Time** field can be edited to change the time period in which the cabinet automatically syncs with the cloud. This time is in minutes and can be set by selecting the blank and typing in the desired time. Be sure to press save.

The **Update this Cabinet Now** icon can be used to manually sync the cabinet's data with the cloud at any time. Press this icon to do this.

5.2.4. Firmware Update

The **Firmware update** icon can be found within the **IT Settings** menu. Once selected, a list of available firmware updates will appear.

Version	Date/time	Is B
1387	2019-12-21T18:26:51.8372083Z	

15:55
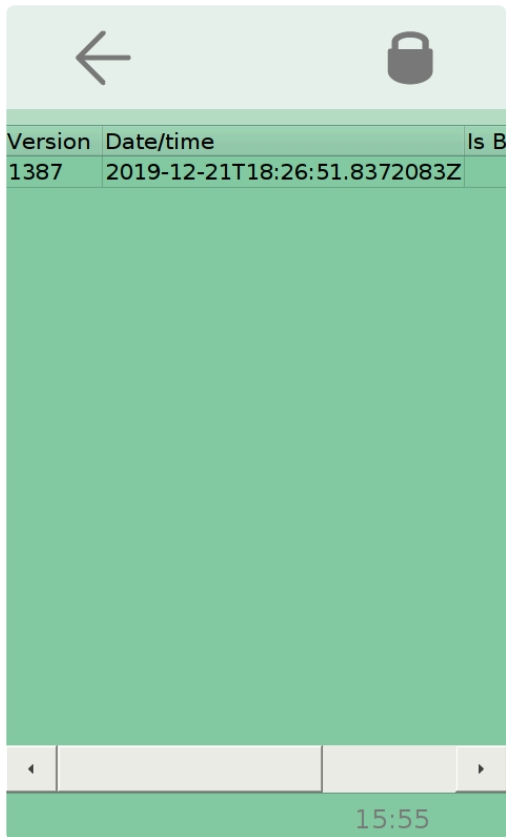
Select the desired update from the list and a **confirm** icon will appear on the top, center portion of the screen. Press this icon after it appears. Once **confirm** is selected, the system will reboot. After the reboot is complete, the new firmware will be installed.

5.2.5. Imprivata Configuration

Cabinets can be configured to use Imprivata Single Sign On's server to authenticate users. With this configuration users would be identified through a lookup on Imprivata servers. The system would then lookup security groups for the user in Active Directory (AD). The AD security group would determine whether a user is granted access to the cabinet and also what permissions the user will have in the cabinet.

By default, the following AD user groups are mapped to the specified User Type on the cabinet. If a user belongs to multiple groups, permissions on the cabinets will be mapped to the user type with the highest priority (1 being the highest priority).

Priority	AD Security Group	Cabinet User Type
1	Cabinet-Admin	Cabinet – Admin
2	Cabinet-IT	Cabinet – IT
3	Cabinet-Manager	Cabinet – Manager
4	Cabinet-Pharmacy	Cabinet – Pharmacy
5	Cabinet-Nurse	Cabinet – Nurse
6	Cabinet-Assistant	Cabinet – Assistant

To use the Imprivata SSO, each cabinet must be properly configured. To access these Settings, choose, "Imprivata Settings" under the "IT Settings" menu.

Imprivata Server

URL ://   /sso/ProveIDWeb/v1/

Active Directory

Server

Port 389

Username

Domain

Password

Imprivata Settings

- **URL:** https://[Imprivata_server_address]/sso/ProveIDWeb/v1/

AD Settings

- **Server:** Address for AD server
- **Port:** LDAP port
- **Username:** Windows username used for LDAP lookups
- **Domain:** Domain associated with the above username
- **Password:** Password associated with the above username

5.3. Other Setting Options

Within the **IT Settings** menu, there is an icon labeled **Other…**. By selecting this icon another window will appear with a few options and some information about the system.

- At the top of the screen, the firmware version will be shown (see Firmware Update)
- The **Restart Program** icon will log the user out and reset the session. The entire system will not restart with this command.
- The **Reboot System** icon will send the system into a full reboot. The system will shut off completely and restart when this icon is selected.
- The **License Information** icon can be selected to find more information related to the License

6. Online Cloud Portal

To access the online cloud portal, go to the online cloud portal login page (CAREDirect online cloud portal). From there, enter a valid email and password and log in. For more information about accessing this page or logging in, see Accessing the Cloud Portal for the First Time.

6.1. Accessing the Cloud Portal for the First Time

Accessing the CAREDirect Online Portal

For first time cloud users, an email should be sent to the associated address with information about accessing the cloud. This email should include a temporary password that can be used for logging into the cloud.

The online cloud portal can be accessed by typing in my.caredirectllc.com into your web browser. The link is also provided here (CAREDirect online cloud portal).

Once this page is accessed, the following screen will appear:
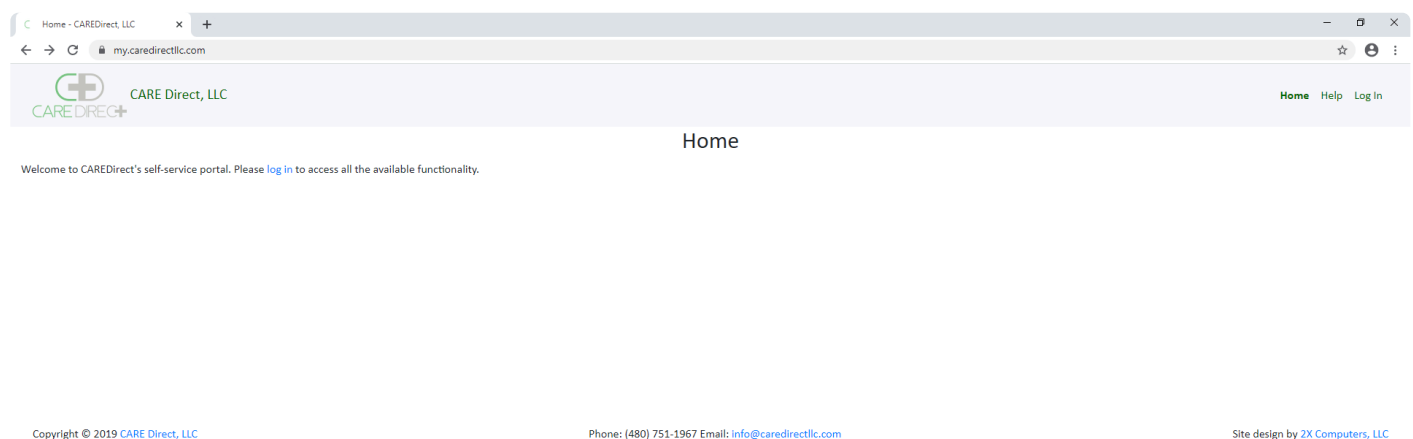
Logging In for the First Time

To continue, a login is required. Select the Log In icon on the top right of the screen or the blue log in link near the middle of the screen to do this.

