

## AccuShelf User Guide: Clinician

AccuShelf Inventory Management System allows users to capture every detail about products in seconds, from medication strength and appearance to expiration dates and unit quantities, all with a wireless barcode scanner. Users can see what is available in real-time and the system will send notifications of low and critical inventory levels. This means users can monitor inventory more easily. AccuShelf also provides patient safety checks to help with HEDIS immunization efforts, comply with ACIP or office vaccination schedules, and eliminate common vaccine/medication errors such as age verifications, too many of the same product, or the wrong product selected. By removing the need for redundant data entry, staff can focus more on patient care.

This user guide goes into detail on workflows, features, and capabilities; whether a new user or an experienced user looking to maximize the functionality of AccuShelf, we are here to help. Click on the topic you are interested in viewing to be navigated directly to that section.

### Table of Contents

<b>LOGIN.....</b>	<b>3</b>
PERMISSION AND ACCESS LEVELS .....	3
LOGGING IN .....	3
FINGERPRINT LOGIN.....	4
<b>HOME SCREEN .....</b>	<b>4</b>
<b>DISPENSE.....</b>	<b>4</b>
PATIENT MODE.....	5
<i>Select a Patient Screen .....</i>	<i>5</i>
<i>Scan items to Dispense Screen.....</i>	<i>5</i>
<i>Scan to Dispense.....</i>	<i>6</i>
<i>Select from Full Inventory.....</i>	<i>6</i>
ORDER MODE.....	7
<i>Select Order Screen.....</i>	<i>7</i>
<i>Open Orders.....</i>	<i>8</i>
<i>Out of Stock Orders.....</i>	<i>9</i>
<i>Partial Orders.....</i>	<i>9</i>
<i>No Program Orders.....</i>	<i>9</i>
<i>In Stock versus Out-of-Stock on Confirm Order Screen .....</i>	<i>11</i>
<b>EXPIRED AND RECALLED PRODUCT .....</b>	<b>11</b>
<b>PATIENT SAFETY CAUTIONS .....</b>	<b>12</b>
TYPES OF PATIENT SAFETY CAUTIONS.....	13
MULTIPLE CAUTIONS .....	15
ADDRESS CAUTIONS.....	15
OVERRIDE A CAUTION .....	16

<b>RETURN .....</b>	<b>16</b>
<b>RECONCILE.....</b>	<b>18</b>
CREATE AN AD HOC TASK (PLAN CYCLE COUNTS).....	18
PACKAGE VERSUS UNIT VIEW .....	19
RECONCILE SUMMARY REPORT .....	19
EXPRESS RECONCILE.....	20
<b>INVENTORY .....</b>	<b>22</b>
VIEW .....	23
ACTIVITY.....	24
<b>INFORMATION SCREEN .....</b>	<b>24</b>
<b>TEMPERATURE MONITORING WITH ACCUSHELF TM.....</b>	<b>25</b>
TEMPERATURE DISPLAY .....	25
TEMPERATURE ALERTS .....	25
LOW DIGITAL DATA LOGGER BATTERY.....	25
TEMPERATURE CONFIRMATIONS .....	26
TEMPERATURE INDICATOR .....	26
<b>TRANSFER.....</b>	<b>26</b>
WHAT IS A TRANSFER? .....	27
CREATE A TRANSFER .....	27
TRANSFER REPORT NOTES AND SUBMISSION .....	29
LOAD AND CLOSE A TRANSFER .....	29
<b>SAMPLE MANAGEMENT .....</b>	<b>29</b>
<b>340B WORKFLOW .....</b>	<b>30</b>
DISPENSE 340B MEDICATIONS.....	30
<i>Select a Provider/Payor .....</i>	<i>30</i>
<i>Add New Providers/Payers .....</i>	<i>31</i>
<b>COVID-19 VACCINE WORKFLOWS AND FEATURES .....</b>	<b>31</b>
DISPENSE COVID-19 VACCINES .....	32
MULTI-DOSE COVID-19 VACCINES .....	33
<i>Multi-Dose Timer .....</i>	<i>33</i>
RETURN COVID-19 MULTI-DOSE VIALS .....	34
MOVE COVID-19 VACCINES .....	35
<b>POWER ON AND OFF ACCUSHELF.....</b>	<b>36</b>

## Login

### Permission and Access Levels

AccuShelf offers three different levels of user permissions to ensure patient safety and security. The clinician level is as follows:

#### *Clinician:*

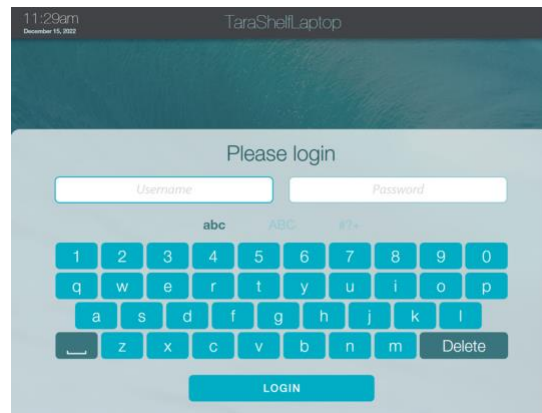
- *Dispense*- User can dispense inventory items to administer to a patient.
- *Return*- If a dispensed inventory item is refused by a patient, the user can return the item back into inventory for future use. Additionally, the user can “waste” a product if it is compromised.
- *Inventory*- The user can view what products are in inventory and what program the product is assigned to. The user can remove any inventory currently in the system.
- *Reconcile*- The user has the ability update inventory counts in the AccuShelf to match the true on-hand count.
- *Transfer*- When enabled, the user can authorize a transfer of inventory from their current site to another site in need of the product.
- *Move*- For COVID-19 vaccines only, the user can move vaccines stored in an ultra-low or regular freezer to the refrigerator or room temperature. This will update the BUD of the vials moved as well as the date of the first move.
- *Activity*- User can see all activity on the machine over the last 24 hours including the action, the program, date and time stamp, and the user.
- *Temperature*- For AccuShelf TM, the user can view 24-hour temperature data of different storage locations.

## Logging In

Users will not have access to AccuShelf unless they have a valid user profile (created by an Administrator) and correct login credentials. There are 2 ways that users can login to the AccuShelf: biometric fingerprint scan (explained below) and manual entry. How a user logs in is a matter of preference.

The biometric fingerprint scan can be used at any time. The user needs only to place their captured finger on the fingerprint scanner, and once confirmed they will be brought to the home screen.

A user can login manually by pressing the “Login Manually” button on the login screen. A slide-up keyboard will appear, allowing a user to enter their username and password. Once both fields are completed, the user can press the Login button to confirm credentials and access AccuShelf.

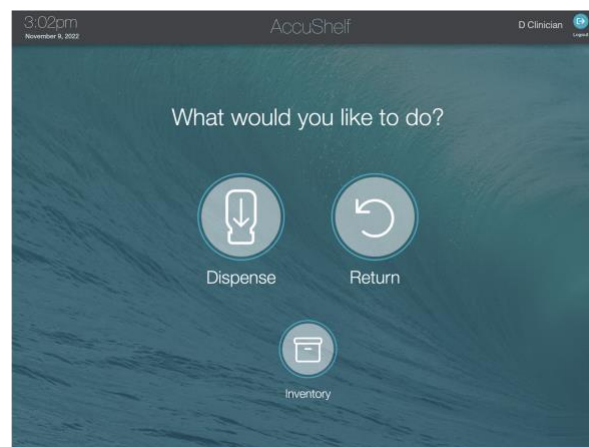


## Fingerprint Login

To capture a fingerprint, the user will have to place their finger on the scanner 4 times. Each time the user's fingerprint is captured, the AccuShelf will beep to confirm and move to the next capture. Once all 4 captures are completed and the profile saved, the user can login via fingerprint scan. Note: the same finger must be used for all 4 captures, otherwise the fingerprint will not save.

## Home Screen

The home screen is the first page that the user is brought to after logging in. On this screen users can navigate to different areas of AccuShelf. Users will be brought back to the home screen anytime they press the home icon button within a section.



## Dispense

The Dispense section is where users can select items for use and administration on patients. Users can select from a list of patients and dispense any item in inventory. AccuShelf has 2 dispense modes: patient, order/inventory (which also includes patients).

## Patient Mode

Patient mode allows users to associate patients with their dispenses. Users can therefore track which items were dispensed to each patient at any given time via the Activity Report, which in turn helps with audits and billing reconciliation.

