**General:**

* Overview of what AS, what inventory management is, and the importance of inventory tracking
* Dropdown menu by clicking on the AccuShelf name
	+ Provides Serial Number, Support contact, and internet/portal connection

**Dispense:**

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

* Select Dispense and scan the items
	+ If the item is in multiple inventories, 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
	+ Able 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 are 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 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