**General:**

* Overview of what AS is, what inventory management is, and importance of it
* Dropdown menu by clicking on the AccuShelf name
	+ Provides serial number, support contact, and internet connection
	+ Restart and power button found in bottom left-hand corner
		- Restarts the AccuShelf application. Can take 5-10 mins to come back up

**Users:**

* Select “Add User”
* Enter the user’s information
* Capture fingerprint by selecting “Fingerprint Login” and accepting Confidentiality Form
	+ Captured four separate times by lifting and replacing
* Select level of access
	+ Administrator
		- Confirm their email is correct for alerts and portal access
	+ Loading Clinician
	+ Keep both unselected if Clinician
* Ability to add existing user from other health centers
	+ Select “Add User” button
	+ “Grant Access” to existing user
	+ Select on the user’s name by manually selecting or searching

**Load:**

* Describe how to receive without an invoice and select the correct Program
	+ Continuing with an invoice is for 340B
* Describe and show example of 1D vs. 2D barcodes
* Show how to scan in a box of vaccines/medications using 2D barcode
	+ 2D captures the Lot/Exp for all vaccines and most medications
		- Cover other barcodes to ensure a correct scan
	+ Vaccines have the 2D as another option for scanning
* Ability to capture multiple boxes at a time if they are in the same Program
	+ Remove an item from the list by selecting the box to the left of the item
	+ Using the dropdown menu in the bottom left of the screen, select “Remove Items”
	+ Use the “Select” button and confirm the removal of items
* Select item row to view the item detail card
	+ Ensure to change quantity and unit of measure when loading partial bottles and boxes
	+ Enter correct Lot/Exp when not captured by the barcode
		- Red exclamation mark will show up on the row
* If item does not have a barcode, Custom Barcodes can be found on the AccuSite Knowledge Base
* If an item is not recognized, AccuShelf will walk the user through steps to create the item
* Items can be selected manually using the “Select Item Manually” button on the screen
	+ Use the search bar or “Lookup” features to find the item

**Dispense:**

*Inventory Mode-without patient names added to the unit*

* Select “Dispense” and scan the items
	+ If the item is in multiple programs, select the correct one when prompted
* Confirm the chosen items to be dispensed

*Patient Mode-patient names added to the unit, medication history will be available*

* Describe the different ways of searching patients
	+ Name & MRN through search box
	+ DOB by selecting the calendar icon next to search box
* Select the patient from the patient list
	+ Ability to manually add the patient if they are not yet added
	+ Choose the correct Program if it is in multiple inventories
* Scan the items
* Confirm chosen items

*Order Mode-vaccines will be grouped together and will be dispensed at the same time an order is selected*

* Select the correct order/patient
	+ Order contains pt. full name, MRN, DOB, list of ordered vaccines, & vaccine status
		- √= vaccine is in stock
		- X= vaccine is out of stock
		- ?= unknown if vaccine is in or out of stock
		- Cancel button allows users to cancel an open order
	+ Not ALL EHR systems will send program info, if not listed, user will have to manually select the program once the order is selected
* Scan the items to be dispensed
	+ If a product is out of stock, the vaccine card will not be highlighted
* Confirm chosen items

*General information for all modes*

* Dependent on 2-way EMR integration, NDC and Lot/Exp (for vaccines and medications) will go over to the EMR for patient. Ensure they understand if something is removed without a patient, the information will not go over. Please check with your EMR vendor if unsure
* If the item does not have a barcode, manually search by “Show Full Inventory”
* 340B requires Payor and Provider to be recorded (if enabled)
* A card containing a timer for return will appear for multi-dose vials

**Patient Safety Cautions: *for vaccines only and based on CDC guidelines***

* Select “review cautions” to address the warnings
* If user chooses to “override” the caution, a note must be entered
* User can choose to “not” dispense the vaccine
* Types of cautions: age, gender, too close, too many, duplicate, schedule, multiple

**Return:**

* Scan item to return
	+ Able to select the card and check manually as well
	+ Option to “Waste” for Single Dose
* Enter the amount being returned

**Multi-Dose Vials**

* Select the Timecard of the Multi-dose vial
	+ Able to “Waste” one dose, entire vial, and store drawn syringe
* After all counts are verified, return multi-dose vial
	+ Card will turn from green to yellow to red as the vial becomes closer to expiring
	+ The last dose administered of a multi-dose vial must still be returned

**Inventory:**

*View*

* Expired, expiring soon, recalled, and low inventory all tracked
	+ Categorizes by programs
	+ Viewable by selecting the program card
* To “Remove” inventory, select on the desired program, and item card(s). Then select “Remove”
* To view detailed item information, select the 3 dots on the upper left of the item card
	+ Shows NDC, Lot/Exp, units of use, etc.

*Reconcile*

* If the screen were to time out while reconciling inventory, the task can be continued through this tab

*Manage*

*Transfer*

* + To send an item to another site, select “Transfer”
	+ Enter the current sites name where “Site\_Transfer” is located
	+ Select the destination for transfer and scan the items to be sent
		- If found in multiple inventories, select the correct inventory
	+ Enter any transfer notes included and “Submit” the transfer

*Move*

* + Allows users to change the storage environment of Covid-19 and Monkeypox vaccines
	+ Scan the Covid vaccine
	+ Select where the vaccine will be stored
	+ Enter the quantity being moved
	+ Confirm the move by selecting “Next”

*Activity*

* All recent activity is tracked through the “Activity” section
* Shows what was dispensed, user, Lot/Exp., date, and timestamp

**Temperature:**

* Displayed on the main screen
* Displays green when in range and red when out of range
* Temperature will be captured twice a day if it is TM
	+ If not captured, it will be taken automatically
	+ Displays 24-hour Min. and Max.
	+ Displays Current temperature

**Good To Know:**

* If scanner does not work properly, unplug, and plug back in
* Remember to log out
	+ Unit will log then out automatically after 60 seconds of inactivity
* Reference the AccuShelf User Guide available on the AccuSite portal to troubleshoot user actions or for questions on the workflow