The next screen will prompt the user to enter the email and password associated with their account.
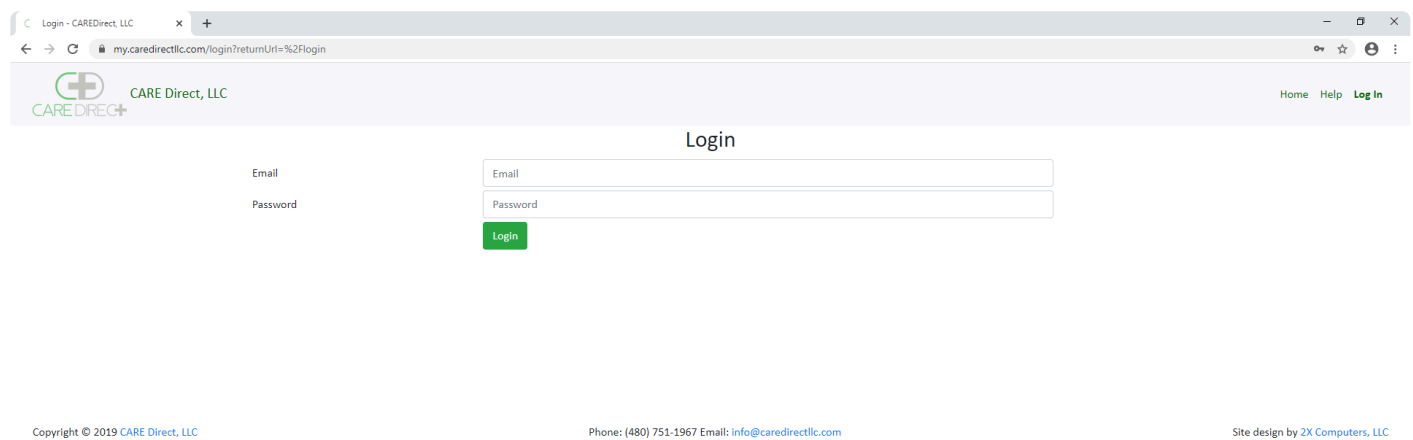
Enter the associated email and temporary password into the corresponding fields on this menu and click login. If the login credentials are correct, the same screen will remain, except a new drop down menu will

appear. Click on this drop down menu and search for the associated company. Click on that company name and click login again. If all of the information is correct, this should take the user to the main dashboard screen. For more information about the main dashboard, See Main Dashboard.

Changing the Temporary Password to a Permanent One

Once on the dashboard page, the next step is to change the temporary password to a permanent one that will be used for all future logins. To do this, click on the My Account icon on the top right portion of the screen.
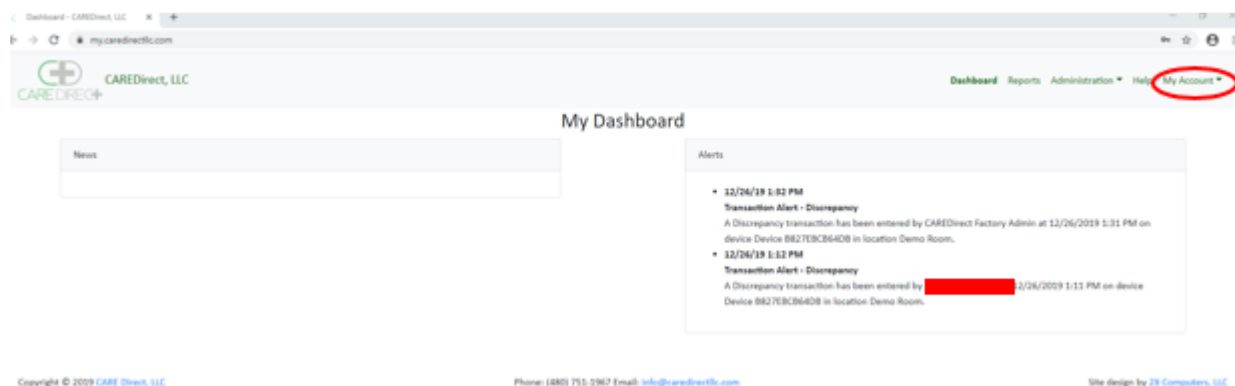
After clicking this, a drop down menu with a few options will appear. These options will include:

- My Account
- Settings
- Log Out

Select the **My Account** option to continue. When this is selected, the following screen will appear:
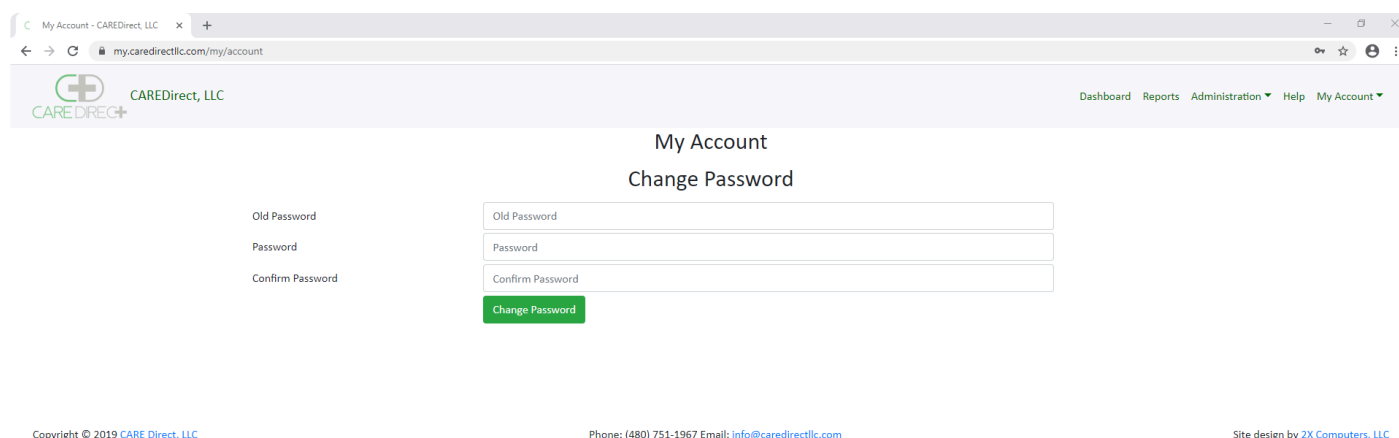
From this screen, enter the temporary password into the **Old Password** blank, and enter a new password of your choice into the **Password** and **Confirm Password** blanks. Then, select the **Change Password** icon to update the account's password. The new password entered will now be used for any logins in the future. For more information about using the online cloud portal, see Online Cloud Portal.

6.2. Main Dashboard

After logging into the online cloud portal, the first screen that will appear will be the **Main Dashboard**. This screen looks as follows:
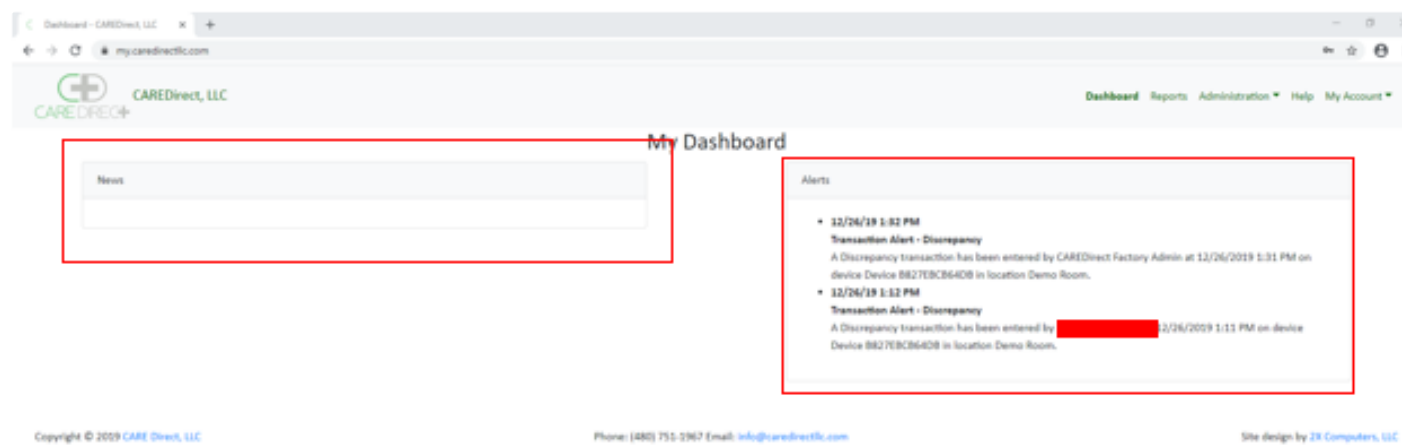
The two main elements from this screen are **News** and **Alerts**, which are highlighted by the red boxes.

