GSL SOLUTIONS, INC.
"....the Leader in RFID Pharmacy Technology."

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.

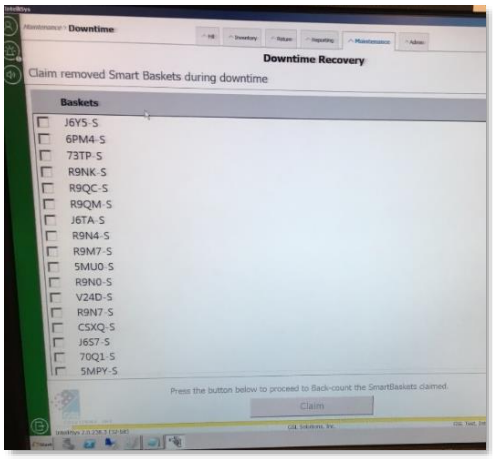
French

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.

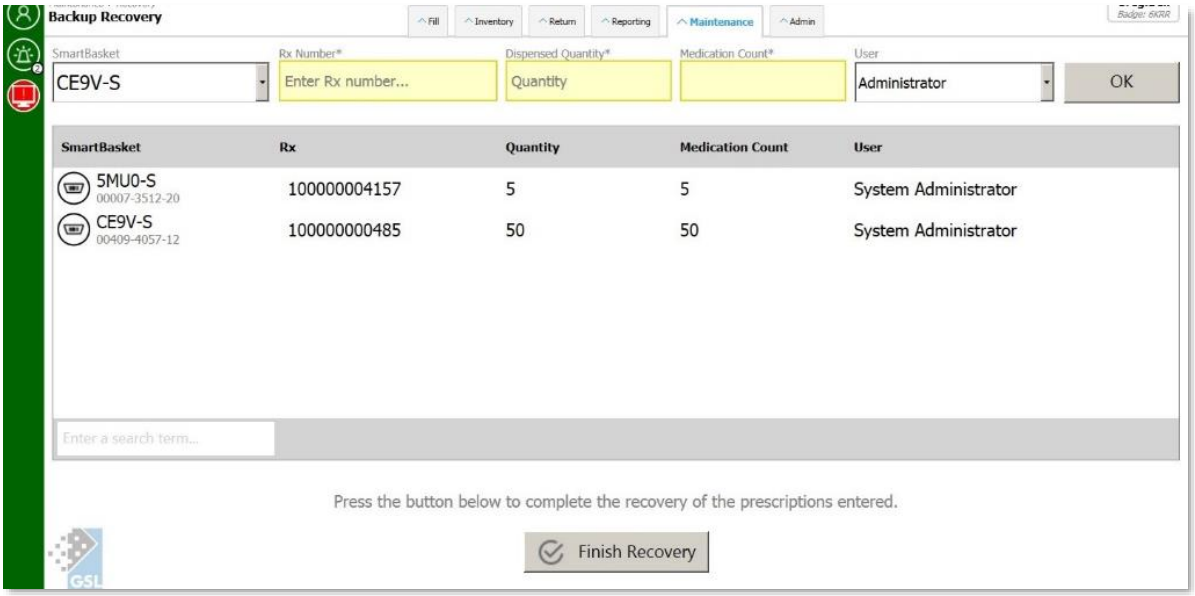
Cet appareil est conforme aux normes RSS exemptes de licence d'Industrie Canada. Son fonctionnement est soumis aux deux conditions suivantes: (1) cet appareil ne doit pas provoquer d'interférences, et (2) cet appareil doit accepter toute interférence, y compris les interférences susceptibles d'entraîner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

1. that were removed during Downtime
2. Press *Finish Recovery*



B. ***Maintenance > Recovery***

1. Locate Downtime binder
2. Grab Downtime Perpetual Log sheets
3. *Maintenance > Recovery*
4. Type SmartBasket name or select from drop-down
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
   Note: Best practice is to have multiple people perform this task so that stock SmartBaskets can be reconciled as quickly as possible



Cleaning GSL baskets, lids, and peripheral equipment

GSL SmartBaskets, lids, scanners, IntelliPads, and signature capture pads may be cleaned with any type of sanitizing wipe.

Cleaners using quaternary ammonium are acceptable provided the device is wiped, not flooded.