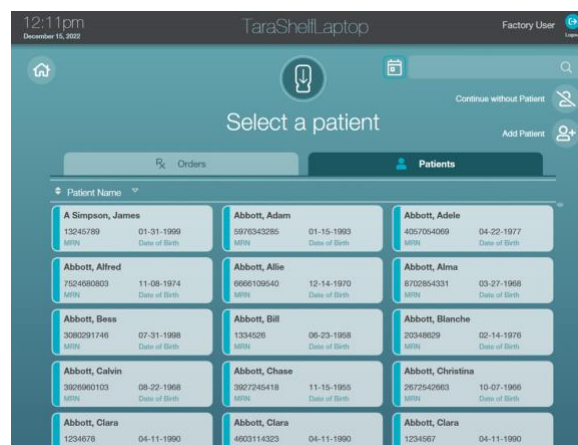
### *The Patient List*

The patient list is generated in 3 ways:

- **CSV Uploads:** Customers can sign into the AccuSite portal and upload their patient roster in CSV format. Upon subsequent uploads, our patient matching algorithm will add new or update existing records appropriately.
- **Add a Patient:** A user can add individual patients either via the AccuShelf or the AccuSite portal.
  - There are four fields required to create a patient: the patient's first name, last name, medical record number (MRN) and date of birth. Once saved, the new patient will be added to the unit's patient list.
- **HL7 ADT Feed:** Through TruMed Systems' Connect Health Cloud, customers can establish a direct HL7 ADT feed to automatically synchronize patient data from the EHR with their units.

### Select a Patient Screen

The first step in a patient mode dispense is to select a patient. The user will be brought to a screen with a table listing all available patients for dispense. Each patient card includes the patient's last name, first name, MRN, and date of birth. Users can scroll through the list to locate their patient for selection or use the search bar to query on name or MRN. If a patient is new to the practice, a user can add a new patient via the Add Patient button.



### Scan items to Dispense Screen

Once the user selects a patient, creates a patient, or selects the Continue without Patient button, they will be brought to the Scan items to Dispense screen. If the user selected a patient, the patient's information will appear on a card at the upper left portion of the screen.

Users have two ways to select items for dispense: scanning items or selecting items from the full inventory.

## Scan to Dispense

When scanning an item for dispense, AccuShelf will check the scan against inventory and one of the following results will occur:

- If the item is in stock and only has 1 program assigned, the item will be added to the dispense list.
- If the item is in stock but has inventory in multiple programs, a popup will appear asking the user to confirm a program.
- If an item has multiple lots and expirations in stock and the user does not scan the soonest to expire item, a notice will appear on the item's card alerting the user there is stock closer to expiry.
- If the user scans an item that is not in inventory, a prompt will appear onscreen asking if the user would like to load that item into inventory.
  - If the YES button is selected, the user will be walked through the Load workflow to capture that item in inventory.
  - Once the user finishes the Load transaction, they will automatically be brought back to where they left off, with the newly loaded item selected for dispense.

## Select from Full Inventory

Users can scan items to begin filling out the Show Selected Items Only view on the Scan Items to Dispense screen. If a manual option is preferred, the user can select Show Full Inventory from the filter drop down.

The full inventory screen shows every item in stock, displayed in a scrollable 3-column table. Each item card includes the brand name, strength, program, lot, expiration, image, form factor, form factor icon, and quantity. A user can view the item's details by pressing on the card.

Not every item in stock has a selectable card; instead, items are grouped in the following way:

- An item with the same lot and expiration and the same program will be grouped together.
- An item with different lots and expirations but the same program will be grouped together; the lot and expiration will be displayed as "Multiple".
- An item with the same lot and expiration but different programs will be split out.
- Expired items will not appear on the Show Full Inventory screen.



## Order Mode

AccuShelf can integrate with electronic health record (EHR) systems, creating a one-directional or bi-directional interface for patient orders.

### *One-Directional EHR Interface*

In a one-directional interface, users can create an order for the patient through the patient's chart in the EHR, and that order is sent directly to the AccuShelf.

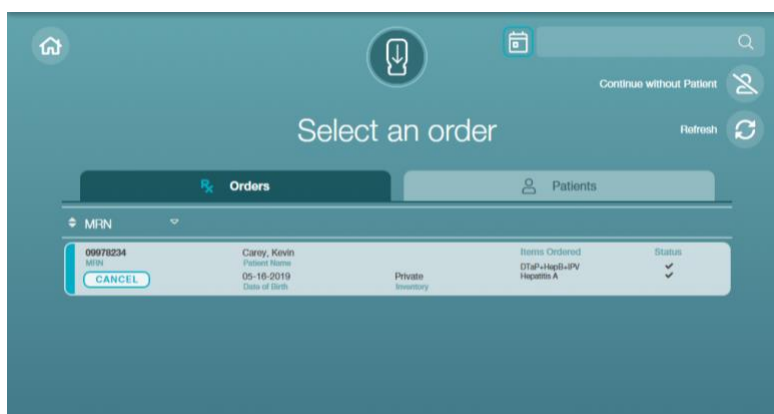
### *Bi-Directional EHR Interface*

Some EHR systems have the capability of creating a bi-directional interface with the AccuShelf system. A bi-directional interface has the same capability as a one-directional interface, but with the added capability to send vaccine and medication information back to the EHR system after the Dispense is complete. This information can include the vaccine NDC code, lot, and expiration.

## Select Order Screen

The Select Order screen lists the open orders available on the AccuShelf. Users can select the order from the list or search a longer list by entering the patient's first name, last name, or medical record number (MRN). Alternatively, they can select the calendar icon to search via date of birth.

In addition to selecting an order, users have the option of continuing without a patient by selecting the Continue without Patient button or dispensing via Patient Mode by selecting the Patients tab. The patients tab will present the user with a list of all patients, and they can proceed with the Patient Mode Dispense workflow as described above.



Orders are sent directly to the AccuShelf from the EHR, but if a recently placed order is not appearing in the Orders list, users can press the Refresh button to display the newest orders.

## Open Orders

Open orders will display as selectable rows. Included on the row are the following details:

- First Name
- Last Name
- MRN
- Date of birth
- Program
- List of the ordered vaccines
- Status: the vaccine's inventory status
  - Checkmark: the vaccine is in stock
  - X: the vaccine is out of stock
  - ?: unknown if the vaccine is in stock or out of stock
- Cancel button allows users to cancel an open order

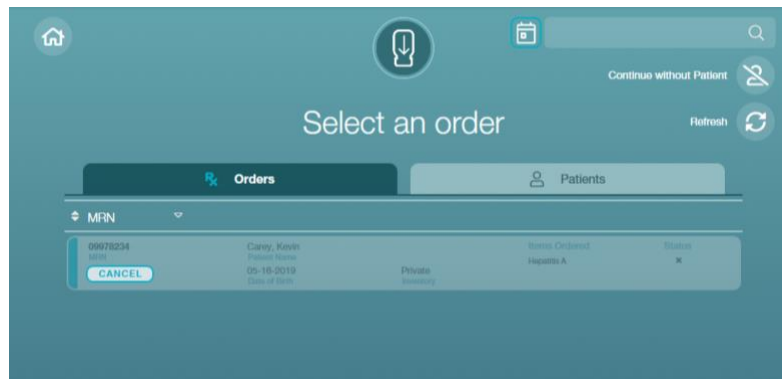
All vaccines ordered for a patient will be grouped together, and all will be dispensed at the same time once the order is selected.



09978234 MRN	Carey, Kevin Patient Name 05-16-2019 Date of Birth	Private Inventory	Items Ordered DTaP+HepB+IPV Hepatitis A	Status ✓ ✓
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## Out of Stock Orders

The open order will appear grey and cannot be selected if all vaccines on the order are out of stock. The order will be filled-in and selectable once the vaccine(s) on the order are loaded and back in stock on AccuShelf. The user can also press the Cancel button to cancel the order.



## Partial Orders

Partial orders are created when there are 2 or more vaccines in on order, with at least 1 vaccine in stock and 1 vaccine out of stock. The partial order can still be dispensed, but it will only dispense the in-stock vaccine(s). Once the dispense is completed, the order will remain on the Select Order screen as out-of-stock and no longer selectable. As described above, the user can Load the out-of-stock vaccine into the AccuShelf inventory and dispense the order or use the Cancel button to close the order.