News

The News section of this screen will include any news related to updates with the cabinet system. This will include any new software updates or other important new information.

Alerts

The Alerts section will include any alerts related to the cabinet. This will include discrepancies in medication counts or uncounted medications. A few examples of alerts are provided in the image above.

Other Features

Other features that can be accessed from this menu can be found on the top right portion of this screen. The features include:

- Reports
- Administration
- Help
- My Account

The Main Dashboard can also be accessed from this part of the screen from other pages by clicking the **Dashboard** icon

6.3. Reports
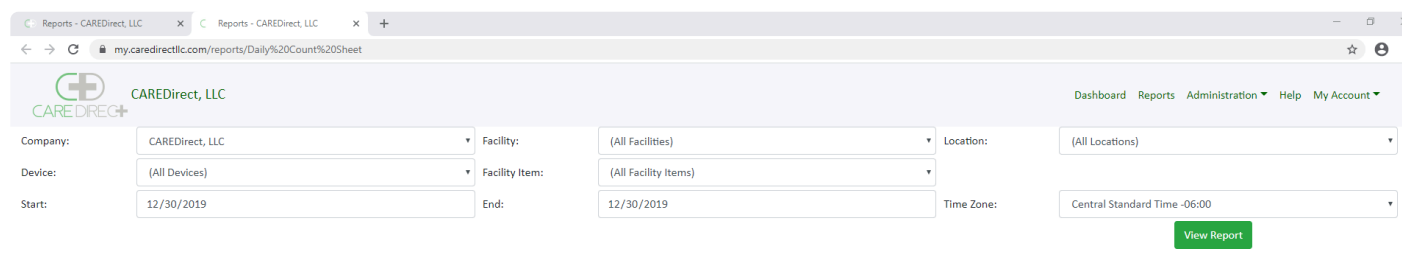
The Reports section can be accessed by clicking the **Reports** icon in the top right portion of the screen. This can be accessed from the Main Dashboard or another screen within the portal, as long as a user is logged on.

From this screen, the following options exist:

- Reconciliation Report
- Inventory Transaction Log

Reconciliation Report

The reconciliation report can be accessed by selecting the **Reconciliation Report** icon from the Reports menu. The Reconciliation Report provides a record of all of the activity performed in the cabinet related to medications and supplies. The sheet is organized by the medication name and bin name. This means that every medication in every bin will have its own section about the transactions related to that specific element. All of these individual records will be compiled into the report.

To access a Reconciliation Report, select the green **View Report** icon from this screen. All of the other fields can be used to customize the content that will appear on the Reconciliation Report. This information includes but is not limited to:

- The dates included
- The Facilities included (if multiple facilities exist)
- Facility Item (A facility must be chosen prior)
- The cabinets included (if multiple cabinets exist)
- The Company
- The location
- The time zone

An example of a Reconciliation Report is provided below:

CAREDirect Reconciliation Report
CAREDirect, LLC, Demo Room - 1/6/2020 - 1/7/2020

Timestamp	Transaction Type	Transaction Quantity	UOM	Running Total	Patient	Signature	Witness	Notes
Device: Recovery Center								
fentaNYL in bin "Bin 1"								
	Starting Balance			0.00				
1/7/2020 2:39 PM	Stock	10.00	ml	10.00		CAREDirect Factory Admin		
1/7/2020 2:40 PM	Countback	10.00	ml	10.00		Nurse 1		
1/7/2020 2:40 PM	Dispense	2.00	ml	8.00	2358	Nurse 1		
1/7/2020 2:42 PM	Starting Count	8.00	ml	8.00		Nurse 1	Nurse 2	
1/7/2020 2:42 PM	Countback	8.00	ml	8.00		Nurse 2		
1/7/2020 2:45 PM	Countback	8.00	ml	8.00		Nurse 2		
1/7/2020 2:45 PM	Stock	5.00	ml	13.00		Nurse 2		
1/7/2020 2:45 PM	Countback	13.00	ml	13.00		Nurse 2		
1/7/2020 2:46 PM	Countback	13.00	ml	13.00		Nurse 2	Nurse 1	
1/7/2020 2:46 PM	Dispense	2.00	ml	11.00	7422	Nurse 2	Nurse 1	
1/7/2020 2:46 PM	Waste	1.00	ml	11.00	5794	Nurse 2	Nurse 1	
1/7/2020 2:47 PM	Countback	11.00	ml	11.00		Nurse 2	Nurse 1	
1/7/2020 2:52 PM	Not Counted	0.00	ml	11.00		Nurse 1	Nurse 2	
ibuprofen in bin "Bin 1"								
	Starting Balance			0.00				
1/7/2020 2:39 PM	Stock	400.00	ml	400.00		CAREDirect Factory Admin		
1/7/2020 2:42 PM	Starting Count	400.00	ml	400.00		Nurse 1	Nurse 2	
1/7/2020 2:42 PM	Dispense	4.00	ml	396.00	4686	Nurse 2		
1/7/2020 2:52 PM	Ending Count	396.00	ml	396.00		Nurse 1	Nurse 2	
Morphine in bin "Bin 1"								
	Starting Balance			0.00				
1/7/2020 2:39 PM	Stock	25.00	ml	25.00		CAREDirect Factory Admin		
1/7/2020 2:40 PM	Countback	25.00	ml	25.00		Nurse 1		
1/7/2020 2:42 PM	Starting Count	25.00	ml	25.00		Nurse 1	Nurse 2	

Inventory Transaction Log

The Inventory Transaction Log can be accessed by selecting the **Inventory Transaction Log** icon from the Reports menu. The Inventory Transaction Log provides a record of all of the activity performed in the cabinet, similar to the Daily Count Sheet. The difference between the reports is that the Inventory Transaction Log provides a chronological report of the activity performed. This option will bring up a new screen that looks like the following:

To access the Inventory Transaction Log, select the green **View Report** icon from this screen. All of the

other fields can be used to customize the content that will appear on the Inventory Transaction Log. This information includes but is not limited to:

- The dates included
- The Facilities included (if multiple facilities exist)
- Facility Item (A facility must be chosen prior)
- The cabinets included (if multiple cabinets exist)
- The Company
- The location
- The time zone

An example of an Inventory Transaction Log is provided below:

