



IntelliVault™ WITH AUTOLOG™



TRAINING MANUAL

24 Hour Support (866) 477-2682

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FCC Compliance Notice

English

Per FCC 15.19(a)(3) and (a)(4) This device complies with part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

Per FCC 15.21 Any change or modification to this device not expressly approved by GSL Solutions, Inc. voids your authority to operate this device.

This device complies with Industry Canada license-exempt RSS standard(s). Operation is subject to the following two conditions: (1) this device may not cause interference, and (2) this device must accept any interference, including interference that may cause undesired operation of the device.

French

Selon FCC 15.19 (a) (3) et (a) (4) Cet appareil est conforme à la partie 15 des règles de la FCC. Son fonctionnement est soumis aux deux conditions suivantes: (1) Cet appareil ne doit pas causer d'interférences nuisibles, et (2) cet appareil doit accepter toute interférence reçue, y compris les interférences pouvant entraîner un fonctionnement indésirable.

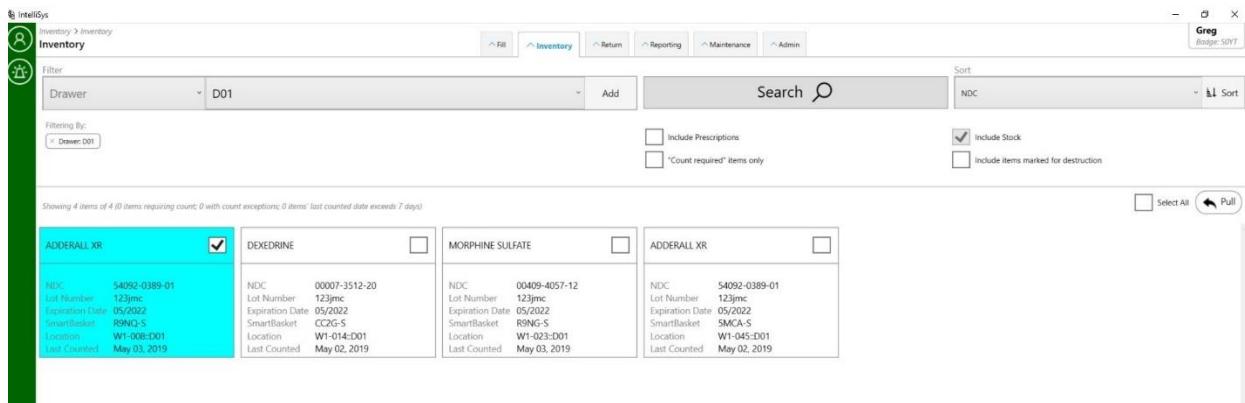
Conformément à la FCC 15.21 Tout changement ou modification de cet appareil non expressément approuvé par GSL Solutions, Inc. annule votre droit d'utiliser cet appareil.

Cet appareil est conforme aux normes RSS exemptes de licence d'Industrie Canada. Son fonctionnement est soumis aux deux conditions suivantes: (1) cet appareil ne doit pas provoquer d'interférences, et (2) cet appareil doit accepter toute interférence, y compris les interférences susceptibles d'entraîner un fonctionnement indésirable de l'appareil.

Inventory Adjustment

Inventory counts are adjusted as they are discovered to ensure accurate counts. There are two types of inventory adjustments: a change in status (i.e. the medication is still present and accounted for, but may not be usable); and an adjustment where the medication just doesn't exist (i.e. if it was stolen). Different privileges exist for the two different types of inventory adjustments.

1. Navigate to *Inventory > Inventory*
2. Select Inventory Type (e.g. Full or Custom)
3. Select *Filter* (e.g. NDC). Enter info (e.g. NDC#), press *Add*, press *Search*
4. Select SmartBasket(s) to retrieve, press *Pull*
Note: Second person logs in if participating in audit of the Back-count
5. Press *Pull* and follow pick light to retrieve SmartBasket(s)
6. Place SmartBasket on IntelliPad
Note: To transfer contents to a different SmartBasket, press the *Transfer Contents* button on the SmartBasket widget. Place a new SmartBasket on the IntelliPad and press *Done* to complete the transfer
Note: Press *Cancel* to cancel the transfer
7. Press *Adjust Inventory*
8. Choose *Single or Multiple Adjustment*
9. Choose *Adjustment Type* from drop down
10. Enter required information in *Notes* field
Note: Make simultaneous adjustments in PMS if applicable.
11. Place lid on SmartBasket and shelve into IntelliVault
12. An Exception Report will be generated (*Reporting > Exception Report*) and the inventory adjustment as well as any comments will also be included in the Perpetual Log (*Reporting > Perpetual Log*)

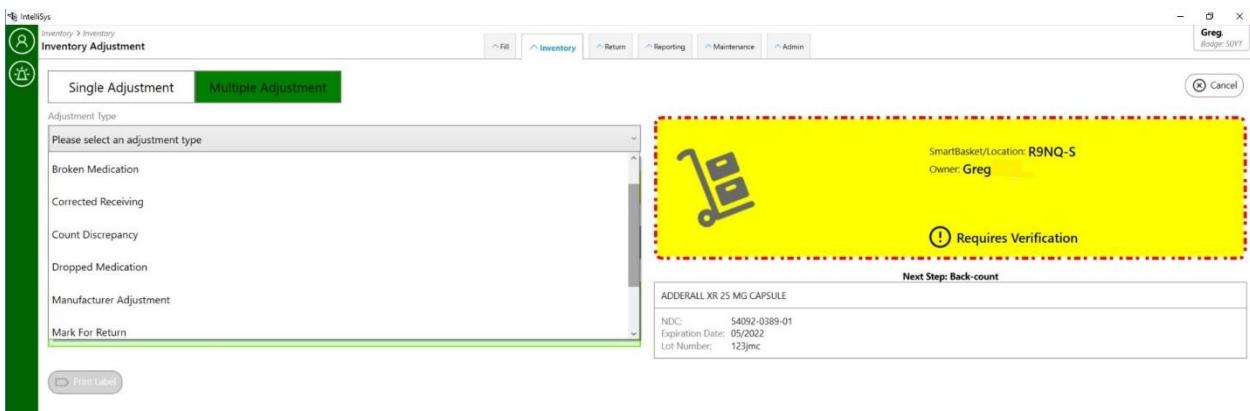


Medication	SmartBasket	Notes
ADDERALL XR	R9NG-S	54092-0389-01 123jmc 05/2022 W1-008-D01 May 03, 2019
DEXEDRINE	R9NG-S	00007-3512-20 123jmc 05/2022 W1-014-D01 May 02, 2019
MORPHINE SULFATE	R9NG-S	00409-4057-12 123jmc 05/2022 W1-023-D01 May 03, 2019
ADDERALL XR	5MCA-S	54092-0389-01 123jmc 05/2022 W1-045-D01 May 02, 2019

Broken or Dropped Medication

1. Press *Adjust Inventory*
2. Choose *Single Adjustment*
3. Choose *Adjustment Type* from drop down menu, either "Broken Medication" or "Dropped Medication"
4. Enter required information in *Reason* field