## No Program Orders

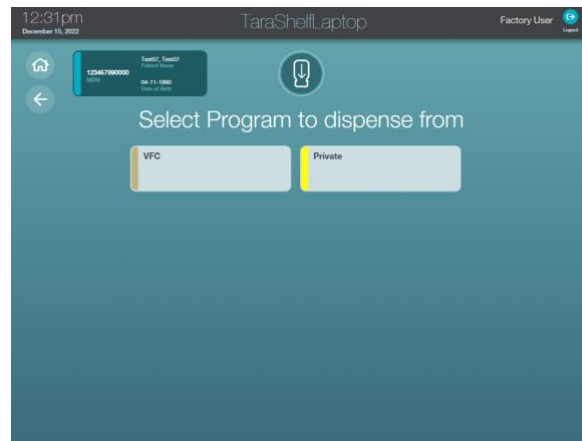
Some EHR systems do not send the program information with the order. In this scenario the order will appear differently on the Select Order screen:

- The Inventory will be listed as “Unassigned”.
- The status for each vaccine on the order will have a “?” icon (the user cannot determine stock status without a program).

123467890000 MRN	Test07, Test07 Patient Name 04-11-1990 Date of Birth	Unassigned Inventory	Items Ordered Influenza	Status ?
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## Select Program Screen

Users are prompted to select the order's program once the order is selected. The user is brought to the program selection screen, listing out all available programs. Select a program to move forward to the Confirm Doses screen.

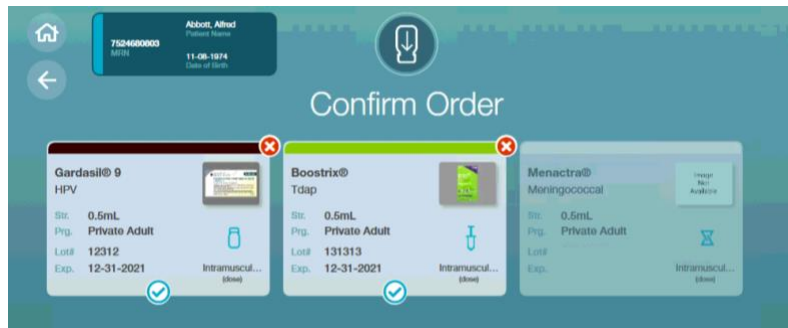


## *Confirm Order Screen*

The Confirm Order screen lists all vaccines on the order. The vaccine cards list the next to expire lot and expiration, amongst other vaccine details.

The user must confirm they have the correct vaccines prior to completing the dispense, and they can do so in 2 ways:

- Scan to confirm: The user can scan the vial/pre-filled syringe/package barcode that matches the lot and expiration listed on the vaccine card.
  - The user must scan the 2D barcode to check for the lot/expiration match.
  - A prompt will appear onscreen warning the user that they did not scan the next to expire vaccine if they select other than what is listed.
  - Once the scan is confirmed, the checkmark will be filled-in green.
  - If the barcode is damaged and cannot be read, the user can confirm the vaccine manually.
- Manual confirm: The user can press the checkmark at the bottom of the vaccine card to confirm the correct vaccine with the matching lot and expiration is in hand.
  - Once the user presses the checkmark it will be filled-in green.



## In Stock versus Out-of-Stock on Confirm Order Screen

### In stock vaccines:

- Appear filled-in.
- Are selectable.
- Can be confirmed via scan or manual selection.
- Can be removed from the Dispense (via the X button).

### Out-of-stock vaccines:

- Appear greyed-out.
- Are not selectable.
- Cannot be removed from the dispense or confirmed in any way.

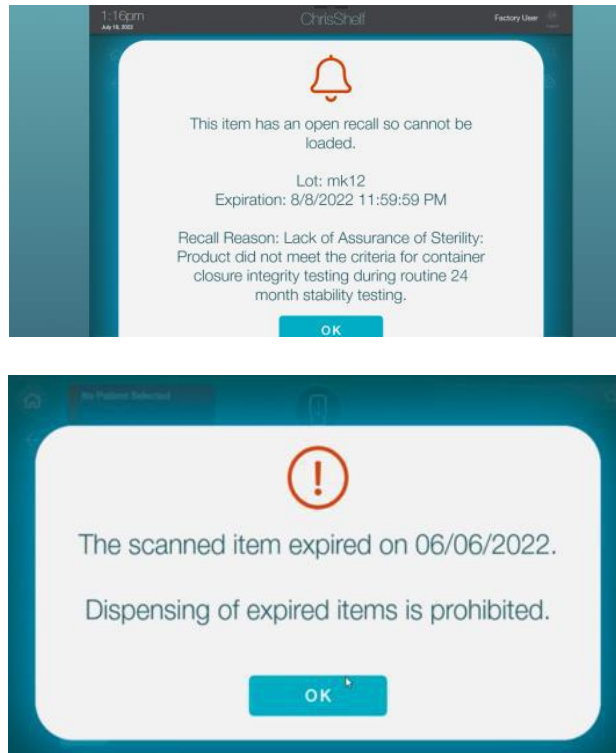
### *Adjust with the X Button*

Users can remove vaccines from being dispensed on the Confirm Doses screen by pressing the red X button in the upper right portion of the vaccine card. Pressing the red x will remove the vaccine card from the screen and it will not be dispensed to the patient.

Note: Pressing the x on the vaccine card will remove the vaccine from the Dispense list, but it will not remove it from the order. The order will remain open on the Select Order screen with the removed vaccine listed.

## Expired and Recalled Product

AccuShelf provides warnings of expired and recalled product within the system. AccuShelf will not allow loading or dispensing of recalled or expired products to increase patient safety.



When a product that has been previously loaded into AccuShelf expires or goes on recall, that product is quarantined in the system and cannot be dispensed. An Administrator will need to remove the expired or recalled inventory.

## Patient Safety Cautions

Patient Safety Alerts appear when one or more doses in a dispense may affect a patient's wellbeing based on guidance from the CDC and FDA. The selected product will be flagged if it conflicts with the patient's age, gender, or immunization history.

A red-colored badge will appear on the product card, notifying the user to the type of safety alert that was triggered. Users cannot dispense the product(s) until all patient safety cautions have been addressed.

Note: Patient Safety Alerts are based on patient history after the implementation of AccuShelf. Patient history prior to the use of AccuShelf will not be recognized by the system.



## Types of Patient Safety Cautions

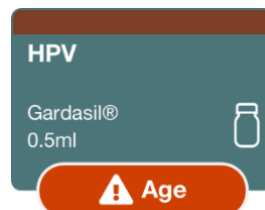
The following patient safety cautions will be checked against each product selected for Dispense:

- Age
- Gender
- Too Close
- Too Many
- Duplicate
- Schedule
- Multiple

### Age Cautions

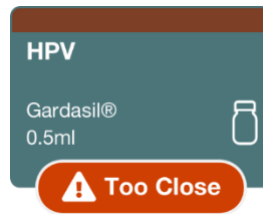
Age cautions appear when a patient's date of birth is out of the range with a product's licensed age guidelines. These types of age cautions are possible:

- Maximum Age Exceeded: A product has a licensed maximum age that is less than the age of the patient.
- Minimum Age Not Met: A product has a licensed minimum age that is more than the age of the patient.



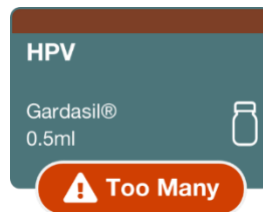
### Too Close Cautions

Too Close Cautions are shown when less than the minimum interval time has elapsed between doses for a product.



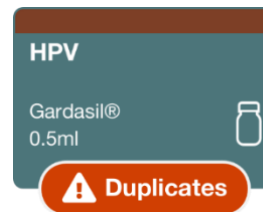
## *Too Many Cautions*

Too Many Cautions are shown when a patient has already received all doses in a series.



## *Duplicate Cautions*

Duplicate Cautions display when select products are the same or crossover within the same disease group, such as a patient dispense that contains one dose of Kinrix® (DTaP + IPV) and one dose of Daptacel® (DTaP). These conditions will result in a Duplicate Caution since both doses include DTaP.