CAREDirect Inventory Transaction Log

Facility	Location	Device	Item	Bin	Timestamp	Transaction Type	Quantity	UOM	Running Total	Patient	Signature 1	Signature 2
Headquarters	Demo Room	Recovery Center	fentaNYL 2 mL	Bin 1	1/7/2020 2:39 PM	Stock	10.00	ml	10.00		CAREDirect Factory Admin	
Headquarters	Demo Room	Recovery Center	Percocet	Bin 1	1/7/2020 2:39 PM	Stock	50.00	ml	50.00		CAREDirect Factory Admin	
Headquarters	Demo Room	Recovery Center	ibuprofen	Bin 1	1/7/2020 2:39 PM	Stock	400.00	ml	400.00		CAREDirect Factory Admin	
Headquarters	Demo Room	Recovery Center	Morphine	Bin 1	1/7/2020 2:39 PM	Stock	25.00	ml	25.00		CAREDirect Factory Admin	
Headquarters	Demo Room	Recovery Center	Propofol	Bin 1	1/7/2020 2:39 PM	Stock	125.00	ml	125.00		CAREDirect Factory Admin	
Headquarters	Demo Room	Recovery Center	fentaNYL 2 mL	Bin 1	1/7/2020 2:40 PM	Countback	10.00	ml	10.00		Nurse 1	
Headquarters	Demo Room	Recovery Center	Morphine	Bin 1	1/7/2020 2:40 PM	Countback	25.00	ml	25.00		Nurse 1	
Headquarters	Demo Room	Recovery Center	Percocet	Bin 1	1/7/2020 2:40 PM	Countback	50.00	ml	50.00		Nurse 1	
Headquarters	Demo Room	Recovery Center	fentaNYL 2 mL	Bin 1	1/7/2020 2:40 PM	Dispense	2.00	ml	8.00	2358	Nurse 1	
Headquarters	Demo Room	Recovery Center	fentaNYL 2 mL	Bin 1	1/7/2020 2:42 PM	Starting Count	8.00	ml	8.00		Nurse 1	Nurse 2
Headquarters	Demo Room	Recovery Center	Propofol	Bin 1	1/7/2020 2:42 PM	Starting Count	125.00	ml	125.00		Nurse 1	Nurse 2
Headquarters	Demo Room	Recovery Center	ibuprofen	Bin 1	1/7/2020 2:42 PM	Starting Count	400.00	ml	400.00		Nurse 1	Nurse 2
Headquarters	Demo Room	Recovery Center	Percocet	Bin 1	1/7/2020 2:42 PM	Starting Count	50.00	ml	50.00		Nurse 1	Nurse 2
Headquarters	Demo Room	Recovery Center	Morphine	Bin 1	1/7/2020 2:42 PM	Starting Count	25.00	ml	25.00		Nurse 1	Nurse 2
Headquarters	Demo Room	Recovery Center	fentaNYL 2 mL	Bin 1	1/7/2020 2:42 PM	Countback	8.00	ml	8.00		Nurse 2	
Headquarters	Demo Room	Recovery Center	Morphine	Bin 1	1/7/2020 2:42 PM	Countback	25.00	ml	25.00		Nurse 2	
Headquarters	Demo Room	Recovery Center	Percocet	Bin 1	1/7/2020 2:42 PM	Countback	50.00	ml	50.00		Nurse 2	

6.4. Hierarchical Structure of Administration

Administration Menu

The Administration Menu can be accessed from the **Administration** icon on the top right corner of the screen. This icon also includes a drop down menu that allows access to the same features included in the administration menu. The Administration Menu looks as follows:
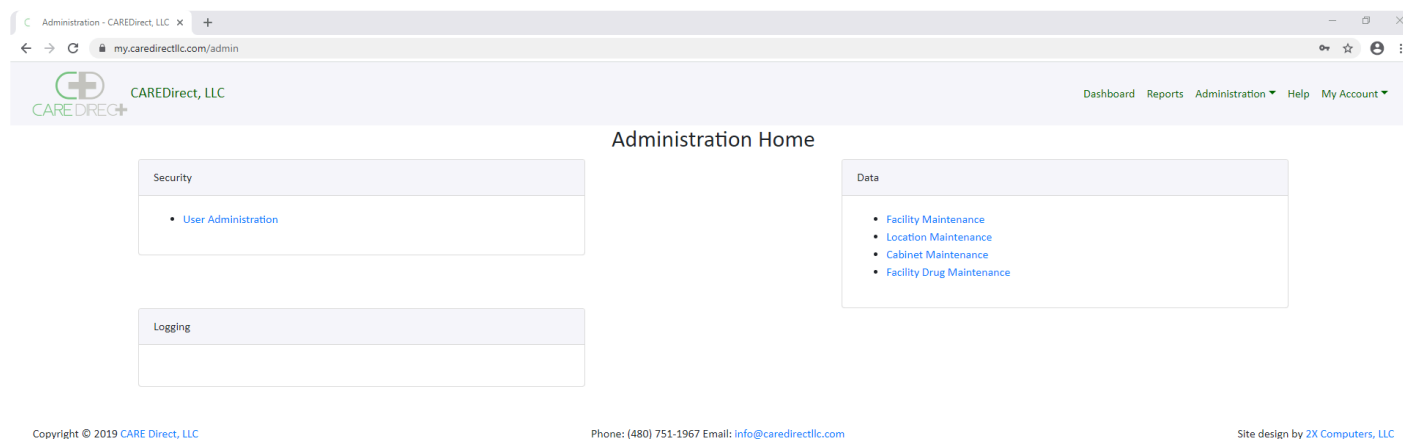
This menu provides the following options:

- User Administration
- Facility Maintenance
- Location Maintenance
- Cabinet Maintenance
- Facility Drug Maintenance

Hierarchy of Administration

The hierarchical structure in the cloud follows the order of (from top to bottom) **Company – Facility – Location – Cabinet**. This hierarchy follows an umbrella-type structure. This means that a company may have multiple facilities that fall under the company name or multiple locations within a facility.

Detailed Structure

Company

At the **company** level, all of the users can be managed. This means that when a user is added, they will appear across every facility, location, and cabinet. However, although users are managed at the **company** level, they are assigned access to specific cabinets at the location level.

Facility

All drugs are assigned and managed at the **Facility** level of the hierarchy. This means that if a company has multiple facilities, the **Facility Drugs** may differ between facilities. Additionally, any location within a facility (if there are multiple), will have the same assortment of drugs that may be added to a cabinet within that location.

Location

Although users are created at the **Company** level, they are assigned access privileges at the **location** level. This means that users within a company **must** be assigned to specific locations in order to have access to any cabinets. Additionally, once a user is assigned to a location, they will be given access to any of the cabinets within that location.

Cabinet

The cabinet level of the hierarchy consists of individual cabinets. At the cabinet level, facility drugs may be assigned to specific bins (from the cabinet itself) within a cabinet and the firmware can be updated. However, it is recommended that all cabinets be updated with the latest firmware version available at all times. Users may also be assigned to cabinets at the **cabinet** level.

> ✳ Note that when a user is assigned to a cabinet at the **cabinet** level, they will also be able to access any cabinet under the same **location** as the cabinet in which they were assigned. Therefore, to restrict a user to only certain cabinets, this must be done at the location level.

6.5. User Administration

This option can be accessed from the Administration Home by Selecting the **User Administration** icon on the left side of the screen under Security.
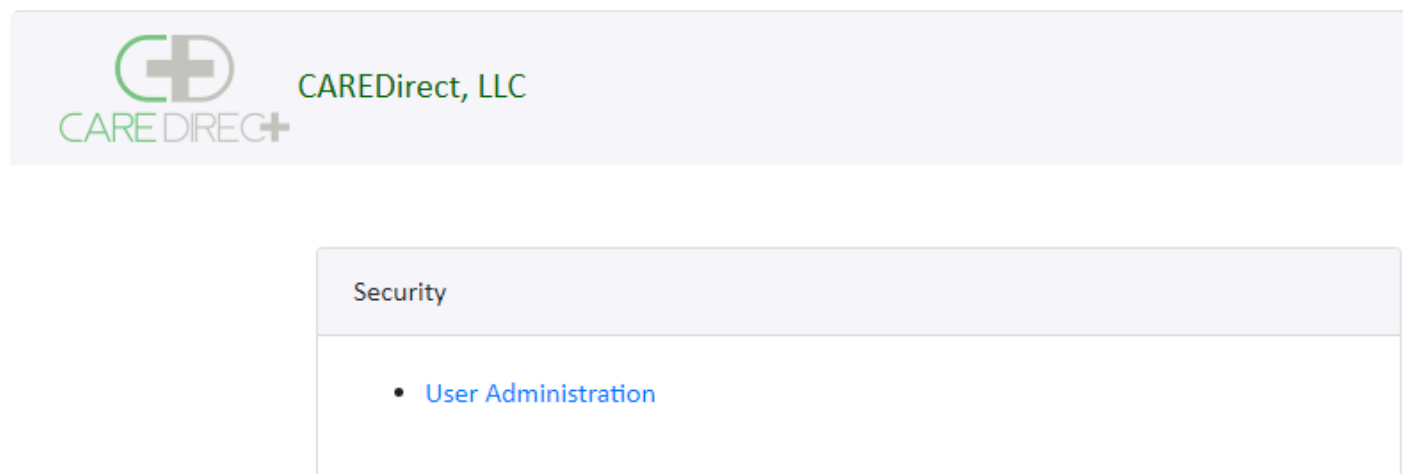
This option allows users to manage the cabinets users from the online portal. Many of the functions are similar to managing users from the cabinet (See **Manage Users**, Section 4) , but there are a few notable differences.