Do not spray sanitizing solution directly on scanners, IntelliPads, and signature capture pads. Spray the solution on a cloth, then wipe the equipment.

Do not submerge any of the items.

All items may be cleaned daily or as frequently as necessary.

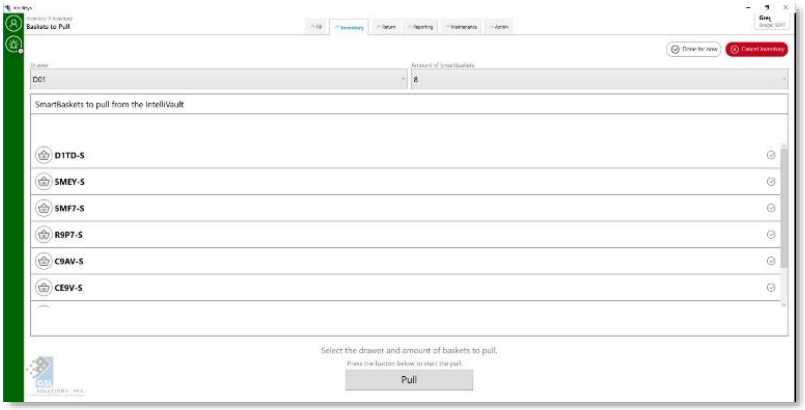
FAQ

A. Why is an LED for an IntelliVault cell blinking?

If the LED is blinking **yellow**, the SmartBasket above the LED needs attention. A blinking **red** LED indicates that a SmartBasket was pulled without authorization. The basket may be pulled from the drawer without an alarm.

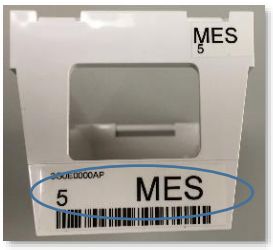
1. Remove the SmartBasket from the IntelliVault and place on the IntelliPad
2. *Inventory > Take Ownership*
3. *Inventory > Verify*
4. Verify the NDC, Qty, Lot, and Exp
5. Shelve in the IntelliVault

B. What do I do if I have an Unknown Contents Stock SmartBasket?



1. Navigate to *Inventory > Inventory*
2. Press *Unknown Contents*
3. If a second person will participate in the inventory operation, press Yes and they scan their badge or manually enter their demographics
4. Choose SmartBasket(s), press *Pull*
5. Retrieve SmartBasket(s) from IntelliVault
6. Navigate to *Inventory > Take Ownership*
7. Place SmartBasket on IntelliPad
8. Press Reset Basket (must have user permission)

C. How do I take ownership of a SmartBasket?



1. Place SmartBasket on IntelliPad (or scan or manually enter 4-character name. “5MES” in illustration)
2. Navigate to *Inventory > Take Ownership*

D. How do I fix a Mis-coupling Error?

1. Press *OK* to clear error message
2. RPh: Place the SmartBasket on the IntelliPad and press *Reset Basket* (must have User Permission)
3. Scan the Rx label
4. Place the Rx into the SmartBasket and put a lid on it
5. Place a new SmartBasket on the IntelliPad and scan the Rx label for the second patient (Steps 3 and 4)
6. Navigate to F1 *Entry* screen and verify that no mis-coupled Rxs are in the *No Baskets* field
7. To delete a mis-coupled error, double-click on it in the *No Baskets* field (with no SmartBasket on the IntelliPad). Once the Rx is in the *Associated Items* field, press *Remove all items from system*