5. Place an empty basket on the IntelliPad and enter count for broken or dropped pill(s).
6. A prompt will ask if you need a label printed for the Destruction Inventory. If Yes, the label printer will print a label with NDC, drug name, lot number, expiration date, original SmartBasket name, and original SmartBasket barcode.
7. **Note:** Make simultaneous adjustments in PMS if applicable.
8. Place original SmartBasket on IntelliPad and enter count of contents net of dropped/damaged pill(s)
9. Place lid on SmartBaskets and shelve into IntelliVault
Note: Drugs in the *Destruction Inventory* are marked as “Destruction Vault” and removed from the dispensable inventory count
10. An Exception Report will be generated (*Reporting > Exception Report*) and the inventory adjustment as well as any comments will also be included in the Perpetual Log (*Reporting > Perpetual Log*)



Inventory Adjustment Reason Codes

During an inventory adjustment, it is possible – and sometimes required – to enter comments. These comments are displayed inline in the Perpetual Log and Exception Report, as well as a link off of the inventory adjustment on the History screen

<i>Reason Code</i>	<i>Description</i>	<i>Requires Comment</i>	<i>Creates Task Manager Task</i>
<i>Count Discrepancy</i>	The medication count is incorrect and the medication cannot be physically accounted for within the pharmacy.	Yes	Yes
<i>Broken</i>	The medication is broken and the broken medication is being placed into IntelliVault for secure storage. All of the medication is physically accounted for during a count.	No	No
<i>Dropped</i>	The medication was dropped and cannot be used to fill a prescription. The dropped medication is being placed into IntelliVault for secure storage. All of the medication is physically accounted for during a count.	No	No
<i>Physical Inventory</i>	An adjustment that occurred during a physical inventory operation.	No	Yes
<i>Manufacturer Adjustment</i>	Used when a manufacturer shortage (more likely) or overage (less likely) is discovered when a new medication package is opened for the first time.	No	Yes
<i>Liquid Adjustment Within Tolerance</i>	If a count for a liquid medication is incorrect, but within the count tolerance specified for liquid drugs, this category will be automatically generated by the IntelliVault software. This is the only reason code that will be automatically generated.	No	No
<i>Liquid Adjustment Outside Tolerance</i>	If a count for a liquid medication is incorrect and the count is outside the count tolerance specified for liquid drugs, this category can be used to adjust the inventory.	Yes	Yes
<i>Mark for Return</i>	The medication was received into IntelliVault for secure storage, but will be returned to the wholesaler for reasons determined by the pharmacy. For example, if the wrong drug is shipped, the pharmacy will remove the drug from dispensable inventory by adjusting the	Yes	Yes

inventory using the Mark for Return reason code.

Consolidate Stock

Stock from multiple baskets may be consolidated into fewer baskets for efficient storage.

1. Navigate to *Inventory > Consolidate Stock*
2. Choose *Filter*, Press *Add*, Press *Search*. Multiple items (e.g. NDC and Lot#) may be entered to refine the search.
Note: To search all baskets that qualify for consolidation, press *Search* without entering data in the *Filter*. For a “wild card” search (i.e. an abbreviated term), use an asterisk (*) after the term
3. Matching stock will be grouped together for quick reference
4. Select baskets to consolidate.
Note: This feature will only select stock with matching NDC, Expiration Date, and Lot #
5. Press *Consolidate Stock*
6. Follow pick light and retrieve SmartBaskets above the green LED(s)
7. Place first SmartBasket on IntelliPad and enter correct back-count
8. Enter remaining stock basket quantity and press *OK*. Basket widget turns green for a correct back-count. Repeat for each stock basket
Note: Liquid medications have a certain tolerance that is acceptable during Back-count. A back-count that is outside the tolerance will require an Inventory Adjustment. Enter the Back-count quantity for all bottles in the stock SmartBasket.
9. When all selected SmartBaskets have been back-counted, press *Consolidate*. Place a “target” SmartBasket on the IntelliPad. This is the basket that will contain the consolidated stock
Note: The target SmartBasket may be an empty basket or it may be one of the SmartBaskets retrieved from the IntelliVault for the consolidation
10. A message banner will appear at the bottom of the screen stating “Consolidation completed in Smartbasket ‘XXXX’. Please shelve in IntelliVault”
11. Place the consolidated stock in the target SmartBasket
12. Navigate to *Inventory > Verify Stock SmartBasket* and enter correct back-count
13. Shelve the target SmartBasket in IntelliVault. Successful shelving is indicated by a quick blink of a green LED and an audible chirp.

IntelliSys Inventory > Consolidate Stock

Perform Consolidation

SmartBaskets pulled from the IntelliVault

5MCB-S

70TG-S

SmartBasket/Location: **R9R2-S**

Empty

Consolidate Print Label

IntelliSys Inventory > Consolidate Stock

Consolidate Stock

Filter: NDC

Search

Sort: NDC

Filtering By: NDC: 00409-9093-32

Consolidate Stock

FENTANYL CITRATE <input checked="" type="checkbox"/>	FENTANYL CITRATE <input checked="" type="checkbox"/>	FENTANYL CITRATE <input type="checkbox"/>	FENTANYL CITRATE <input type="checkbox"/>
NDC: 00409-9093-32 Lot Number: 1 Expiration Date: May 2022 Quantity: 2 Basket Size: Small Zone: IntelliVaultZone Location: VD003 Basket: R9R2-S	NDC: 00409-9093-32 Lot Number: 1 Expiration Date: May 2022 Quantity: 2 Basket Size: Small Zone: IntelliVaultZone Location: VD003 Basket: D1TD-S	NDC: 00409-9093-32 Lot Number: 2022 Expiration Date: May 2022 Quantity: 1 Basket Size: Small Zone: IntelliVaultZone Location: VD003 Basket: R9P7-S	NDC: 00409-9093-32 Lot Number: 01 Expiration Date: May 2022 Quantity: 2 Basket Size: Small Zone: IntelliVaultZone Location: VD003 Basket: C9AV-S