After clicking on the icon, the User Administration menu will appear. This menu looks as follows:

User Administration

☐ Include Not Active

Username	First Name	Last Name	Badge Number	User Type	
6789@ba5df442-3efe-4afb-b590-cfb81c9c4119	assistant	abcd		Cabinet - Assistant	
33221@ba5df442-3efe-4afb-b590-cfb81c9c4119	assistant	#2		Cabinet - Assistant	
3@ba5df442-3efe-4afb-b590-cfb81c9c4119	Bugs	Bunny		Company Administrator	
FactoryDeviceAdmin@caredirectllc.com	CAREDirect	Factory Admin	1000000	Cabinet - Admin	
3313@ba5df442-3efe-4afb-b590-cfb81c9c4119	DEF	LMN		Cabinet - Manager	
1BE3040000000000Z@ba5df442-3efe-4afb-b590-cfb81c9c4119	Demo	Admin		Cabinet - Admin	
1AE3040000000000Z@ba5df442-3efe-4afb-b590-cfb81c9c4119	Demo	Nurse		Cabinet - Nurse	
heinen@mpe-inc.com	Firstie	McLastie		Company Administrator	
E311120000000000Z@ba5df442-3efe-4afb-b590-cfb81c9c4119	g	g		Cabinet - Admin	
769984863@ba5df442-3efe-4afb-b590-cfb81c9c4119	Gary67	Gold		Cabinet - Nurse	
999984863@ba5df442-3efe-4afb-b590-cfb81c9c4119	Gary99	Gold		Cabinet - Nurse	

This menu allows Administrators to Add, Delete, Edit, and Reset the cabinet's users passwords.

Adding Users

To add users from the online portal, select the blue "+" icon on the bottom right part of the screen.

This icon will bring up a similar screen to the one that appears when adding users from the cabinet.

Adding user

Username:	Username

First Name:	First name	Last Name:	Last name
Badge #:	Badge number	Pin Code:	Pin code
Expire On:	mm/dd/yyyy	Pin Code 2:	Pin code 2
User Type:	▼		
Language:	(System Default) ▼		

Cancel   Save

To complete the process, fill out the required fields and click on the **Save** icon. The User will now appear on the cloud portal for the system.
Note: It make take up to 10 minutes for the user profile to update on the cabinet from the cloud.

Editing Users

In the rightmost column in the **User Administration** menu, there are a few icons that ca be used to access other User Administration functions. To edit users, select the blue edit icon in the same row as the user that is to be edited.

This icon will bring up a nearly identical screen to the one that appears when adding a user.

Editing user

Username:	123@ba5df442-3efe-4afb-b590-cfb81c9c4119		
First Name:	Sherlock	Last Name:	Holmes
Badge #:	Badge number	Pin Code:	123
Expire On:	mm/dd/yyyy	Pin Code 2:	111
User Type:	Company Administrator ▼		
Language:	▼		

Reset User Password:

Password:	Password	Confirm:	Confirm Password

Cancel Save

Deleting Users

To delete users, select the red delete icon in the same row as the user that is getting deleted.

After selecting this icon for the desired user, the system will prompt the current user to confirm if they would like to delete the selected user. To confirm, select yes and the user will be deleted. Note that the user will never be fully deleted from the system and will instead appear as a **Non-Active** user. This is done for the sake of record keeping for the cabinet.

User Management

Are you sure you want to delete user 6789@ba5df442-3efe-4afb-b590-cfb81c9c4119?

Cancel Yes

To view deleted/inactive users, select the check box in the top left corner that says **Include Not Active**. When this box is checked, all inactivated users will appear on the list with a strike through line across it.

☑ Include Not Active

6.6. Facility Maintenance

This menu can be accessed by selecting the **Facility Maintenance** icon from the **Administration** menu. Upon doing so, a screen like the following will appear.

Facility Administration	
Name	
Headquarters	✎ 🗑

This screen will provide a list of all of the facilities within a company. Additionally, there will be options to add, delete, and edit facilities.

Adding Facilities

> ✳ It is only recommended that facilities be added if multiple formularies exist for a company. If there is only one formulary for all of the cabinets within a company, **One** facility should be used.

To add a facility, select the **+** icon on the bottom right part of the screen within the **Facility Administration** menu.

Once this is selected, the following screen will appear:

Adding facility

Company: [▼]

Name: [Name   ]

[Cancel] [Save]

Once this screen appears, use the drop down menu to select the company name and enter a custom name for the facility in the **Name** field. Press the **save** icon and the new facility will be created.

> **!** Remember that a new formulary will have to be created for this new facility within the Facility Drugs menu.

Editing Facilities

To edit a facility, select the blue **edit** icon in the same row as the desired facility to edit.
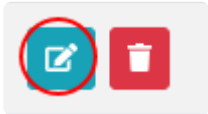
The only field that can be edited for a facility within this menu is the **Facility Name**. Facility drugs can be edited from the Facility Drugs menu.

Deleting Facilities

> **!** It is **Strongly** recommended that facilities that have associated cabinets are **NOT** deleted. If a facility with associated cabinets has to be deleted, please contact CAREDirect.

6.7. Facility Drug Maintenance

This section allows an administrator to control the drugs that can be entered into the cabinet. To access this section, click on the **Facility Drug Maintenance** icon in the **Administration Home**. Once this page is accessed, a screen displaying all of the drugs in the system appears.

Facility Drug Administration

Facility	Nickname	Base UOM	Ingredients	Strength	Require Countback	Double Lock		
Headquarters	Dilaudid	ml	HYDROmorphone hydrochloride	2 mg/mL	false	true	✏	🗑
Headquarters	fentaNYL 2 mL	ml	fentaNYL citrate	50 ug/mL	true	true	✏	🗑
Headquarters	fentaNYL 5 mL	vial	fentaNYL citrate	50 ug/mL	true	true	✏	🗑
Headquarters	ibuprofen	tb	ibuprofen	400 mg/1	false	false	✏	🗑
Headquarters	midazolam 2mg/2ml	vial	midazolam hydrochloride	1 mg/mL	true	true	✏	🗑
Headquarters	midazolam 5mg/5ml	vial	midazolam hydrochloride	1 mg/mL	true	true	✏	🗑
Headquarters	Morphine	ml	morphine sulfate	10 mg/mL	true	true	✏	🗑
Headquarters	Norco	tb	acetaminophen HYDROcodone bitartrate	325 mg/1 5 mg/1	true	true	✏	🗑
Headquarters	Oxycontin	tb	oxyCODONE hydrochloride	100 mg/5mL	true	true	✏	🗑
Headquarters	Percocet	tb	acetaminophen oxyCODONE hydrochloride	325 mg/1 5 mg/1	true	true	✏	🗑
Headquarters	Propofol	vial	propofol	10 mg/mL	false	false	✏	🗑

From this menu, the user is able to:

- Add Drugs to the system
- Delete drugs currently in the system
- Edit Drugs that are currently in the system

Adding Drug to the System

To add drugs to the system, locate and click on the small, blue **+** logo on the bottom right portion of the screen

Upon clicking on this logo, the following screen will appear

Adding facility drug

Facility: [▼]

Item: [   ]

Strength:

Route:

Nickname: [Nickname]

Base UOM: [(No Override) ▼]   Require Countback: [(No Override) ▼]

Double Lock: [(No Override) ▼]

[Cancel] [Save]

The **Facility** for which the drug is being added to can be selected via drop down menu. This option only matters if there are multiple facilities as the drug will only be available to cabinets within the selected facility (see Hierarchical Structure).