E. How do I return a prescription to stock?

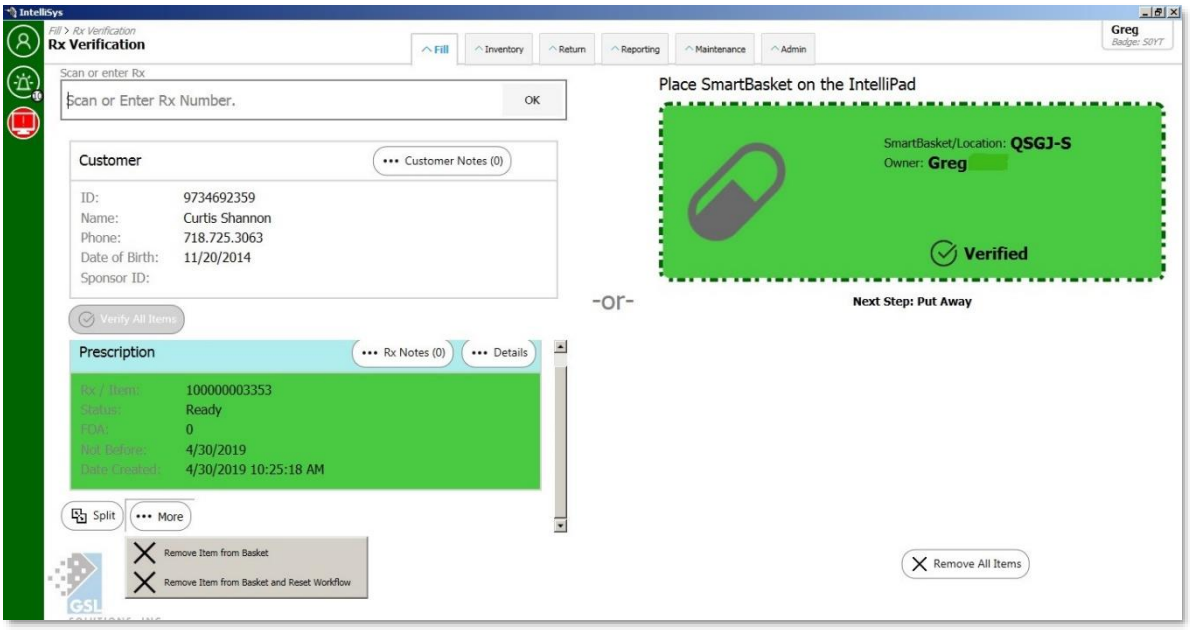
Error! Reference source not found.. Press Ctrl+Click to view this section

F. How do I Back-count liquid medications?

Liquid medication Back-counts have a certain tolerance. Estimate the remaining contents for the Back-count (for all bottles in the stock SmartBasket). If the Back-count is outside the tolerance, an **Error! Reference source not found.** will be required.

G. How do I transfer a prescription to a different SmartBasket?

1. *Fill > Rx Entry*
2. Place SmartBasket on IntelliPad
3. Scan Rx number or manually enter
4. Press *Remove All Items* or press *More > Remove Item from Basket*
5. Place new basket on IntelliPad
6. Scan Rx number or manually enter



Next step: RPh Verify

7. *Fill > Rx Verification*
8. Place coupled Rx SmartBasket on IntelliPad
9. Double-count the Rx and press *OK.* Basket highlighter will turn green
10. RPh places lid on SmartBasket and shelves in WillCall IntelliCab
    Note: The person who verifies the SmartBasket must shelve it

H. How do I transfer contents to a different SmartBasket?

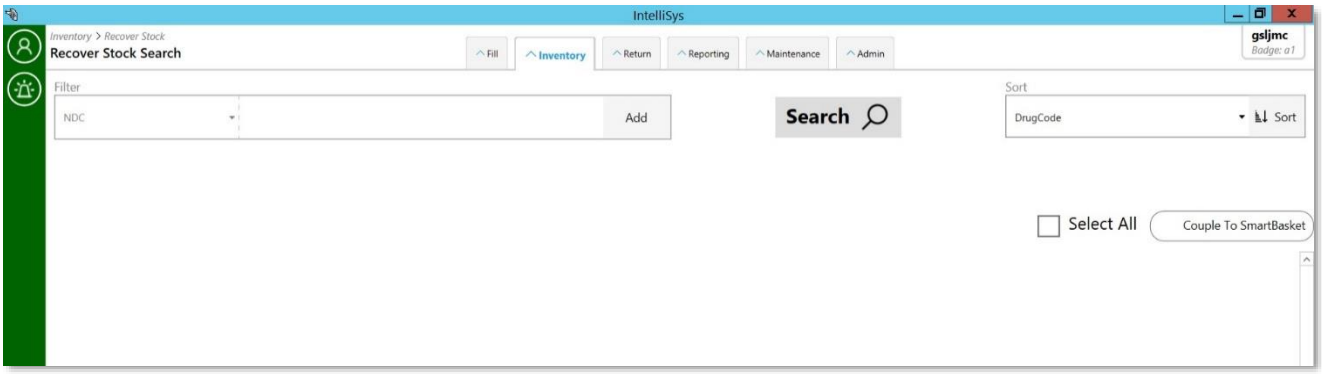
1. Press the *Transfer Contents* button on the SmartBasket widget
2. Place a new SmartBasket on the IntelliPad and press *Done* to complete the transfer
   Note: Press *Cancel* to cancel the transfer