## *Gender Cautions*

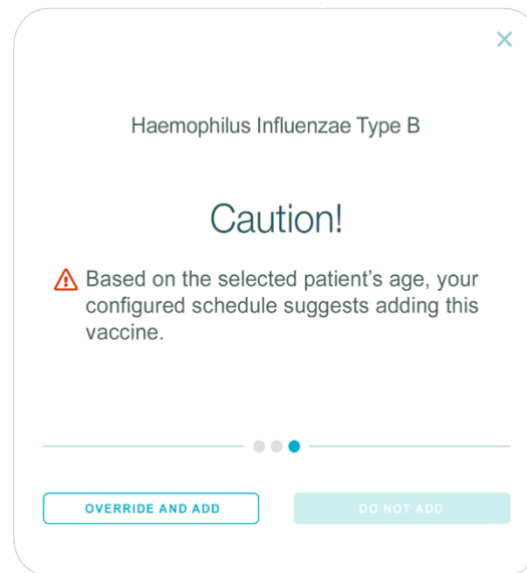
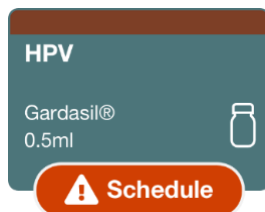
Gender Cautions appear when a patient's gender is different from the product's licensed guidelines.

## *Schedule Recommendation*

The Schedule caution does not apply to products selected for Dispense, instead it applies to products that can be added. The caution triggers based off the ACIP schedule that can be customized and configured for each practice on the AccuSite portal.

When a Schedule Caution is displayed, the following options are available:

- **Override and Add:** This option adds the suggested product to the Dispense list.
- **Do Not Add:** The suggested product will not be added to the Dispense list.



## Multiple Cautions

If a dispense is associated with multiple types of cautions, a Multiple badge is shown on the product. All cautions need to be reviewed before the product can be dispensed.

### *Scrolling through Multiple Cautions*

All cautions need to be addressed before a Dispense – whether they all apply to one product or multiple products. When there is more than one caution that needs to be addressed the user can:

- Scroll from caution to caution via finger swipe.
- Press the arrow button to move forward or backward.
- Press the tiny circle at the bottom of the popup.
- Auto scroll: After each caution is addressed (either via override or do not dispense) the screen will automatically scroll to the next caution.

Patient Safety Alerts will only run when dispensing for a patient via Patient or Order mode and will not apply if the user chooses to continue without a patient.

## Address Cautions

Users can address the open patient safety cautions by pressing the Review Cautions button at the bottom of the screen. A popup will appear with details on the patient safety caution and why the product was flagged, and the user will have the option to Override the caution or select Do Not Dispense to remove the product from the Dispense list.



## Override a Caution

Users are required add a reason for a patient safety override if they want to move forward and dispense the product. When the Override Caution button is pressed a textbox will appear on screen, requiring the user to add a reason to override the caution. Once the reason is entered and saved, the red-colored safety caution affixed to the product card will be recolored orange and read “Overridden”. The user can now dispense that product.



## Return

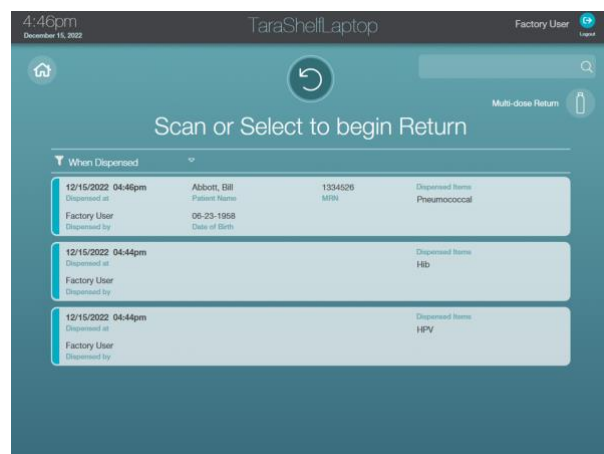
The Return section allows users return dispensed items back into inventory. Additionally, a user can opt to waste a dispensed item via the Return section.



When users select the Return button, they are brought to a screen listing recently dispensed items. The items are grouped together and organized by each dispense transaction.

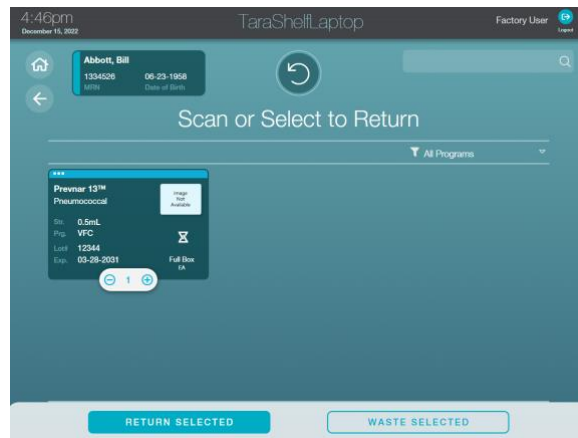
To return an item, simply scan the barcode on the item. If the item has been dispensed multiple times throughout the day, manually select on the correct dispense transaction. Users can also search or scroll to find the dispense transaction that includes the item. Once the row is found, press it.

The user will then be brought to the Scan or Select to Return screen, where they will be able to scan or select the item that needs to be returned to inventory. Once an item is selected, the user will have the option to return the selected item(s) to inventory via the Return Selected button or waste the item via the Spoil Selected button.



Once the user selects Return Selected or Waste Selected, they will be brought to a confirmation screen to finalize the transaction. When the confirmation is finalized, the effects of the transaction are immediate:

- If the user confirms a wastage, the item will now be tracked in activity as a wasted item. This is a filterable transaction that can help users track waste in the AccuSite portal.
- If the user returns the item:
  - The item will be added back into inventory with the same lot/expiration/program as it had before. The inventory count for that item will thus increase based upon the amount returned, and the transaction will be tracked in the activity report.
  - If a patient was associated with the dispense, that patient's activity history on the AccuSite portal will no longer show that item. This will also occur if a waste transaction occurred for a patient's dispensed item.



## Reconcile

The Reconcile section allows users ensure that the inventory counts on the AccuShelf match the physical inventory. AccuShelf tracks each transaction, but discrepancy in inventory counts can still occur due to human error. The reconcile process lets users update the AccuShelf inventory based on the physical item count, while tracking discrepancies along the way.

Reconcile is found in the Inventory section. Press Inventory and then press Reconcile. Once the Reconcile button is pressed, the user will be brought to a list of the open Ad Hoc Reconcile tasks. Each task will include the status, last complete date, due date, count, and the assigned user's name.

### Create an Ad Hoc Task (Plan Cycle Counts)

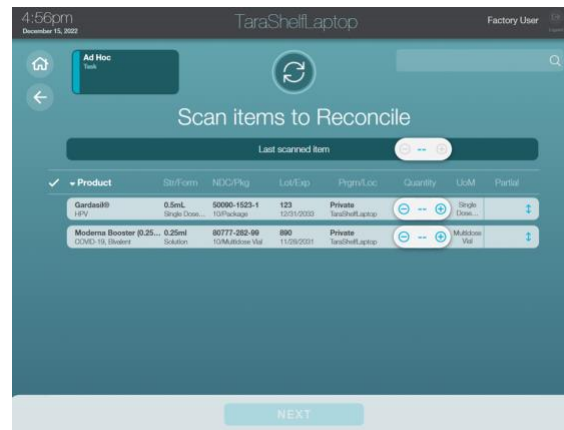
Users can pick and choose which items they would like to reconcile via the Inventory View screen. Once a filter is selected, the user can begin tapping on item cards (there is no limit to how many cards can be added to a Reconcile task).

Once all the items are selected, the user can press the Assign Selected to Reconcile button at the bottom of the screen. When that button is pressed, the user is brought to the Reconcile section and a list of open Ad Hoc tasks.

#### *Scan items to Reconcile screen*

Selecting a task will bring the user to a list of the assigned items. The table has columns for the product, strength/form factor, NDC/package, lot/expiration, program/location, quantity, unit of measure, and partial. Items are sortable via column header just as other tables on AccuShelf.

Users have the option to scan items to count or manually count via the quantity column. The recently scanned item will appear in the box at the top of the screen and highlighted in the table below for easy reference.

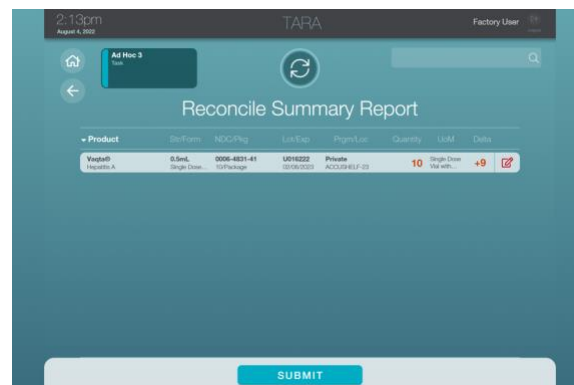


## Package versus Unit View

Each item will have a default unit of measure, but users can switch between package and unit counting via the item's detail card. The item's detail card includes a layout like other cards on AccuShelf, including the ability to switch the quantity view between package and unit. If the user feels more comfortable counting physical packages, they can set the view to package; if not, they can view and count by individual units.