> ❗ If there are multiple facilities, be sure that the correct one is selected.

The **Item** blank requires input of the official drug name or NDC number (see Searching for Items When Adding a Drug for more information).

After the **Item** is entered, the **strength** and **route** blanks will populate based on the **item** entered

The **nickname**, **Base UOM**, **Double Lock**, and **Require Countback** can all be manually selected by the user depending on the drug being entered.

When finished entering all of the necessary information, click on the **save** icon and the drug will be entered into the system for the selected facility.
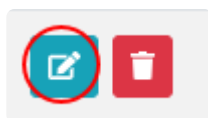
Deleting Drugs from the System

To delete drugs from the system, first locate the row or the drug in which is to be deleted. In the final column of this row, there are two logos that can be clicked on. When deleting a drug, click on the corresponding **Red Trash Can** logo.
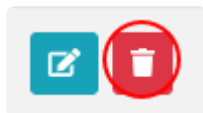
Clicking on this logo will bring up another screen asking for a conformation that the selected drug is to be deleted. If so, confirm this and the drug will be deleted from the system. If this logo was clicked on by mistake, or the wrong drug was selected, press cancel and the drug will not be deleted.

Editing Drugs within the System

To edit drugs within the system, select the blue **edit** icon next to the delete logo for the desired drug.

Clicking on this logo will bring up a similar screen to the one used when adding a drug.

The difference between adding and editing drugs is that only the **Nickname**, **Base UOM**, **Require Countback**, and **Double Lock** options can be edited. Everything else related to the drug cannot be altered with this feature.

6.7.1. Searching for Items When Adding a Drug

When adding a facility drug to the system, the **Item** blank can be filled out in multiple ways. The cloud portal is linked to the FDA's database that includes any drug that is part of this database. The item being added can be searched by NDC number of by name.

Searching by NDC number

If the NDC number of the drug being entered is known, this is the preferred method for searching. Note that only the first two segments of the NDC number need to be entered in order to find the desired drug. Once the desired NDC number is found, select that option and it will populate the blank with it.

Searching by Name

When searching for a drug by name, it should be noted that the only drug names that will appear will be drugs that have been previously entered into the system across any of the currently existing systems. This means that the drug name may not appear when searching by name if it has not been entered into a different facility yet. If the desired drug does not appear, try searching the drug by NDC number instead as this will search through the entire FDA database. Additionally, when searching a drug by name, make sure that the correct strength and route are selected.

Custom Items

Some facilities may need to add drugs that are not part of the FDA database. To do this, enter **Custom Item** into the **Item** blank and use the **Nickname** blank to name the item entered.

6.8. Location Maintenance

This menu can be accessed by selecting the **Location Maintenance** icon from the **Administration** menu. Upon doing so, a screen like the following will appear.

Location Administration

Facility	Name	Building	Floor	Area	
Headquarters	Demo Room	Main	1st	ESD	
Headquarters	MPE	Headquarters	1st	Front Office	

This menu allows the user to add, edit, and delete locations.

Adding Locations

To add a location, select the **+** icon on the bottom right part of the screen within the **Location Administration** menu.

Once this is selected, the following screen will appear:

Adding location

Facility:

Name: 　 Name

Building: 　 Building

Floor: 　 Floor

Area: 　 Area

Users

Username 　 Name 　 Type

Add User Assignment

Cancel 　 Save

To complete the **Facility:** field, use the drop down menu to select from one of the already-created facilities. The rest of the fields **(Name, Building, Floor, and Area)** can be populated with custom entries. These entries are used to distinguish locations and can be customized by the company to make distinguishing locations as easy as possible.

The bottom field is used to add users to the location from the **company level** list of users. To add a user, find the desired name from the drop down menu and press the **Add User Assignment** icon. The drop down menu includes the name of every user that has been created within the company. If a user is not assigned to the location, they will not be able to access any cabinet within that location. For more information on managing users within the cloud, see User Administration.

✳ **All** users added to the list will have access to every cabinet associated with the specific location.

Once all of the fields are populated, press the **save** icon to create the location.

Editing Locations

To edit a location, select the blue **edit** icon in the same row as the desired location to edit.

Once selected, the following menu will appear for that location:

Editing location

Facility:	Headquarters
Name:	Demo Room
Building:	Main
Floor:	1st
Area:	ESD

Users

Username	Name	Type	
6789@ba5df442-3efe-4afb-b590-cfb81c9c4119	assistant abcd	Cabinet - Assistant	🗑
3@ba5df442-3efe-4afb-b590-cfb81c9c4119	Bugs Bunny	Company Administrator	🗑
FactoryDeviceAdmin@caredirectllc.com	CAREDirect Factory Admin	Cabinet - Admin	🗑
3313@ba5df442-3efe-4afb-b590-cfb81c9c4119	DEF LMN	Cabinet - Manager	🗑
2356@ba5df442-3efe-4afb-b590-cfb81c9c4119	joe l	Cabinet - Assistant	🗑
2170@ba5df442-3efe-4afb-b590-cfb81c9c4119	Jon Snow	Cabinet - Nurse	🗑
12345@ba5df442-3efe-4afb-b590-cfb81c9c4119	n s	Cabinet - Nurse	🗑
123@ba5df442-3efe-4afb-b590-cfb81c9c4119	Sherlock Holmes	Company Administrator	🗑
8090@ba5df442-3efe-4afb-b590-cfb81c9c4119	steve j	Cabinet - Assistant	🗑

[▼] **Add User Assignment**

Cancel   **Save**

From this menu, any of the custom names used to distinguish the location can be edited. Additionally, the users who can access the location can be edited. This includes adding and deleting users from a particular

location. To add users, use the same process outlined above in **Adding Locations**. To delete a user, click on the red **trash can** icon next to the name of the user who is being deleted.

> ✳ Reminder that removing the user from a location will not completely delete them, but will instead **disable** the user from that particular location.

Deleting Locations

> ❗ It is **Strongly** recommended that locations that have associated cabinets are **NOT** deleted. If a location with associated cabinets has to be deleted, please contact CAREDirect.

6.9. Cabinet Maintenance

This menu can be accessed by selecting the **Cabinet Maintenance** icon from the **Administration** menu. Upon doing so, a screen like the following will appear.

Cabinet Administration

☐ Include Not Active

Name	Location	Building	Floor	Area	Version				
Device B827EB07412E	MPE	Headquarters	1st	Front Office	0	✏️	🗑️	℞	📱
Device B827EB228B7C	Demo Room	Main	1st	ESD	1357	✏️	🗑️	℞	📱
Device B827EB52C023	Demo Room	Main	1st	ESD	0	✏️	🗑️	℞	📱
Device B827EBCB64DB	Demo Room	Main	1st	ESD	1387	✏️	🗑️	℞	
Device B827EBF432CF	Demo Room	Main	1st	ESD	0	✏️	🗑️	℞	📱

Adding Cabinets

Adding cabinets to the system is **Not** done from this menu. Instead, when a cabinet is registered to the cloud from the cabinet itself, it appears on the **Cabinet Administration** page. Refer to Registering a Cabinet with the Cloud for more information.