I. How do I recover "Stock in Unknown State"?

This occurs as a result of a mis-coupling error

3. Navigate to *Inventory > Recover Stock*
4. Press *Search* to locate all items or Filter by category
5. Place SmartBasket on an IntelliPad

6. Press *Couple to SmartBasket*
   Note: if the stock is gone (e.g. dispensed), couple it to a basket at 0 (zero) and do an **Error! Reference source not found.**. The "zeroed" SmartBasket may be placed back in circulation (not

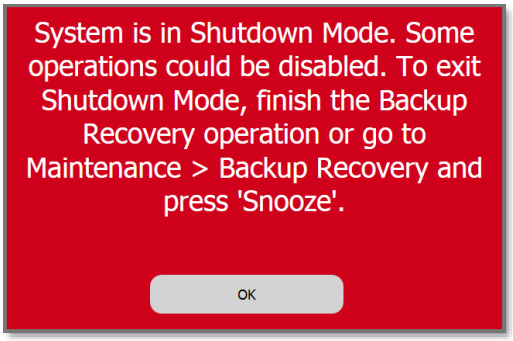


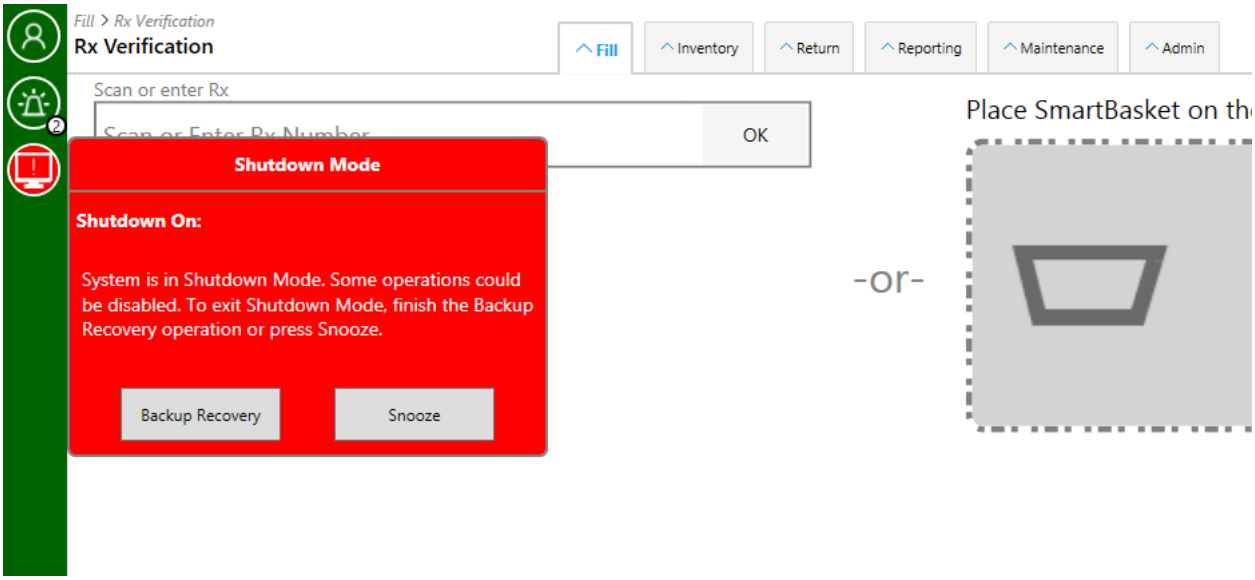
in IntelliVault)

J. There is a Shutdown Mode alert on the screen

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. Refer to the **Error! Reference source not found.** section.