## Reconcile Summary Report

After users have adjusted their quantities and finished their counts, they can press the Next button and move to the Reconcile Summary Report. The table has columns for the product, strength/form factor, NDC/package, lot/expiration, program/location, quantity, unit of measure, delta, and note icon.



If there is a discrepancy, the following changes will occur:

- The delta column will fill with the discrepancy amount.

- Both the quantity and delta columns will turn red-colored.
- The note icon will appear, and the user will have to add a discrepancy note prior to submitting the completed task.

If there are no discrepancies, the user can press the Submit button to complete the reconcile task.

### *Completing a Task*

Once the submit button is pressed on the Reconcile Summary Report, both the inventory counts and task status will update. If not every item in the task was counted, the task will remain open with the non-reconciled items. If every item was counted, the task will be marked as completed. The activity will be logged in the Activity Report. To view this report, press “Inventory”. Press “Activity.”

## Express Reconcile

The Express Reconcile feature allows users to quickly reconcile items (for example, to be used when a discrepancy is caught but not during formal cycle counting). This is to further ensure that inventory counts on AccuShelf match the physical inventory on hand. AccuShelf tracks every transaction, but discrepancies in inventory counts can still occur if an item was not scanned, misplaced, etc. This process lets users update the AccuShelf inventory based on the physical item count.

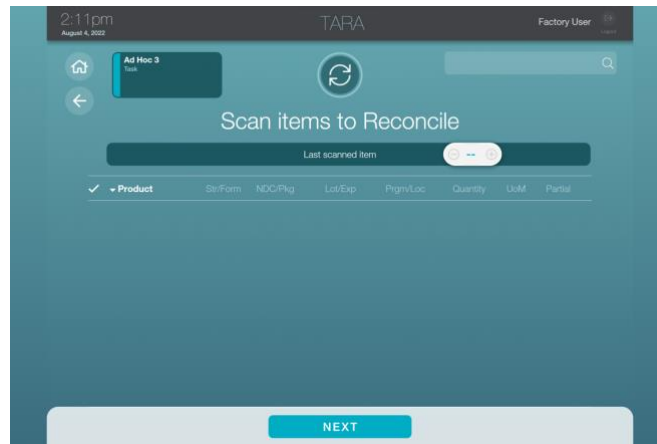
### *Short Form Workflow:*

To express reconcile inventory, please follow the below:

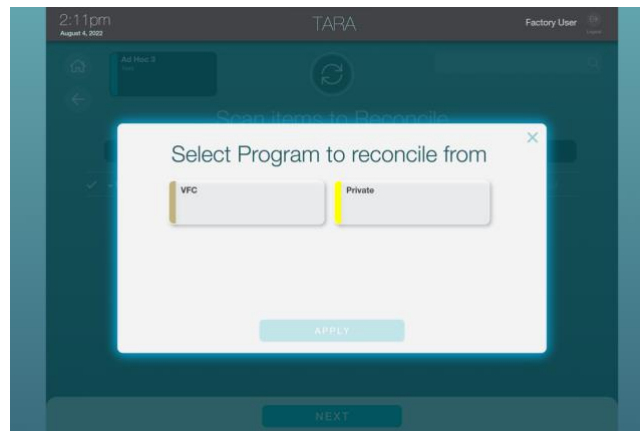
1. Press “Inventory”
2. Press “Reconcile”
3. Press “Reconcile Now”
4. (Scan Item)
5. Select item’s lot and expiration if there are multiple
6. Adjust quantity
7. Press “Next”
8. Press “Submit”

### *Detailed Workflow:*

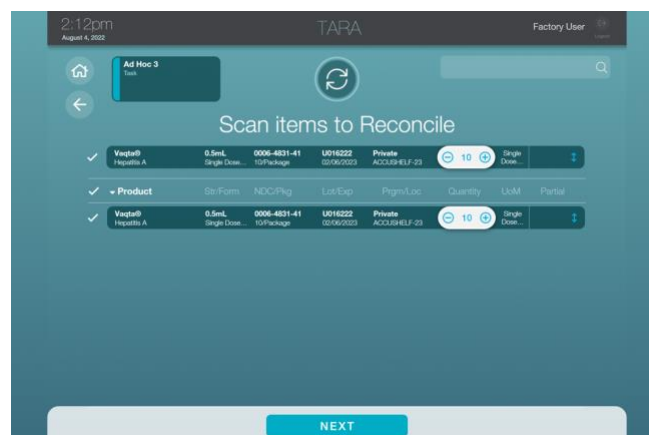
1. The user can choose which items they would like to reconcile via the Inventory screen (From the home page, press “Inventory”). Press “Reconcile”. The user will be taken to the Reconcile Task List. Press “Reconcile Now” on the top right. This will take the user to the “Scan Items to Reconcile” page.



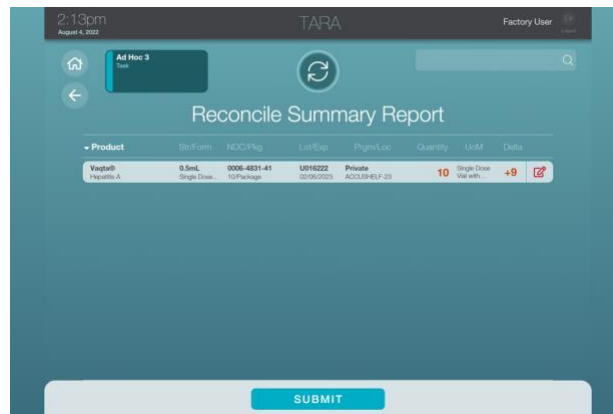
2. Scan the item that the user wants to reconcile and press “Next”. The user will be prompted to select which program the item(s) belong(s) to. Press the appropriate program and press “Apply”.



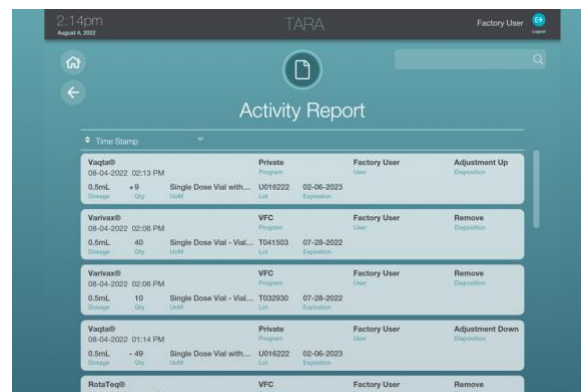
3. This will bring the user to a table of the scanned items. The table has columns for the product, strength/form factor, NDC/package, lot/expiration, program/location, quantity, unit of measure, and partial. Items are sortable via column header. Manually adjust the quantity to represent the physical inventory on hand. Press “Next”.



4. The user will be brought to the Reconcile Summary report. If there was a discrepancy, the following will occur:
  - a. The delta column will fill with the discrepancy amount.
  - b. Both the quantity and delta columns will turn red-colored.
  - c. The note icon will appear, and the user will have to add a discrepancy note.
  - d. If there are no discrepancies, press “Submit.”



5. Once the submit button is pressed on the Reconcile Summary Report, both the inventory counts and task statuses will update. If every item in the task was not counted, the task will remain open with the non-reconciled item(s). If every item was counted, the task will be marked as completed. The activity will be logged in the Activity Report. To view this report, press “Inventory”. Press “Activity.”



## Inventory

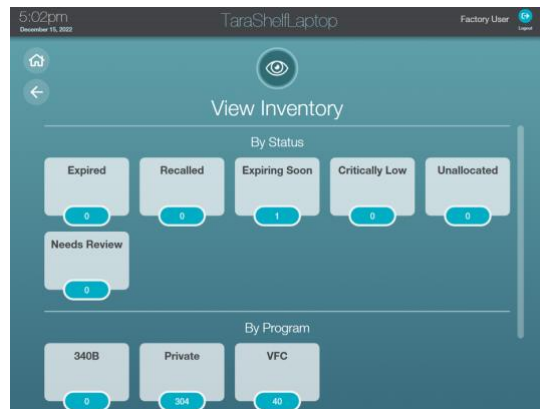
The Inventory section allows users to view the site’s on hand inventory and recent activity via the View and Activity buttons, respectively. The Reconcile and Manage buttons also live here.