Editing Cabinets

To edit a cabinet, select the blue **edit** icon in the same row as the cabinet that is to be edited.

Once this is selected, the following menu will appear:

Editing cabinet

Username:	B827EBCB64DB

MAC:	B827EBCB64DB	Serial #:	Serial Number

Name:	Recovery Center
Location:	Demo Room (Building: Main, Floor: 1st, Area: ESD) ▼
Status:	Active ▼

Bins

Title	Name	Type
Supply Bin	Supply Bin	Supplies ▼
Bin 1	Bin 1	Normal Meds ▼
Bin 2	Bin 2	Normal Meds ▼
Bin 3	Bin 3	Normal Meds ▼
Bin 4	Bin 4	Normal Meds ▼
Bin 5	Bin 5	Normal Meds ▼
Bin 6	Bin 6	Normal Meds ▼
Accessory Cabinet	Accessory Cabinet	Normal Meds ▼

Location Users

Username	Name	Type	
6789@ba5df442-3efe-4afb-b590-cfb81c9c4119	assistant abcd	Cabinet - Assistant	🗑
3@ba5df442-3efe-4afb-b590-cfb81c9c4119	Bugs Bunny	Company Administrator	🗑
FactoryDeviceAdmin@caredirectllc.com	CAREDirect Factory Admin	Cabinet - Admin	🗑
2356@ba5df442-3efe-4afb-b590-cfb81c9c4119	joe l	Cabinet - Assistant	🗑
2170@ba5df442-3efe-4afb-b590-cfb81c9c4119	Jon Snow	Cabinet - Nurse	🗑
12345@ba5df442-3efe-4afb-b590-cfb81c9c4119	n s	Cabinet - Nurse	🗑

The top portion of the menu, labeled **Editing Cabinet** allows the user to edit the cabinet **name, location, and status**. The name can be customized with any name that the user desires. The location and status of the cabinet can be chosen from a drop down menu list.

The part of this menu labeled **bins** allows the user to customize the names of all of the bins and the type of materials/medications stored in each bin. The bin name can be customized for each bin with any entry and the type of contents is chosen from a drop down menu.

The last portion of this menu, labeled **Location Users** provides the same list that is found when editing a location in the previous section (Location Maintenance. This menu is edited the same way as described in that section.

> **!** Note: editing users from the **Cabinet Administration** menu will still edit the users for the entire **Location** and not just the specific cabinet that is being revised. To prevent users from accessing a specific cabinet within a **Location**, a new **Location** must be created.

Deleting Cabinets

> **!** It is **Strongly** recommended that cabinets are **NOT** deleted. If a cabinet has to be deleted, please contact CAREDirect.

Viewing Cabinet Contents

To view the contents of a cabinet, select the yellow **Rx** icon in the rightmost column

This icon will bring up a menu that shows the contents within each bin of the cabinet, including the drug nickname, amount present, and base unit of measure.

Editing Drug <-> Bin Assignment

Supply Bin - Supplies		
Bin 1 - Normal Meds		
fentaNYL 2 mL	11	ml
ibuprofen	396	tb
Morphine	20	ml
Percocet	40	tb
Propofol	120	vial
Bin 2 - Normal Meds		
ibuprofen	123	tb
Bin 3 - Normal Meds		
fentaNYL 5 mL	5	vial
Bin 4 - Normal Meds		
Percocet	12	tb
Bin 5 - Normal Meds		
Bin 6 - Normal Meds		
Accessory Cabinet - Normal Meds		

Cancel   Save

✳ Note: This menu is for informational purposes only and cannot be edited. To edit the contents of a bin within the cabinet, a user must login to that specific cabinet and complete this from the cabinet itself (see Bin Configuration).

Cabinet needs a Firmware Update

When a cabinet does not have the latest Firmware version installed, a fourth icon will appear in the rightmost column indicating this. The icon looks as follows:

If the cabinet has the latest firmware, this will not appear. To update the firmware, see Firmware Update.

✱ It is strongly recommended that when this icon appears that the firmware is updated immediately. The current firmware version also appears in the column to the left of this one.

6.9.1. Identifying Cabinets

Identifying cabinets is done via MAC addresses.

Finding MAC Addressees on the Cabinet

The MAC address for a cabinet can be found be found on the cabinet itself. To do this, first select the settings icon on the top, middle portion of the Main User Screen. For more information on this, see Settings Menu. Next, select the IT Settings icon. After this is selected, select the Network Settings icon. Once this is opened, go to the **information** icon on the top right portion of the screen.
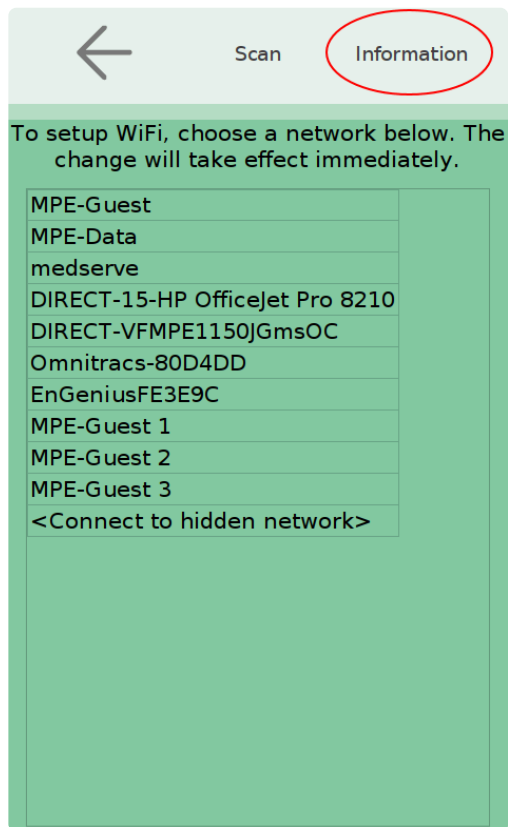
By selecting this, a screen will appear with the MAC address and other information. The MAC address can be found at the top of this screen under the **MAC Address:** header. This address can be used to match the cabinet on the cloud portal. Be sure to use the **eth0** MAC address.

MAC addresses:
B8:27:EB:CB:64:DB (eth0)
B8:27:EB:9E:31:8E (wlan0)

Network addresses: (wlan0)
192.168.240.126
fe80::f7ec:f2c8:d13b:120d

Connected to:
MPE-Data
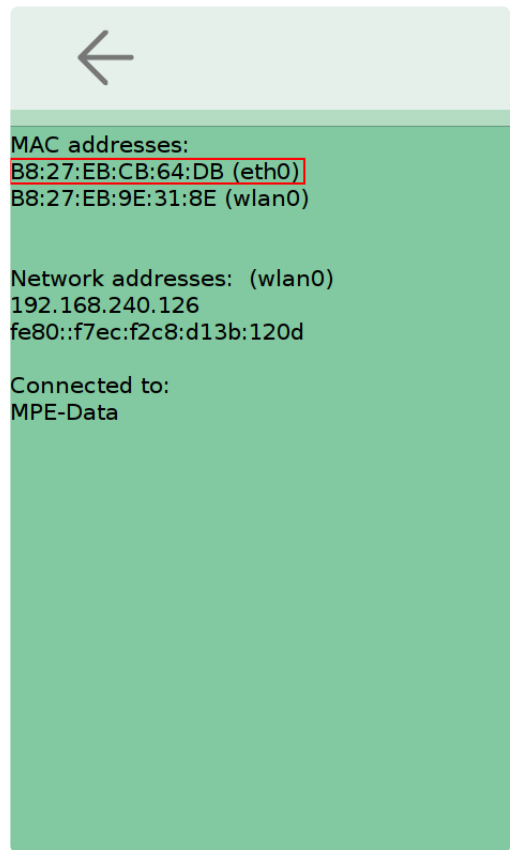
Matching the Cabinet on the Cloud Portal

Once the MAC address on the cabinet has been identified, this can be matched with the MAC address presented on the cloud portal. Under the **Cabinet Administration** menu, is a list of all of the associated cabinets with a company. The leftmost column on this list states each cabinet's name.