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





K. The IntelliPad is not working properly

Refer to Appendix B

USB IntelliPad

L. The drawer makes an "uh-uh" sound when I authenticate

1. Ensure that you are logged in to IntelliSys
2. If you are logged in, you are not authorized to open the drawer.
    a. If you have an active pick light on your workstation, check that you are the user who is logged into that workstation. If not, cancel the pull and log in to restart the pick operation.
    b. The person who verifies contents of a basket is authorized to shelve it

M. How do I do a Partial Fill?

1. For **partial fills**, either:
    a. Change the quantity in the pharmacy management system and generate a new Rx label, or
    b. Perform an Inventory Adjustment
        1. Navigate to *Inventory* > *Inventory*
        2. Select Inventory Type 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: Press *Cancel* to cancel the transfer
        7. Press *Adjust Inventory*

8. Choose *Single Adjustment*
9. Choose *Adjustment Type* from drop down
10. Enter required information in *Notes* field, including Rx number, “partial fill”, and any other relevant information

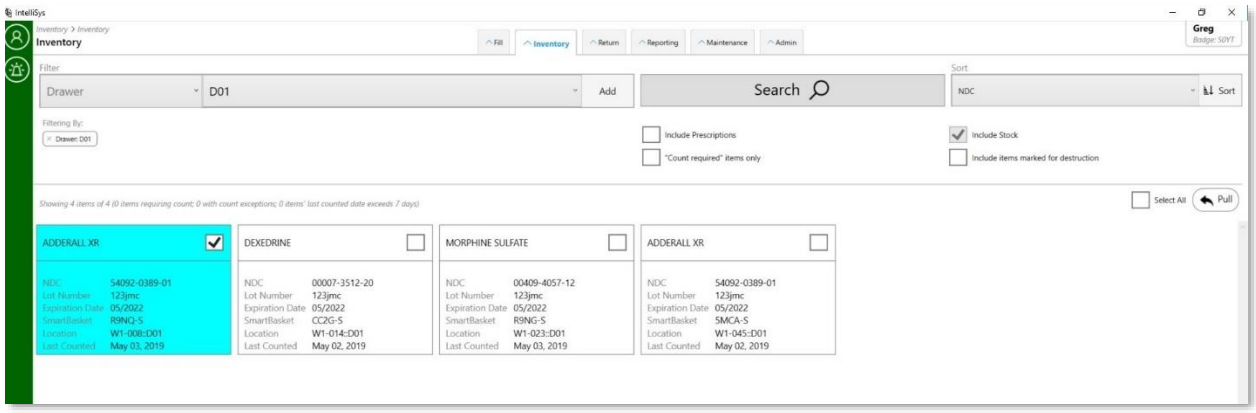
Note: Make simultaneous adjustments in PMS if applicable.

11. Place lid on SmartBasket and shelve into IntelliVault

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)*

N. How do I Cancel a Fill?

You may cancel a fill at three different points in the fill process:



1. Once the Rx has been scanned for a fill, but before the stock basket has been pulled, press *Cancel Pull*
2. Once the stock basket has been retrieved from IntelliVault, press *Cancel Fill*, then enter the back count, and return the stock basket to IntelliVault. The Perpetual Log will display the prescription as “Return to Stock” and not as “Cancelled Fill”.
3. After the stock basket has been retrieved, the Rx quantity is removed from the stock basket and coupled to a different basket, and the stock basket has been returned to IntelliVault, press Cancel Fill. The basket will be converted to stock, simply shelve it in IntelliVault. The Perpetual Log will display the prescription as “Return to Stock” and not as “Cancelled Fill”.

O. How do use IntelliVault if the lock isn’t opening?

IntelliCab Mode – Using IntelliVault if there is a problem with the lock controller

If there is a problem with the lock controller, IntelliVault may be used in IntelliCab Mode.

1. Simply insert the key and activate lock override by pulling the handle out

2. Use the IntelliVault client as normal, when you get a pick light, badge in and pull the drawer open, then retrieve the basket.

Note A: The pharmacy may operate in IntelliCab Mode until the lock controller is fixed.

Note B: They may re-lock the IntelliVault between operations if they want to, and should relock cabinets at night.

Note C: No downtime recovery operation is required.