## View

Selecting the View button brings the user to a list of filters. Below each filter is a number that refers to how many units are currently on hand. Selecting a filter will bring up a list of items that match that filter.

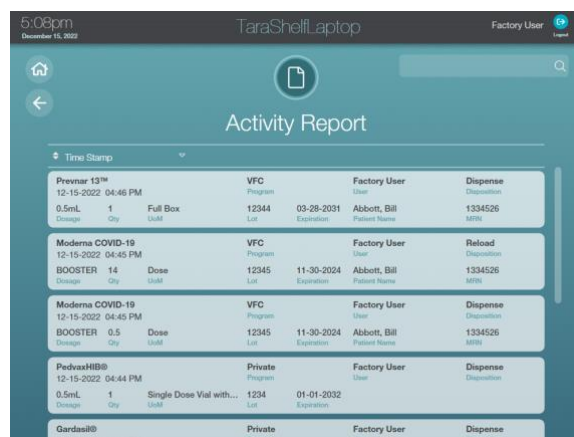
- **By Status:** filter on different conditions affecting inventory
  - Expired: items that have expired– these cannot be selected for dispense.
  - Recalled: items that have been recalled by the FDA- these cannot be selected for dispense.
  - Expiring Soon: A list of items that are near expiration, alerting the user to act on using or allocating those items as necessary prior to expiry.
  - Critically Low: based on the number of units on hand and the average daily usage for an item, items that are low in stock will be listed here.
  - Unallocated: items that are not assigned to a particular lot/expiration when they are dispensed. Generally, it's for high use items (for example, aspirin) that are configured to not require entry of lot/expiration when the item is dispensed. At load time the user enters the lot/expiration information. However, when dispensed the user doesn't have to enter the lot/expiration. Therefore, the dispense doses are unallocated. That is resolved during Reconcile, when the user assigns quantities to all lots/expiration of the item.
  - Needs Review: items that have gotten into a state where they likely need to be removed from the system (and possibly re-added). For instance, a multi-storage temperature item that had the allowed storage environments changed, and as a result an already loaded item ended up in an invalid storage environment.
- **By Program:** filter on the different programs available on AccuShelf.
- **All:** view all the on-hand inventory at one time.



## Activity

The user can view all the recent AccuShelf transactions via the Activity section. Scroll through or search for a specific transaction or view each transaction in greater detail on the AccuSite portal. Each transaction includes the following details:

- Item details including the name, dosage, lot, expiration, and program.
- Date, time, and type of transaction.
- The user's name.
- Patient details including name and MRN (patient mode only).



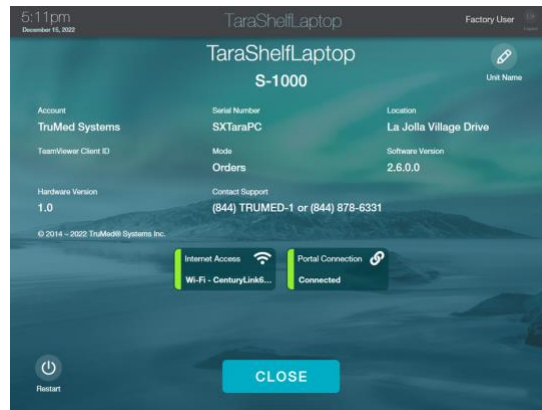
## Information Screen

The information screen is always accessible by pressing the AccuShelf name on the black bar at the top of the screen. Once the name is pressed the information screen will scroll down, including the following actions and information:

- Edit Unit Name button (only available to logged-in Administrator users).
- Restart button (restarts the AccuShelf software).
- Account and Location Name.
- AccuShelf Serial Number.



- TeamViewer ID.
- The dispense mode.
- Software and Hardware versions.
- Internet and AccuSite portal connectivity status.
- TruMed System's Support contact number.



## Temperature Monitoring with AccuShelf TM

AccuShelf TM units have a built-in temperature monitoring system. Digital data loggers (DDLs) connected to the fridge and/or freezer send temperatures via Bluetooth to the AccuShelf monitor, where they are then sent to the AccuSite portal.

### Temperature Display

Each fridge or freezer will have 1 DDL, and each DDL's temperature status will be displayed in a box on the AccuShelf's screensaver and login screen.

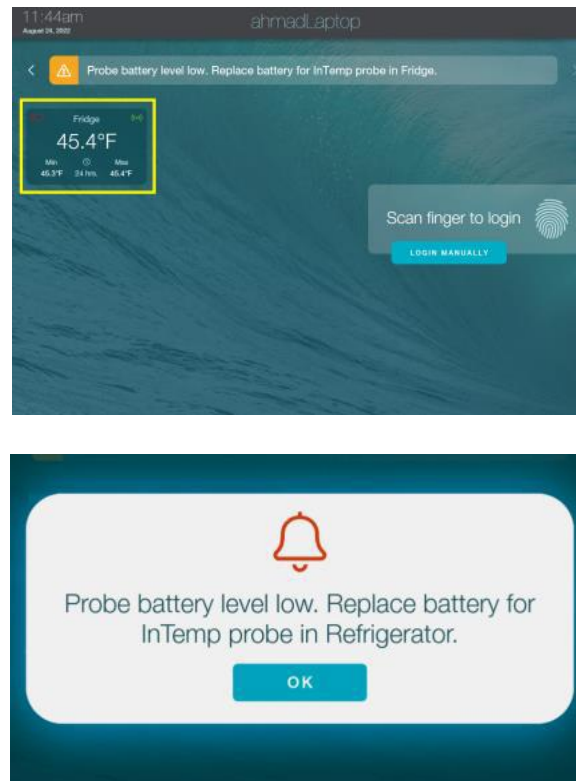
The box will designate whether it is monitoring the fridge or freezer, display the current temperature, and list the min and max temperature over the last 24 hours. Pressing the box will cause it to expand, showing a temperature graph that can be switched from a daily to weekly display. Users can also opt to switch between Fahrenheit and Celsius.

### Temperature Alerts

Temperature-related alerts will occur whenever a DDL will go out of range. Users will be notified via email and/or text when the fridge/freezer is near excursion or having an excursion. Users will also be notified once the temperature is back in range. Additionally, an alert banner will appear at the top of the screen and the temperature box will turn a deep red.

### Low Digital Data Logger Battery

An alert will trigger to notify users when a DDL's battery is low. This allows users time to take steps to verify that all relevant historical data has been captured, before replacing the batteries, to ensure that no data is lost.



## Temperature Confirmations

Twice a day – once before 12 PM and once after – a user will be prompted to confirm the fridge/freezer temperatures before moving forward to the home screen. Once the temperature is confirmed, the user's first and last name, date and time, current fridge and/or freezer temperature will be sent to the AccuSite portal. Users can access the monthly confirmation reports in the AccuSite Temperature section.

## Temperature Indicator

On the AccuShelf's home screen is the Temperature section, which is available to all users. The temperature section will display the same boxes as the screensaver/login screen, with the ability to view the temperature in a graphical format.

## Transfer

The Transfer feature is available to customers with multiple AccuShelf sites, allowing them to transfer inventory from one site to another, helping to track the movement of inventory throughout the entire account. Users can leverage the new transfer workflow with their central

pharmacy, receiving bulk items at the pharmacy and using Transfer to send various quantities to offsite clinics.

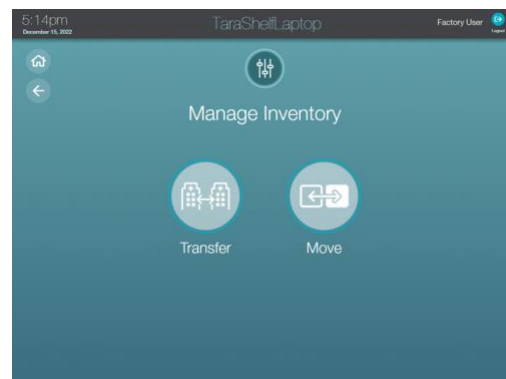
## What is a Transfer?

A Transfer is a collection of items that are moved from an origination site to a destination site. Users will add items to an internal Transfer ID at the originating site and choose the destination site within the account. At the destination site, users will go to the Load section and choose the internal Transfer ID number to begin receiving the transferred items.