IntelliSys Inventory > Consolidate Stock

Perform Consolidation

SmartBaskets pulled from the IntelliVault

R9R2-S

D1TD-S

SmartBasket/Location: **D1TD-S**

Owner: **Greg Bell**

Verified

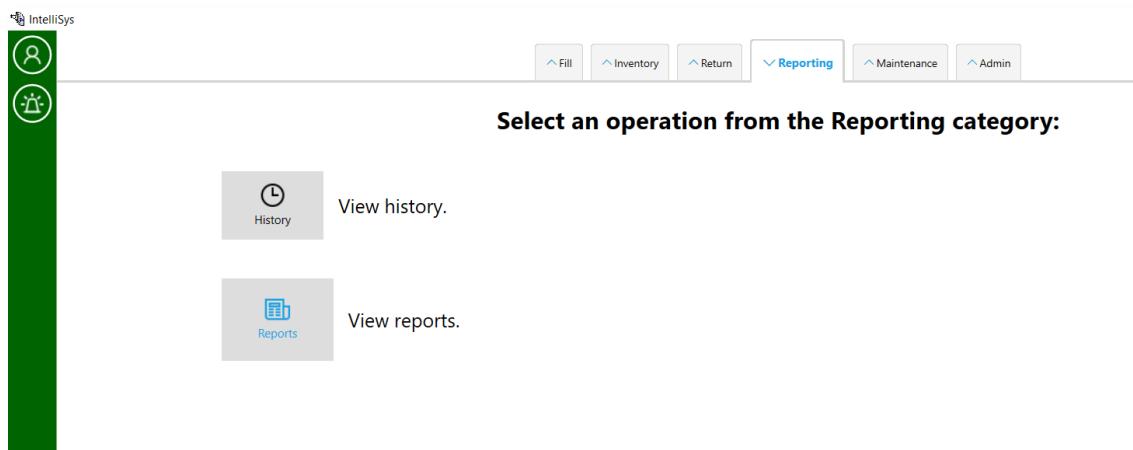
Next Step: Put Away

FENTANYL 100 MCG/2 ML AMPUL

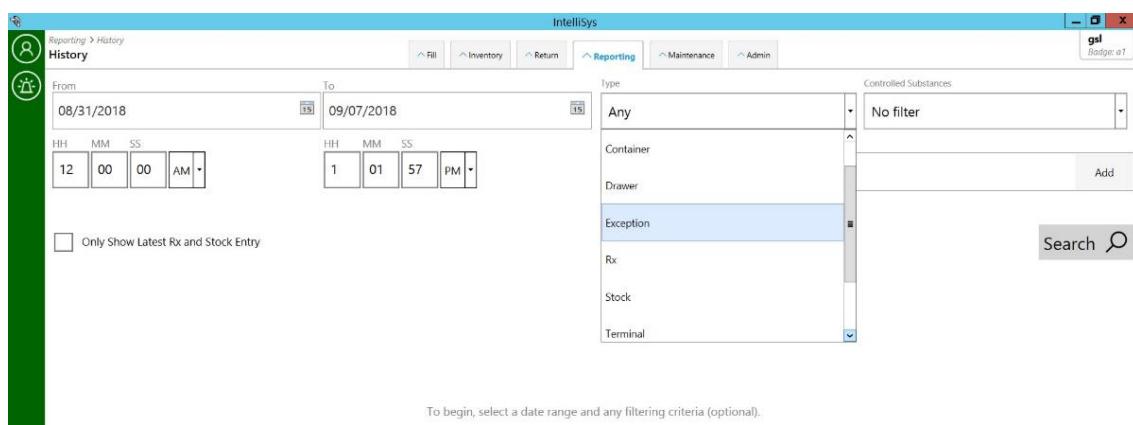
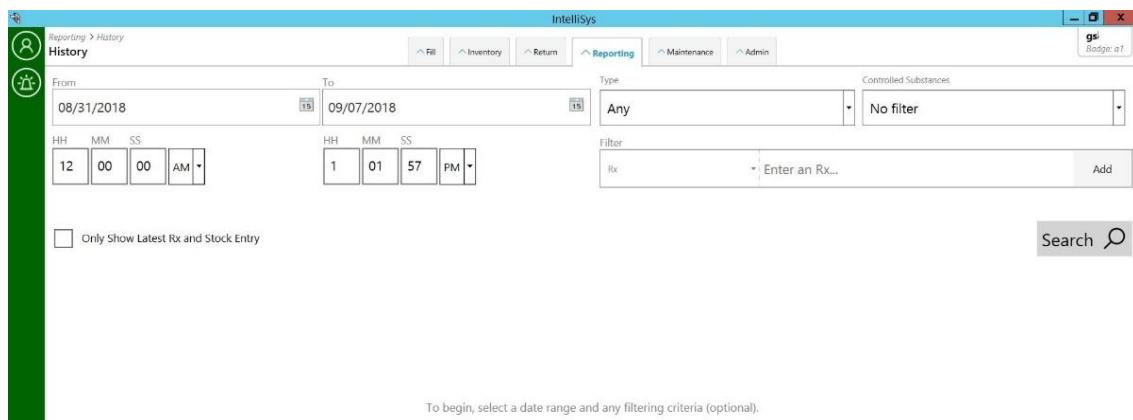
NDC: 00409-9093-32
Expiration Date: 05/2022
Lot Number: 1

Consolidate Print Label

Reporting – Reports and History



History



Reports

Choose type of report and use applicable filters if desired. Reports may be printed or exported to Excel, PDF or Word

The screenshot displays the IntelliSys Reporting interface. The top navigation bar includes icons for User, Reports, and Help, followed by the text "Reporting > Reports" and "View Reports". The top right features links for "Fill", "Inventory", "Return", "Reporting" (which is highlighted in blue), "Maintenance", and "Admin".

The main content area is divided into two sections:

- On-Demand Reports** (left sidebar):
 - Stock Locator Report
 - Inventory Detail Report
 - Perpetual Log Report
 - Filled By User Report
 - Exception Report
 - User Activity Report
 - Activity Report
 - Inventory Summary Report
 - Use It Up Report
 - Purge Report
- User-Generated Reports** (right sidebar):
 - Purge Report
 - Perpetual Log by NDC Report
 - Inventory Operation
 - Downtime Recovery Report
 - Recall Report
 - Stock Receive Report
 - Return To Vendor Report
 - Remove For Recall Report
 - Exception Review Report
 - Inventory Back Count Report
 - Backup Recovery Report

A central message "Please select a report from the left." is displayed between the two sections. The bottom of the interface features a footer with the text "The Leader in Retail Pharmacy Technology" and the copyright notice "©2020 GSL SOLUTIONS, INC.".

Perpetual Log shows Starting Inventory and Ending Inventory as well as any changes. Ending Inventory is highlighted in yellow. The Date Range may be filtered

Perpetual Log

Generated on March 28, 2019 at 12:06:38 PM
Date Range: 03/21/2019 12:00 AM to 03/28/2019 11:59 PM

Pharmacy: GSL Test
Address: 2414 SE 125th AVE.
Vancouver, WA 98683
Phone: (360)555-1212
Pharmacy Number: 555-1212
NABP Number: 1
DEA Number 12345678AB

Schedule 2

ACTIQ 600 MCG LOZENGE HD TEVA USA
63459-0506-30

Timestamp	Operation	Rx Number	Quantity	Running Total	Dispensable Total	User	DEA 222	Invoice	Basket	Reason
Starting Timestamp	Starting Inventory	Received	Dispensed	Adjustments	Returned to Vendor	Destroyed	Ending Timestamp		Ending Inventory	
3/21/2019 12:00:00 AM	Total	103.000	0.000	0.000	0.000	0.000	3/28/2019 11:59:59 PM		Total	103.000
	Stock	103.000							Stock	103.000
	Rx	0.000							Rx	0.000
	Destruction	0.000							Destruction	0.000
	Recalled	0.000							Recalled	0.000
	Back Room	0.000							Back Room	0.000