Name
Device B827EB07412E
Device B827EB52C023
Device B827EBCB64DB
Device B827EBF432CF

By default, these names will be the MAC address for the cabinet. To identify a specific cabinet on the cloud, simply match the MAC address found on the cabinet itself with the MAC address listed in this column.

7. Accessories

The following section provides some details on using the accessories for the medserve cabinet.

7.1. Double Locking Gray Bins (Controlled Substance Bins)

Description

Controlled Substance Bins (gray bins) are an optional accessory and can replace general purpose (white) bins in a cabinet or cassette. These bins are gray in color and can be locked by the keyed lock in the cassette. A cabinet or cassette can be filled with 0-6 controlled substance bins.

Purpose

When used in the cabinet, the controlled substance bins are locked by the electronic locks in the cabinet, similarly to the standard white bins. However, the keyed lock on the cassette provides a secondary lock for the controlled substance bins. The general purpose (white) bins are not affected by the keyed cassette lock. Therefore, the controlled substance bins can be double locked while the general purpose bins will have a single lock inside the cabinet.

When a cassette is removed from the cabinet, the keyed cassette lock serves as the primary lock for controlled substance bins. The general purpose bins are not locked when the cassette is removed from the cabinet (see "Using the Keyed Cassette Lock", Section 5.1.5)

8. Maintenance and Troubleshooting

The following information details some options for troubleshooting when common problems with the system occur. Additionally, information regarding cabinet maintenance and cleaning is provided.

8.1. Using the Keyed Cassette Lock

Unlocking/Disengaging

The keyed lock at the top of the cassette actuates the mechanical locks for the controlled substance bins. It will lock controlled substance bins wherever they are located in the cassette. The lock is disengaged when the keyed slot is horizontal (i.e. not aligned with the lock icon).


Locking/Engaging

To lock the controlled substance bins in the cassette, use the supplied key to turn the lock vertically (i.e. aligned with the lock icon). The key can be removed from the lock when finished.

8.2. Device will not Power On

If it appears that the cabinet does not have power, try the following remedies:

- Press anywhere on the touchscreen to ensure that the cabinet is not powered. The display on the cabinet automatically turns off after a period of disuse. Touching the screen will restore the display.
- Check that the main power switch is set to the on position (the position marked "I"). The power switch is located inside the supply area. Access it by manually opening the supply door (see Mechanical Overrides).
- Ensure that the provided AC adapter is plugged into a powered wall outlet and into the power dongle on the cabinet as described in the installation instructions (see Other Manuals).
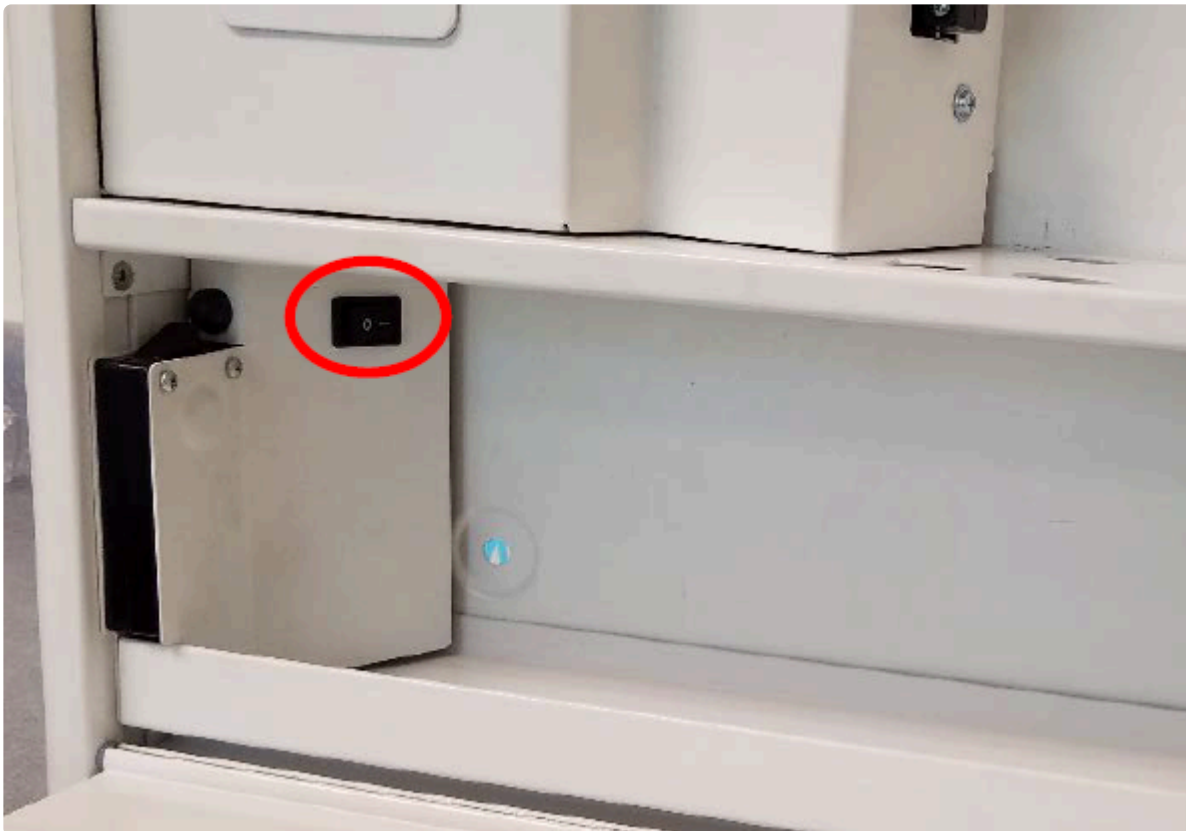
8.3. Bins will not Lock

If the bins will not lock, the mechanical override for the bins may be engaged. Ensure that the mechanical override for bins is disengaged (see "Mechanical Overrides", Section 5.1).

8.4. Bins will not Remove from Cassette

The cassette contains a mechanism to prevent the bins from opening unintentionally during transport. This mechanism is disengaged when the cassette is placed in the cabinet or on a flat surface (like a table or work surface). Place the cassette firmly on a flat surface and try opening the bins again.

8.5. Cabinet does not Display Correct Time

If the cabinet does not display the correct date or time, it may not have a network connection or the wrong time zone is selected. Ensure the cabinet has a network connection (see Network Settings) and that the correct time zone is selected. Alternatively, the time may be set manually (see Date and Time Settings).

8.6. Cleaning and Maintenance

Please follow the cleaning procedures provided below. These instructions are provided as a service. No warranty is implied since results may vary.

General Cleaning

Ordinary dirt, smudges and water soluble stains can be removed with mild soap and water. If needed for difficult stains, clean by using commonly used, diluted, non-abrasive solutions such as quaternary ammonia compounds, ammonia enzyme cleaners, bleach, or alcohol solutions.

Cleaning the Bins

The plastic bins may be cleaned in a dishwasher. However, they are **NOT** safe for use in an autoclave.

Touchscreen

Do **NOT** use liquid spray or other liquids to clean the touchscreen. Liquids may damage the touchscreen and other electronics inside the cabinet.