## Create a Transfer

To create a Transfer, go to the Inventory section and select the Manage button. The Transfer button will be filled in and selectable if there is inventory in stock; if there are no items in stock then the Transfer button will be greyed-out and not selectable.

Note: Transfers cannot be created or completed without a connection to AccuSite.



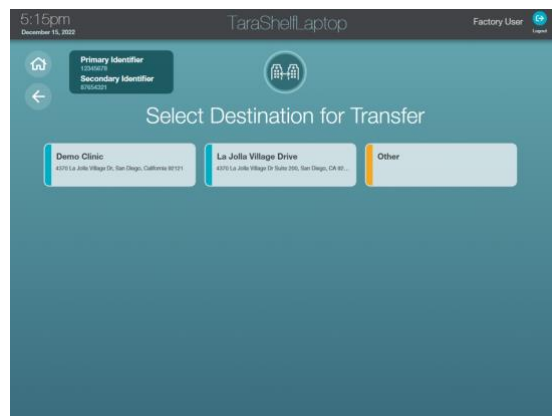
## Enter Transfer ID

After the Transfer button is selected, the user is prompted to add a Transfer ID which serves as an 'internal invoice' that will be sent to the destination site. The transfer ID is automatically generated but can be edited as necessary. Press the DONE button at the bottom of the screen to move forward.



## *Select Destination for Transfer*

The Transfer ID is captured and displayed in the upper left-hand corner on the Select Destination for Transfer screen. Listed for selection on this screen are the destination sites for the Transfer; all the sites in an Account that have an AccuShelf are available.



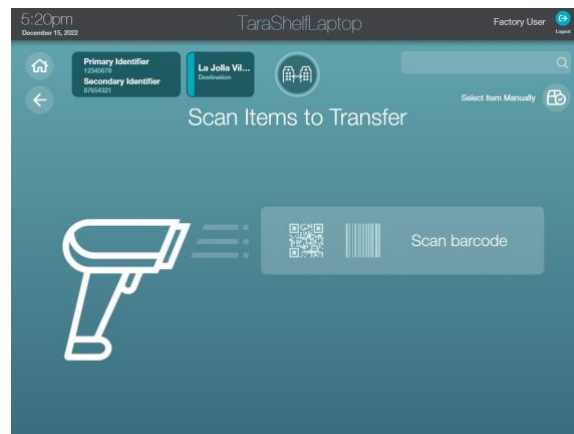
Each option has the site name in bold with the site address listed below. A 'Other' site is available in addition to the account's sites.

## *The 'Other' Site*

If the items being transferred are leaving the account and not to be loaded at a different site (such as being returned to the manufacturer, for example), the 'Other' site can be selected.

## *Scan Items to Transfer*

The Transfer ID and Destination site have been selected so items can now be added to the Transfer list. The Scan Items to Transfer screen functions similarly to Load: once an item is scanned or manually selected via the 'Scan item Manually' button a table of Transfer items appears.



Users can adjust the package quantity, remove items from the table, and switch the unit of measure value on the Item Details card. Most importantly is that users can Transfer any group of items at one time, even if items belong to multiple programs. There is no need to create separate Transfers for different programs or items; everything can be sent and loaded at once.

Once all items have been added and adjusted the user can press the NEXT button at the bottom of the screen.

## Transfer Report Notes and Submission

The user has the option to add details or notes to the Transfer before submitting. When the user is ready to submit the Transfer press the 'Submit' button.

Once a Transfer is submitted, the items on the Transfer are removed from the originating site's inventory. The items will be tracked via the AccuSite Transfer report but will not appear in either the originating or destination site at this time.

## Load and Close a Transfer

Transfers will remain open on this screen until they are loaded and closed out by an administrator.

## Sample Management

AccuShelf supports sample management through the barcodes created and associated with samples. These barcodes can be found on the AccuSite portal. For samples that are not yet created, users can use the pre-populated email in the portal to contact the team to get it added.

If the user would like to print the barcodes, they are set to 1 1/4" X 3 3/4" rectangular dimensions.

## 340B Workflow

AccuShelf offers a 340B feature to help users more effectively track and manage 340B medications. Ease reporting duties and free up staff time by using these workflows.

### Dispense 340B Medications

When users go to Dispense, they will be prompted to add a Provider and Payor for 340B medications.

Users follow the normal Dispense workflow, adding medications to the 'Scan Items to Dispense' screen. Once the user has captured all items for the patient, press the NEXT button to move forward.

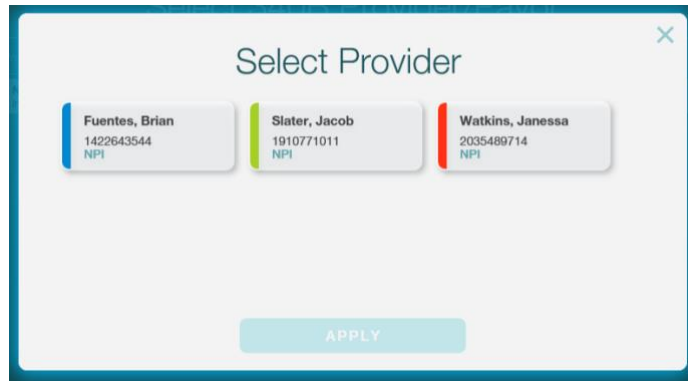
The next screen the user is brought to is determined by the items they selected:

- If 340B medications were selected for dispense: the user will be brought to the Select 340B Provider/Payor screen.
- If users selected 340B medications along with non-340B program medications: the user will be brought to the Select 340B Provider/Payor screen to apply providers/payors to the 340B items only. Non-340B items will not appear in the list.
- If no 340B medications were selected: the Dispense workflow continues as normal and the user will be brought to the dispense confirmation screen.

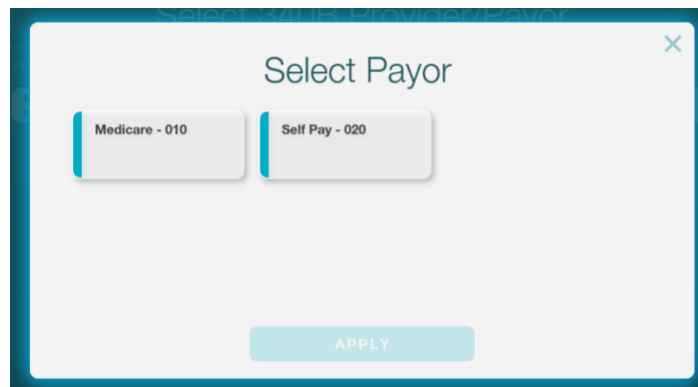
### Select a Provider/Payor

Users can add a Provider on the Select 340B Provider/Payor screen by pressing the exclamation point icon on each row. When the icon is pressed under the Provider column, the user can choose a provider to apply to that row.

The user can choose a provider card and press the Apply button to make the selection.



The same steps are followed when choosing a payor. Users can choose from a list of payors and apply the selection.



## Add New Providers/Payors

If the provider/payor the user is looking for is not available, the user can add a provider/payor by choosing the Add Provider or Add Payor buttons on the Select 340B Provider/Payor screen.

- To add a provider, enter their First Name, Last Name, and NPI. Press the Save button to create the new provider.
- To add a payor, enter the payor name and payor code. Press the Save button to create the new payor.
- Users can also add, edit, or delete providers/payors from the AccuSite portal.

Once all 340B items have been updated with a provider/payor, the user can confirm the dispense items on the Were these products Dispensed? screen to complete the workflow.

## COVID-19 Vaccine Workflows and Features

AccuShelf tracks COVID-19 vaccines, both primary series and boosters, based off CDC guidelines.