ADDERALL XR 25 MG CAP ER 24H SHIRE US INC.
54092-0389-01

Timestamp	Operation	Rx Number	Quantity	Running Total	Dispensable Total	User	DEA 222	Invoice	Basket	Reason
-----------	-----------	-----------	----------	---------------	-------------------	------	---------	---------	--------	--------

Perpetual Log by NDC includes active links (shown in blue) for additional detail

Perpetual Log by NDC

Generated on May 01, 2019 at 3:08:51 PM
Date Range: 04/24/2019 12:00 AM to 05/01/2019 11:59 PM

Pharmacy: GSL Lab
Address: 123 Elm Street
Vancouver, WA 98685
Phone: (360)555-1212
Pharmacy Number: 369 867 5309
NABP Number: 1
DEA Number BA32165478

Legend

CLARINEX 5 mg tablet MERCK SHARP & D 00095-1264-01
SYNVISC 16 mg/2 mL Gel GENZYME 58408-0090-01

Name: _____ License: _____
Signature: _____ Date: _____

Page 1 of 1

Exception Report includes all inventory adjustments. The report is available from *Reporting > Reports*, and all inventory adjustments will result in a tile in the Task Manager (*Admin > Tasks*)

Exception Review Report

Rx Number	NDC	Drug Name	Basket	Operation	User	Previous User	Fill	Back Count	Inventory	Adjustment	Reason	Basket Out Time	Timestamp
00591-3503-01	5MF0-S	OXYCODONE HCL	Inventory Adjustment				0.000	68.000	0.000	-32.000	Corrected Receiving	6/4/2019 1:46:24 PM	

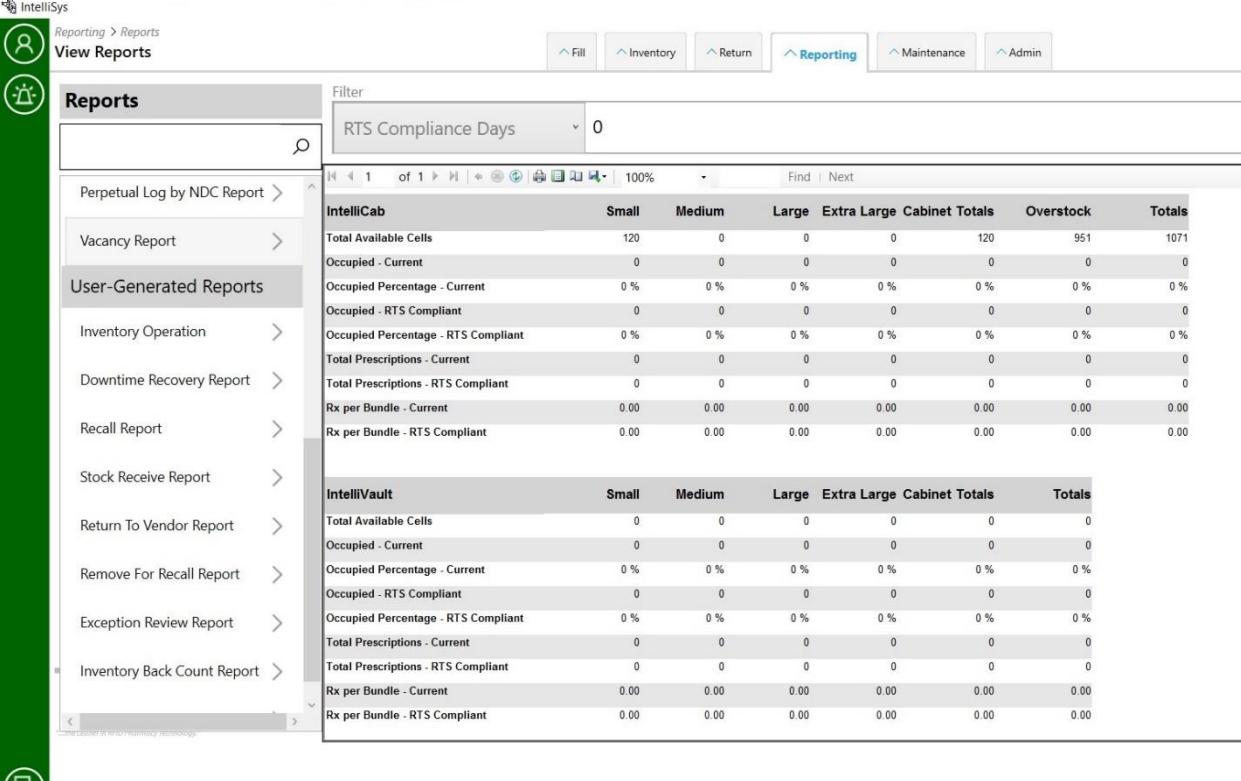
Page 1 of 1 6/5/2019 8:14:48 AM

Inventory Detail Report includes the expiration date for each NDC, as well as the Lot #, Beginning and Ending Inventory, Received and Dispensed.

Inventory Detail

Schedule 2	NDC	Lot Nbr.	Exp. Date	Basket	Beginning Inventory	
ADDERALL 10 mg	tablet	TEVA USA	57844-0110-01	42615479	02-2021	16.000
ADDERALL XR 5 mg	capsule, extended release	SHIRE US INC.	54092-0381-01	al5822b	02-2023	80.000
ADDERALL XR 10 mg	capsule, extended release	SHIRE US INC.	54092-0383-01	am1427b	09-2023	80.000
ADDERALL XR 15 mg	capsule, extended release	SHIRE US INC.	54092-0385-01	am1424b	09-2023	10.000
ADDERALL XR 20 mg	capsule, extended release	SHIRE US INC.	54092-0387-01	AM1293A	08-2023	116.000
ADDERALL XR 25 mg	capsule, extended release	SHIRE US INC.	54092-0389-01	ak9114a	01-2023	80.000

Vacancy Report shows current vacancy for both IntelliCab and IntelliVault. The report includes Rxs per bundle and Return to Stock compliance.



The screenshot shows the IntelliSys software interface with the following details:

- Header:** IntelliSys, Reporting > Reports, View Reports, Filter (RTS Compliance Days: 0), Fill, Inventory, Return, Reporting (highlighted in blue), Maintenance, Admin.
- Left Sidebar:** Reports, Perpetual Log by NDC Report, Vacancy Report (selected), User-Generated Reports, Inventory Operation, Downtime Recovery Report, Recall Report, Stock Receive Report, Return To Vendor Report, Remove For Recall Report, Exception Review Report, Inventory Back Count Report.
- Report Content:**
 - IntelliCab:**

	Small	Medium	Large	Extra Large	Cabinet Totals	Overstock	Totals
Total Available Cells	120	0	0	0	120	951	1071
Occupied - Current	0	0	0	0	0	0	0
Occupied Percentage - Current	0 %	0 %	0 %	0 %	0 %	0 %	0 %
Occupied - RTS Compliant	0	0	0	0	0	0	0
Occupied Percentage - RTS Compliant	0 %	0 %	0 %	0 %	0 %	0 %	0 %
Total Prescriptions - Current	0	0	0	0	0	0	0
Total Prescriptions - RTS Compliant	0	0	0	0	0	0	0
Rx per Bundle - Current	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rx per Bundle - RTS Compliant	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 - IntelliVault:**