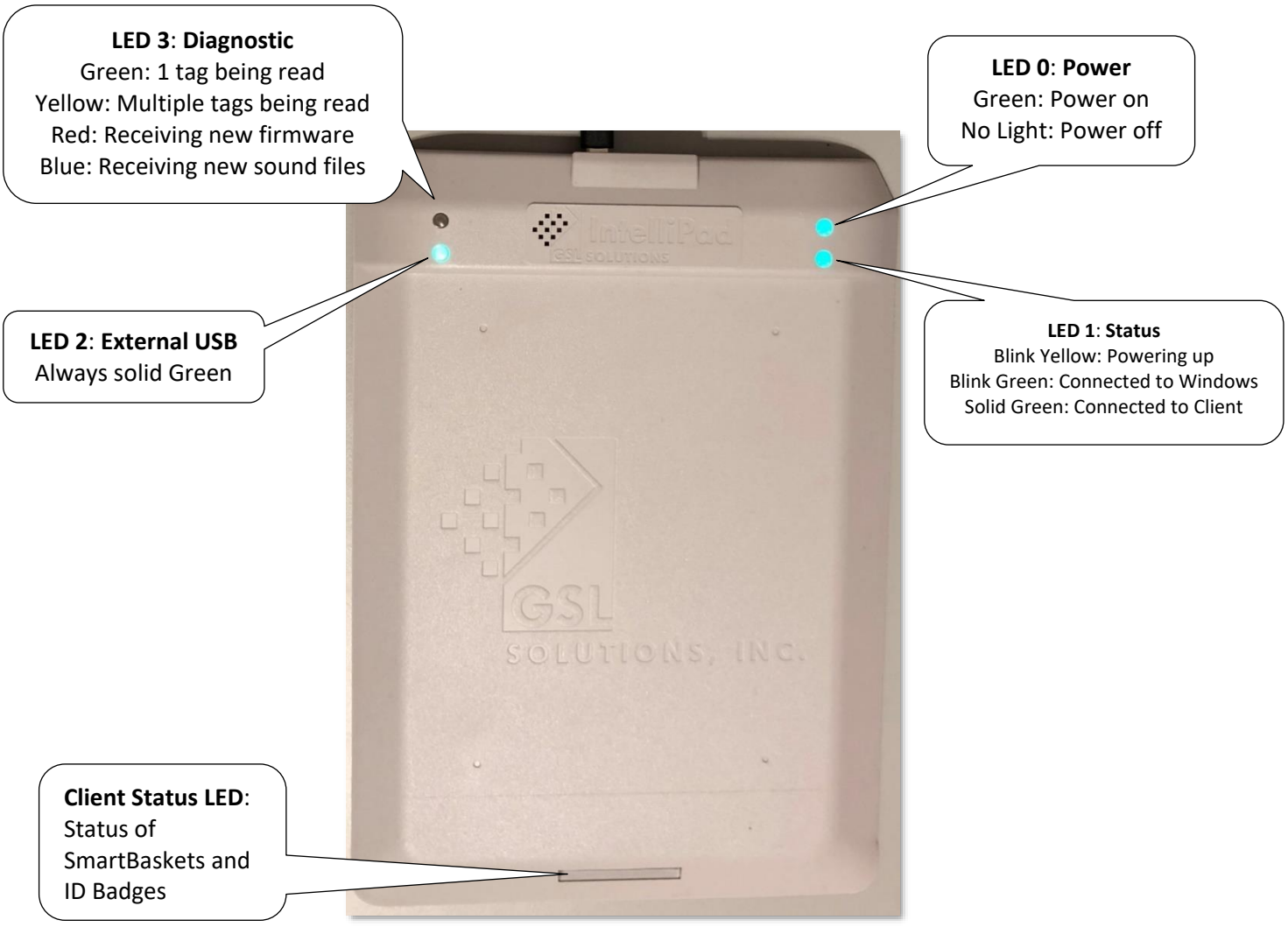
Note D: If an open drawer loses power/network while the cab is in IntelliCab Mode, the entire drawer must be recounted. This only applies if the drawer is open. If the drawer is closed, even in IntelliCab mode, a recount is not required.