Refrigerator Icon



Freezer Icon



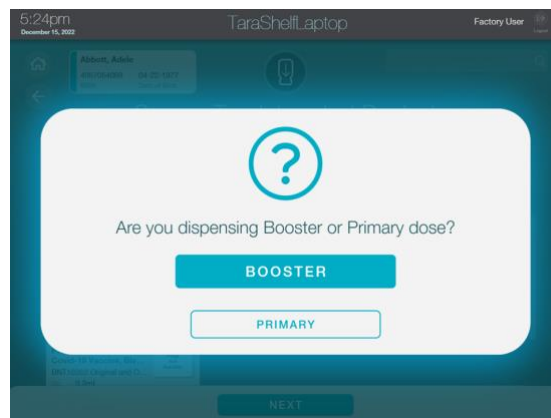
Ultra-Low Freezer Icon



## Dispense COVID-19 Vaccines

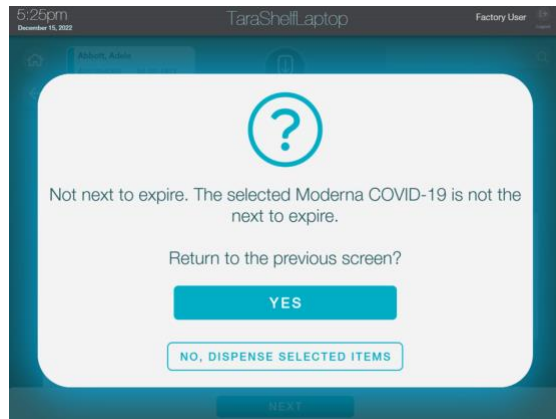
AccuShelf will always prompt the user to default to the vaccine that will expire next based off temperature environment, puncture time, and if assigned, a vial label number.

1. Select Dispense.
2. If in Patient Mode or Order Mode, choose a patient/order or select 'Continue without patient'.
3. Scan or select the vaccine to dispense.



1. Scan or use the '+' to add to the dose quantity dispensing.
2. If multiple lots, select the card to choose a specific lot.
4. Select Next after all items to dispense are scanned/selected.
5. If the scanned/selected vaccine is NOT next to expire, the user will be prompted with the following message:





6. Select 'Yes' and select the correct vaccine to expire next. Select 'NO, Dispense selected items" to dispense with the current vaccine scanned/selected.
7. To commit dispense, select 'YES', all items will be decremented from inventory.

## Multi-Dose COVID-19 Vaccines

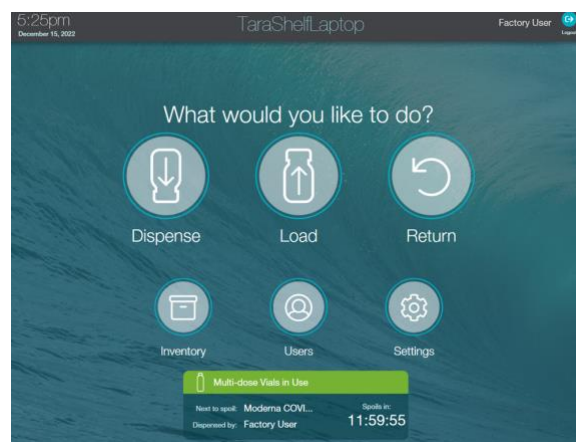
AccuShelf tracks every dose in a multi-dose vial, including COVID-19 vaccines.

### Multi-Dose Timer

The multi-dose time displays after every dispense. This timer indicates there is a COVID-19 vaccine vial that has been dispensed and is at room temperature. This includes:

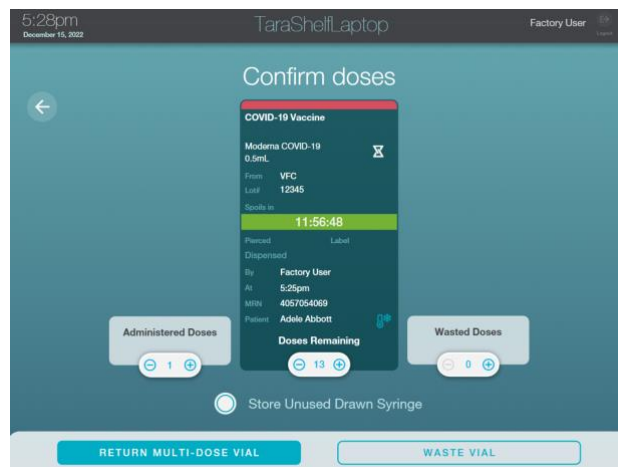
- Next to spoil: Name of the vaccine to spoil, if more than 1 multi-dose vial is out
- Dispensed by: Name of the user who dispensed the multi-dose vial
- Spoils in: The time remaining until all remaining doses in the vial are spoiled

NOTE: AccuShelf will continue counting down the timer for any punctured COVID vaccines, as based on CDC storage requirements. To see any COVID vaccines that are nearing expiry, login, select Inventory, then View and filter on the 'Expiring Soon'.

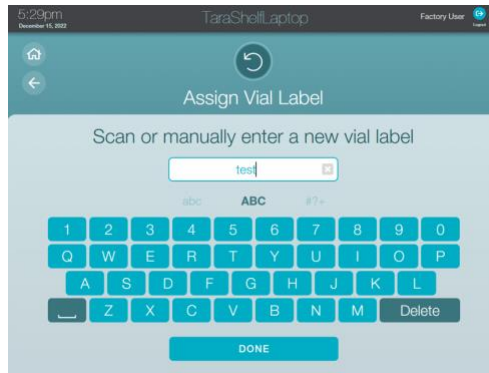


## Return COVID-19 Multi-Dose Vials

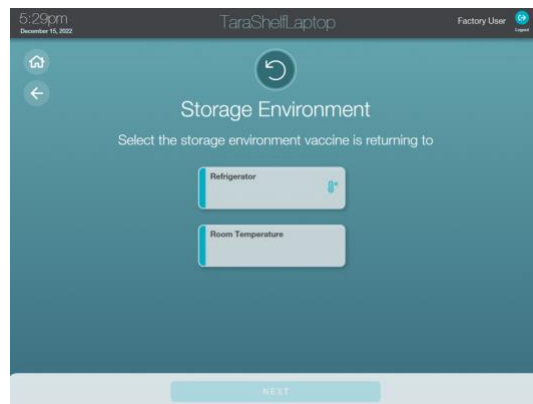
1. Select the Multi-Dose Timer on the home screen.
2. Confirm or adjust doses administered, remaining, and spoiled by using the '+' and '-' buttons on the screen.
  - Administered Doses: Total doses administered from the vial.
  - Doses Remaining: Total doses that are still in the multi-dose vial after administration.
  - Wasted Doses: Any wasted doses that were not administered nor remain in the multi-dose vial.
  - I've drawn a dose into a syringe: Check this if a dose was drawn but not administered.
3. After confirming the dose quantities, select one of the buttons below:
  - Return multi-dose vial: Continue the return process.
  - Waste vial: Wastes the entire vial and all doses. Only choose if necessary.



4. (Optional Step) Assign Vial Label: This workflow is to aide users to distinguish every specific vial to make sure the next to expire vaccine is correct when physically chosen by the user.
  - Vial Label options:
    - Apply a thermal barcoded sticker and scan the barcode\*
    - Manually enter a label (Recommend 4 digits)
  - Select Done.



5. The user should choose the storage temperature where the vaccine will be returned. All viable storage temperature environments are listed as a card. By selecting the environment, AccuShelf will update and track expiry and beyond use date for the vaccine returned.



6. Complete return of multi-dose vial.

## Move COVID-19 Vaccines

To move on hand COVID-19 vaccines between storage temperature environments and automatically update the vaccine beyond-use-date, the Move workflow is available. For example, the Move workflow allows a user to move 5 multi-dose vials of Moderna from the freezer to the refrigerator. AccuShelf will automatically update the beyond-use-date to 30 days (storage requirements) for the 5 selected multi-dose vials.

1. After logging in, select Inventory and then 'Manage'.
2. Select the new Move icon. NOTE: Currently, only COVID-19 vaccines can be moved between storage temperature environments.
3. Scan or Select Item Manually to begin the move.
  - Scan: Scan a COVID-19 vaccine in inventory to identify the correct vaccine and details. If there are multiple lots of same vaccine, the system will ask to select a specific lot.

- Select: Choose “Select Item Manually” to see list of all COVID-19 vaccines in inventory. Select the vaccine card for the vaccine to be moved.
4. Choose the destination storage temperature Only the supported temperature destinations are available to be selected. A user is unable to select a wrong destination. The vaccine will be added to the Move list.
  5. Update the quantity being moved to the new temperature with a +/- or by scanning. If moving vials versus packages, select the row and change the UoM in the details screen.
  6. Complete the Move.
  7. Select Next.
  8. Select Yes to commit the move of COVID-19 vaccines to the destination temperature environment.
  9. Physically move the vaccines to their new storage. AccuShelf will automatically update the beyond-use-date to the correct date and time

## Power On and Off AccuShelf

1. Press the power button on the bottom right side of the screen and hold for 4 seconds.
2. The power light will come on (blue LED).
3. AccuShelf software should automatically launch.