	Small	Medium	Large	Extra Large	Cabinet Totals	Totals
Total Available Cells	0	0	0	0	0	0
Occupied - Current	0	0	0	0	0	0
Occupied Percentage - Current	0 %	0 %	0 %	0 %	0 %	0 %
Occupied - RTS Compliant	0	0	0	0	0	0
Occupied Percentage - RTS Compliant	0 %	0 %	0 %	0 %	0 %	0 %
Total Prescriptions - Current	0	0	0	0	0	0
Total Prescriptions - RTS Compliant	0	0	0	0	0	0
Rx per Bundle - Current	0.00	0.00	0.00	0.00	0.00	0.00
Rx per Bundle - RTS Compliant	0.00	0.00	0.00	0.00	0.00	0.00

Admin – Task Manager, Users and Roles

Task Manager

Administrative dashboard to review pending tasks

To view pending tasks:

1. Admin > Tasks
2. Choose Filter (e.g. Status > Not Started)
3. Press Add
Note: Repeat steps 1 and 2 for additional filters to expand or refine search (e.g. Status > In Progress)
4. Press Search
5. Select Sort category if desired and press Sort to prioritize by chosen category
6. Select tile and press Start to review task
7. Press Close when task review is complete
8. Press Finish on tiles to complete task when required

IntelliSys Admin > Tasks Task Manager

Filter: Category: Backup Recovery Add Search Sort Date

Showing 4 of 4 tasks

Select All

Category	Description	Priority	Status
Review Report	04/30/2019, 02:06:47 PM In Reviews, Mark as Recall	High Priority	NOT STARTED
Review Report	04/30/2019, 02:06:47 PM In Mark as Recall	High Priority	NOT STARTED
Review Report	04/30/2019, 01:54:25 PM In Reviews, Downtime Recovery	Medium Priority	NOT STARTED
Review Report	04/30/2019, 10:59:32 AM In Reviews, Downtime Recovery	Medium Priority	NOT STARTED

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Users

Create, View, and Edit users

To create new users:

1. Press *Users* button
2. Press *Create User*
3. Enter User information

Note: To create a user in advance, enter a temporary password in addition to the user's information, then press *User Must Change Password*. When the new user logs in with the temporary password, they will be prompted to change their password

4. Press *Next* to add **Error! Reference source not found.**
5. Choose user's *Role*. The user's Permissions are defined within their Role
6. Press *Done*

IntelliSys Admin > Users Add Roles

Back Basic Information Add Permissions Done

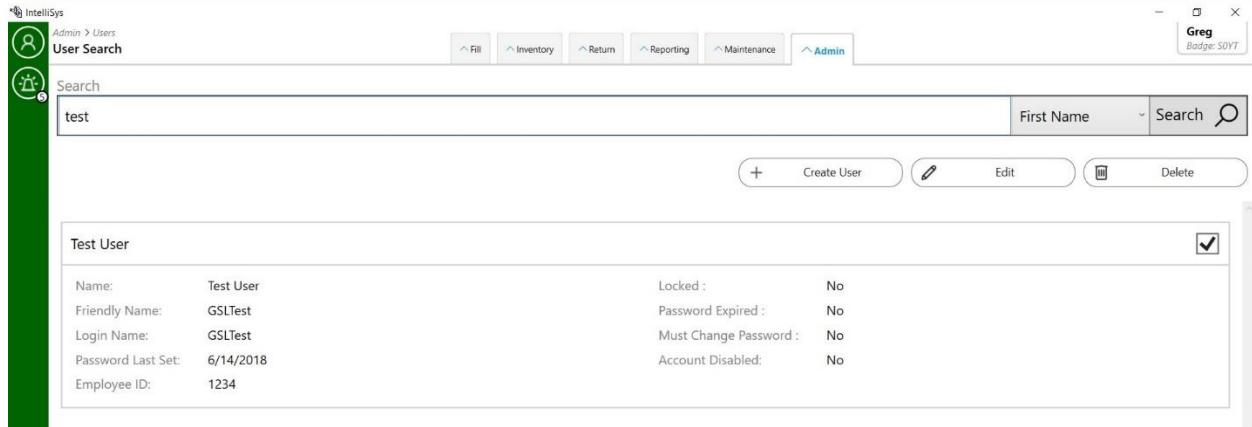
Add Roles to John Public:

Select All

Role	Sort
Administrators	Role
RPhs	
Supervisors	
Operators	
VaultTechnicians	
ExportTechnicians	
Fill Only Techs	
IntelliVault Manager	
IntelliVault user no WCC Permissions	

To edit users:

1. Press *Users* button
2. Enter user name and press *Search*
- Note:** To view all users, leave Search field empty and press *Search*
3. Press the check box to the right of the user's name
4. Edit the User's information and/or *Roles*
5. Press *Save*



IntelliSys Admin > Users User Search

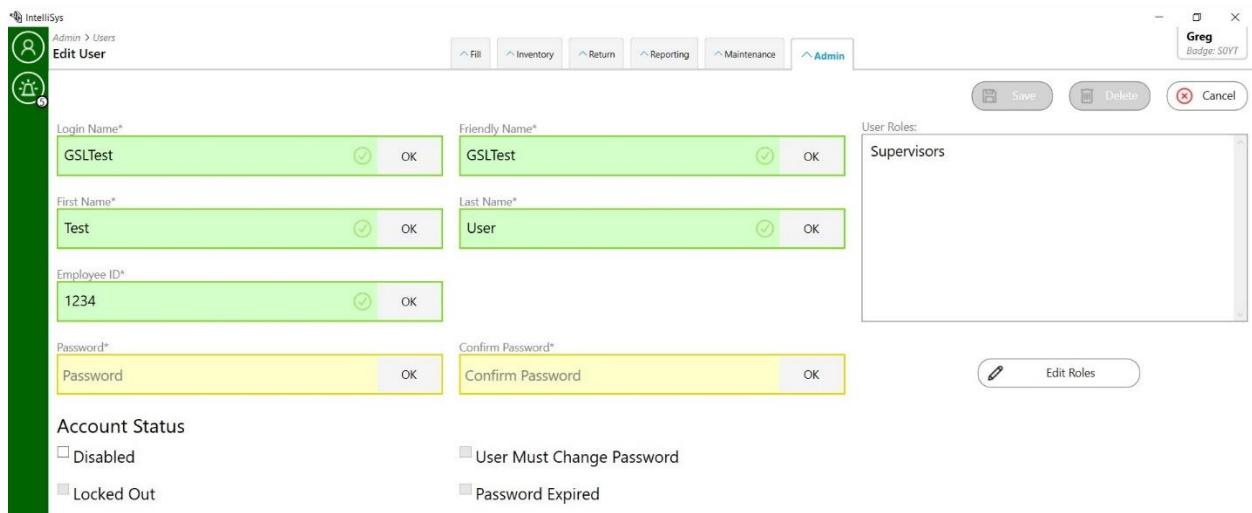
Search: test

First Name: Search

Test User

Name:	Test User	Locked:	No
Friendly Name:	GSLTest	Password Expired:	No
Login Name:	GSLTest	Must Change Password:	No
Password Last Set:	6/14/2018	Account Disabled:	No
Employee ID:	1234		

+ Create User Edit Delete



IntelliSys Admin > Users Edit User

Login Name*: GSLTest OK

Friendly Name*: GSLTest OK

First Name*: Test OK

Last Name*: User OK

Employee ID*: 1234 OK

Password*: Password OK

Confirm Password*: Confirm Password OK

User Roles: Supervisors

Account Status

Disabled

Locked Out

User Must Change Password

Password Expired

Save Delete Cancel

Edit Roles

Error! Reference source not found. to Manage User Roles

Each Role has certain permissions assigned to it

1. *Admin > Roles*
2. Press *Search* to view all Roles or type a Role name and press *Search*
3. Click the blue “xx Permissions” to view and edit Permissions. Descriptions are shown next to the Role name
4. When finished, press *Save*

The screenshot shows the 'Search Roles' page. At the top, there are navigation links for Fill, Inventory, Return, Reporting, Maintenance, and Admin. A user profile for 'Greg' is shown with a badge of 'SOYT'. Below the header, there is a search bar with a placeholder 'Search for a role' and a 'Search' button. A 'Create' button is also present. The main area is titled 'Available Roles:' and lists the following roles:

- Administrators**: Described as allowing any action on the system. It has 83 permissions and includes 'Delete' and 'Edit' buttons.
- BrokerUsers**: Described as the minimum role to access the gsl databases. It has 0 permissions and includes 'Delete' and 'Edit' buttons.
- Cashiers No Vault Access**: Described as allowing export functionality. It has 19 permissions and includes 'Delete' and 'Edit' buttons.
- ExportTechnicians**: Described as allowing export functionality. It has 3 permissions and includes 'Delete' and 'Edit' buttons.
- Fill Only Techs**: Described as Pharmacy Technicians allowed to export. It has 53 permissions and includes 'Delete' and 'Edit' buttons.

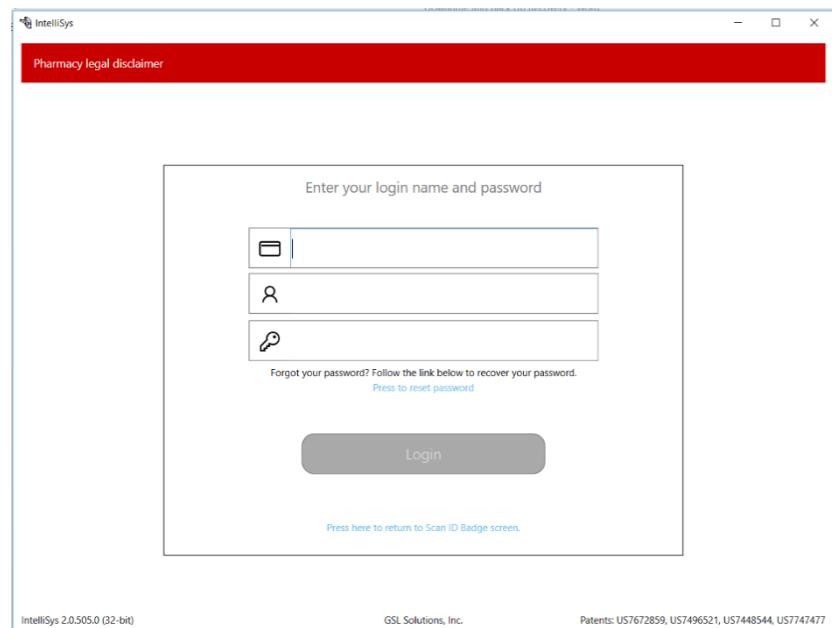
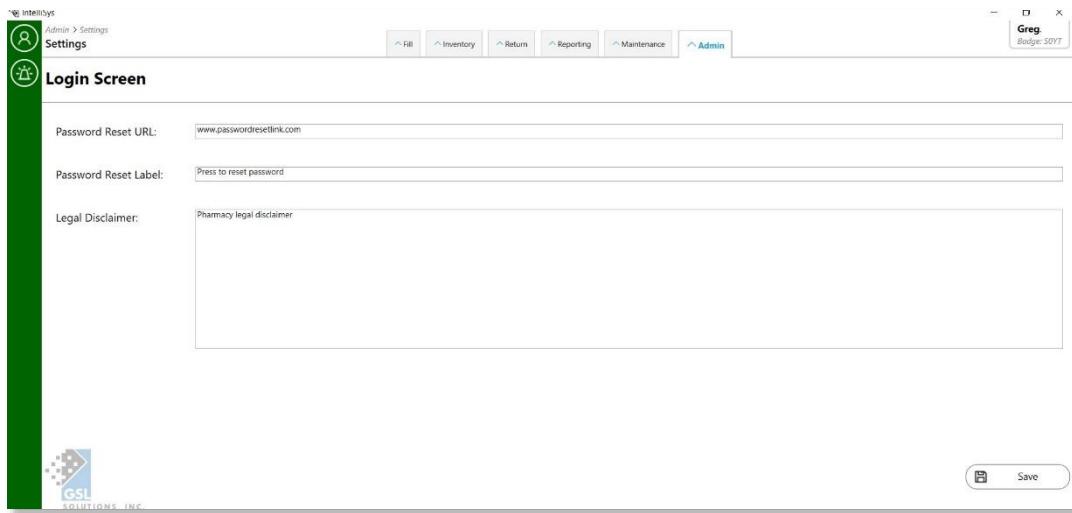
The screenshot shows the 'Add Permissions' page for the 'Administrators' role. At the top, there are navigation links for Fill, Inventory, Return, Reporting, Maintenance, and Admin. A user profile for 'Greg' is shown with a badge of 'SOYT'. A 'Back' button is available. The main area is titled 'Add permissions to Administrators' and includes a 'Save' button. A 'Filter Permissions' dropdown and a 'Permission Name' search bar are present. A list of permissions is shown with checkboxes:

- Workflows**
- Reports** Allows the user to navigate to the Reports screen.
- Inventory** Allows the user to navigate to the Inventory screen.
- Second User Demographics** Allows a process to ask for a second user as witness for an operation.
- Second User Double Count** Allows the user to navigate to the second user double count screen.
- Snooze Backup Recovery Shutdown** Allows the user to postpone a downtime recovery if this permission is enabled.
- Reopen Backup Recovery Operation** The user can reopen the last Backup Recovery operation.

Settings

Set legal disclaimers and password reset URL which will appear on login screen

1. *Admin > Settings*
2. Enter URL for password reset
3. Enter label for password reset (e.g. "Press to reset password")
4. Enter Legal Disclaimer
5. Press *Save*
6. Logout to see login screen with legal disclaimer and password reset URL



Downtime

Downtime Operations & Recovery

In the event that IntelliVault loses power and/or network, the first step is to print a copy of the *Downtime Prescription Locator Report and Stock Locator Report* (see following section for instructions on how to print these). A manager or RPh with the appropriate privileges will need to locate the key to the IntelliVault, unlock it and engage the lock override (pull handle).

- The baskets in any IntelliVault drawer that is opened during downtime are required to be back-counted upon recovery. Therefore only open drawers if necessary and use as few drawers as possible to do downtime fills.
- Do not receive new stock during downtime if at all possible.
- Do not fill ahead on IntelliVault drug prescriptions. Rather, fill and deliver to the patient as the patient arrives for pickup only.
- If the stock in basket goes to “0” during downtime, place the empty basket back in the original location inside the IntelliVault
- If a pill is dropped or broken, place it in an empty basket, fill out a Perpetual Log sheet and shelf it in the IntelliVault.

The following are the 7 IntelliVault conditions that can occur during downtime:

	Scenario (DT = Downtime)	Condition of Basket when power/network is restored
1	New basket with new stock received and placed in IntelliVault during DT; not used for Rx fills or used for Rx fills but has stock remaining after DT Rx fills	“Unknown contents”
2	New basket with new stock received and placed in IntelliVault during DT; used for Rx fills and inventory goes to “0” during DT Rx fills	“Unknown contents”
3	“Known” stock basket in IntelliVault; used for Rx fills but has remaining stock after DT	“Back count required”
4	“Known” stock basket in IntelliVault; used for Rx fills and goes to “0” stock during DT	“Back count required”
5	IntelliVault drawer opened during DT for any reason	“Back count required” (all known baskets in drawer)
6	“Known” basket outside of IntelliVault when system comes back online (in process fill).	“Claim Basket” (<i>Maintenance > Downtime Recovery</i>)
7	Dropped or damaged pill placed in new basket and IntelliVault during DT	“Unknown Contents”

Recovery Procedures

The following is the order that SmartBaskets should be addressed when power and network are restored to the IntelliVault:

1. *Claim Basket* list (*Maintenance > Recovery*)
2. *Unknown Contents* for stock received during downtime (*Inventory > Inventory*)
3. *Unknown Contents* for dropped or damaged pills during downtime (*Inventory > Inventory*)
4. Perform Data Entry using Downtime Perpetual Log sheets (*Maintenance > Recovery*)
5. Back Count SmartBaskets as needed (*Inventory > Inventory*)

Task Manager

Once IntelliSys is back online, the Task Manager (*Admin > Tasks*) will display a Downtime Recovery report task tile that will display all drawers that experienced downtime

Downtime Prescription Locator Report and Stock Locator Report

During Downtime, immediately print the *Prescription Locator* and *Stock Locator Reports*.

There are three different ways to access them:

A. Workstation

1. At workstation, navigate to *Documents > GSLFailSafeReports*

Note: There are separate files for the Prescription Locator Report and the Stock Locator Report.

The WillCall Client must have been logged in by the user on the workstation for the Prescription Locator Report to be current, therefore use a workstation that has been recently used.

2. Print both reports *GSL Prescription Locator* and *GSL Stock Locator*

Note: Check the time on the reports; some activity may have occurred during the interval between the report time and the time it was printed.

B. Flash Drive (not applicable to DoD)

1. Slide the CTS center printer tray forward
2. Unlock buttons and press to release CTS front cover, then tilt the cover forward
3. Remove flash drive from one of the servers and insert in a workstation that has Adobe Reader
4. File>Open>"drive": (e.g. D:)
5. If



a pop-up window appears with the message "Do you want to reformat this drive?" press "No" 6. Print

both reports *GSL Prescription Locator* and *GSL Stock Locator*

Note: Check the time on the reports; some activity may have occurred during the interval between the report time and the time it was printed

7. When finished, reinsert flash drive in the server from which it was removed

Downtime Binder

1. A binder with tabs A-Z will be provided.
2. In the event that the IntelliVault loses power and/or network, this binder will be used as a "Manual Perpetual Log" until both power and network are restored to the IntelliVault.
3. The binder will include blank Perpetual Log sheets (**Error! Reference source not found.**) that are to be used as basket-centric log sheets, meaning that each SmartBasket "touched" during downtime (filled from, new receipt, damage/dropped pill) will get a unique log sheet, but will be filed alphabetically by drug name in the Downtime Binder.
4. When an existing stock SmartBasket is used for a fill for the first time, a new Perpetual Log sheet will need to be filled out and filed in the binder. Any additional times that this SmartBasket is used will be an "entry" on that SmartBasket's Perpetual Log sheet. The Perpetual Log sheets are self-explanatory and need to be filled out with as much information as possible for the given drug.

Note: The SmartBasket name is the 4-character "friendly name", in the SmartBasket illustrated, the friendly name is "5MES"

5. When a SmartBasket is used for the first time to receive new stock, a new Perpetual Log sheet will need to be filled out and filed in the binder. This SmartBasket can be placed in any empty slot in the IntelliVault (note the drawer and cell on the Perpetual Log sheet).



C2 Down Time Perpetual Log Page _____ of _____

Receipt #:	Invoice #:		Date:	
Drug Name/Strength/Form:	Qty on Receipt:		Received by:	
NDC Number/Manufacturer:	Lot #:		Expiration Date:	
SmartBasket Name:	IntelliVault Drawer #:		IntelliVault Cell #:	
RxLabel	Rx QTY	Stock Bottle Back-count QTY	RPh Initial	DT Recovery Completed By

Downtime Perpetual Log

Downtime Stock Receive

Note: Do not receive new freight during downtime if at all possible. Otherwise, use the following steps:

A. Receive Stock

Tech

1. Start PMS Receiving
2. Stock arrives; CII's separated by Supplier
3. Scan each item into PMS to verify receipt
4. Verify received stock vs Supplier invoice. Note on Supplier invoice for stock received

RPh

1. Verify receipt of meds vs. invoice (sort by NDC/Exp/Lot)
2. Print or gather DEA222 from CSOS and attach to Supplier invoice

B. IntelliVault Receiving

1. Locate GSL-provided Downtime Recovery binder
2. Sort freight by NDC, then by Lot # and Expiration Date
3. **Best practice:** Remove stock bottle caps to determine sealed bottles for faster counting
4. Place stock bottle(s) into SmartBasket. Use a separate SmartBasket for each NDC, Exp and Lot #

Note: Complete a separate Downtime Perpetual Log sheet for each SmartBasket

Note: Enter Qty on receipt for stock bottle

Note: Repeat steps for each SmartBasket used

Note: Enter on the Supplier invoice "Received during Downtime"

C. Shelving into IntelliVault

Note: IntelliVault should be manually unlocked and locked for shelving stock SmartBaskets, as required

1. As each SmartBasket is shelved in IntelliVault, record the drawer location on that basket's Perpetual Log sheet
2. Perpetual Log sheets are placed alphabetically in Downtime binder

Recovery from Downtime

Recovery Rx Fill and Dispense

1. Locate Downtime binder
2. Grab **Error! Reference source not found.** sheets
3. *Maintenance > Recovery*
4. Select SmartBasket from drop-down or type SmartBasket 4-character name ("5MES" in illustration)
5. Enter Rx information in each field
6. Select user who dispensed Rx
7. Initial each line on the DT Perpetual Log sheet
8. Press "Finish Recovery" when completed with ALL entries for ALL SmartBaskets. If "Finish Recovery" is not pressed an alert "Shutdown Mode" will appear. Navigate to *Maintenance > Recovery*, Press *Finish Recovery*
Note: Best practice is to have 1 or 2 people perform this task so that stock SmartBaskets can be reconciled as quickly as possible



When attempting to use a SmartBasket to fill prescriptions after DT, once the Rx label is scanned the following conditions may occur:

1. **Back-count required alert:** Perform Back-count on Stock SmartBasket
 - a. **Back-count correct** = SmartBasket is ready for use
 - b. **Back-count incorrect (on first attempt)** = STOP and locate DT Perpetual Log for SmartBasket
 - i. Verify if the "Backup Recovery" fills have been input. If not, enter the fills and then attempt to complete new Rx fill. If the fills have been input, an Inventory Adjustment will need to be made with the reason: "Count Discrepancy"

Recovery Dispense

1. Navigate to *Maintenance > Recovery*
2. Grab Downtime Perpetual Log sheets
3. Select SmartBasket from drop-down
4. Enter Rx information
5. Select user who dispensed Rx and press OK

Recovery Stock Receive

A. **Retrieve "Unknown Contents" Stock SmartBaskets**

1. Gather any Supplier invoices and DEA222 forms
2. Locate Downtime Binder
3. Compare the DEA222 forms with the Perpetual Log sheets to verify the Stock SmartBaskets that were shelved during Downtime

To find Downtime Receiving Stock SmartBaskets in IntelliVault:

- a. Navigate to Admin > Tasks
- b. *Filter > Category*, choose *Backup Recovery*, press *Add*

- c. To filter by New or In Progress items: *Status > Not Started and/or In Progress*, press *Add*
- d. Press *Search*
- e. Select SmartBasket (one at a time) and press *Pull*

B. Receive Stock in IntelliVault

1. When stock SmartBasket is retrieved, navigate to *Inventory > Receive*
2. Perform normal Stock Receive function using DT Perpetual Log sheets
Note: Each “Basket with Unknown Contents” must be reset. Place on IntelliPad and press *Reset Basket* button (must have User Permission)
3. Confirm the invoice receipt Qty with the Qty on the DT Perpetual Log
4. Initial the Perpetual Log sheet for each SmartBasket that has been recovered
5. Repeat Steps 1-4 for all baskets that were received during DT
6. Press *Complete Invoice*
7. Press *Finalize*

C. Fills from New Receiving

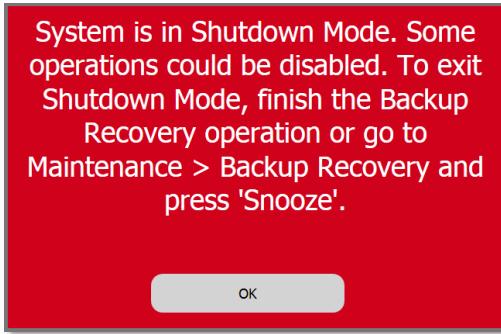
1. Follow Recovery Rx Fill and Dispense to decrement Rxs filled during DT
2. Once Recovery Stock Receive and Recovery Prescription Fill functions are completed, shelve basket in IntelliVault
Note: If a stock basket goes to “0” after the fills have been entered from the DT Perpetual Log sheet, the system should recognize the basket as “empty”
3. Print Stock Receive Report (*Reporting > Reports*)
4. Reconcile Stock Receive Report with DEA222 and Supplier invoice and file accordingly.

[Recovery Notes & Reports in Task Manager](#)

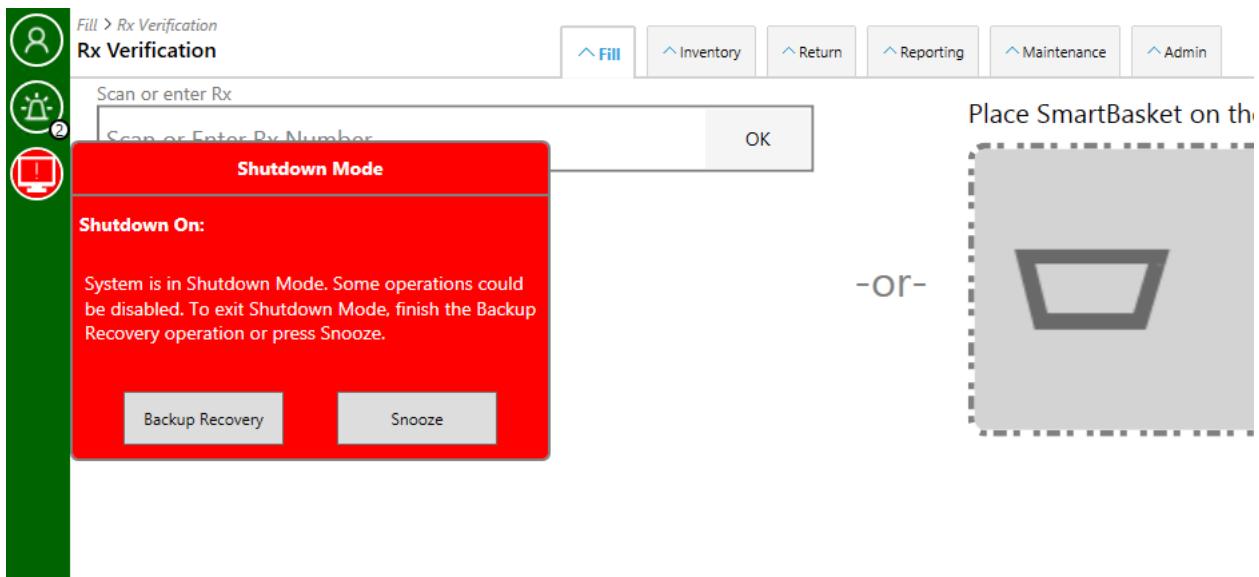
1. Navigate to *Admin > View Pending Tasks*
2. Filter by *Category (Downtime)*, press *Add* and then press *Search*
3. Depending on the “task”, a manager will either need to review and *Finish* the task (System Down or Drawer Down reports) or a technician will need to perform an action such as back-count baskets.

[Shutdown Mode](#)

Shutdown Mode occurs once the system is back online after Downtime and there are baskets to claim. This alert banner is displayed on all IntelliVault workstations. **Complete Steps A and B** below to complete recovery.



To delay Shutdown Mode until recovery has taken place, press the monitor icon in the status bar, then press *Snooze*.



Note: If this alert occurs you may press “Snooze” to delay action (must have Permission). However the alert will appear again until Backup Recovery is completed and “Finish Recovery” is pressed.

A. *Maintenance > Downtime*

1. Claim SmartBaskets that were removed during Downtime