Appendix A

Downtime Perpetual Log

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

USB IntelliPad



IntelliPad Status LED	IntelliVault	WillCall Client
Off	No ID Badge or Basket present	No ID Badge or Basket present Unknown Contents Basket
Yellow	Empty Basket	
Green Solid	Basket contents verified, ready to be shelved New unknown RFID tag	Basket contents verified, ready to be shelved New unknown RFID tag Empty Basket
Green Blinking 1 sec	Pad not reading well	Pad not reading well
Red Solid	Basket with unknown contents Coupling error Invalid RFID tag Multiple tags on/near pad	Basket with unknown contents Coupling error Invalid RFID tag Multiple tags on/near pad
Red Blinking 0.5 sec	Basket contents requiring verification	Basket contents requiring verification Basket containing stock cannot be used to couple a prescription
Blue Solid	ID Badge (Activated)	ID Badge (Activated)

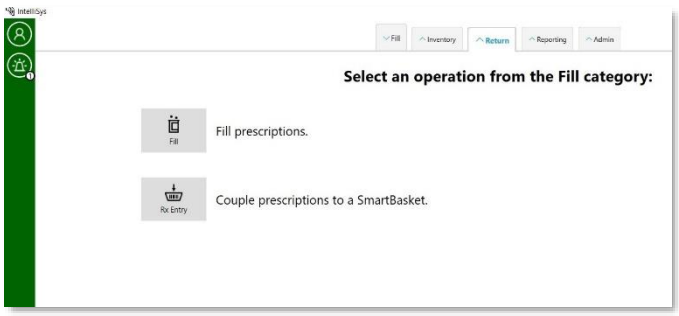
Troubleshooting USB IntelliPad

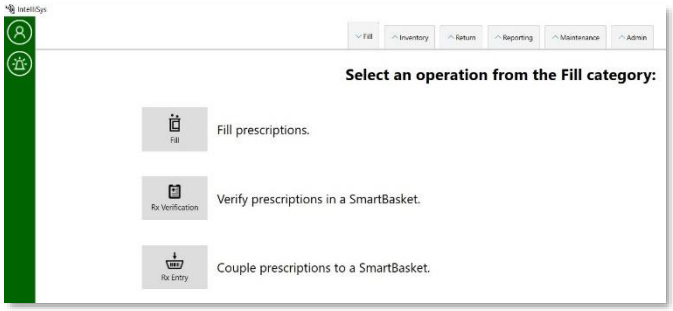
1. Error message: "IntelliPad Is Not Responding": Check that **there are not multiple RFID tags** (SmartBaskets or ID Badges) near the IntelliPad, including underneath the counter. Also check that there is **no metal underneath the counter**.
2. Unplug the micro-USB cable from the IntelliPad and re-seat it in the plug
3. Verify IntelliPad LED status. (See illustration of LED indicators above)
   - **a. If LED #1 is**
     - i. On Solid = Normal Operation
     - ii. Blinking Green = Attached to Windows but not attached to the GSL client (IntelliSys or WillCall Client)
       1. Confirm that the GSL client is currently open
       2. If already open, close and re-open the GSL client, wait 30-60 seconds
     - iii. Blinking Yellow = Powering up, not attached to Windows
       1. If new workstation and OS older than Windows 10, call Local IT to install WINUSB drivers
       2. Unplug USB cable at IntelliPad and plug back in
       3. LEDs should cycle
     - iv. Still blinking yellow
       1. Move USB cable to another port on back of workstation
     - v. Still blinking yellow
       1. Swap just the IntelliPad with a known working IntelliPad from another workstation
       2. Wait 30-60 seconds
       3. If problem stays at original workstation, it is either a cable issue or workstation issue
          - a. Swap cables to verify if the issue stays with the USB Cable or the workstation
            - i. If it stays will the cable, call GSL Support for replacement cable
            - ii. If it stays with the workstation, call Local IT to uninstall and re-install WINUSB drivers
       4. If problem follows the IntelliPad
          - a. Unplug USB cable and plug back in, wait 30-60 seconds.
          - b. If it is still not working, call GSL Support for replacement IntelliPad
   - **b. If no LEDs:**

i. Check connections at both ends of USB cable
    1. Move USB cable to another port on back of workstation
ii. Still no LEDs
    1. Swap just the IntelliPad with a known working IntelliPad from another workstation
    2. Wait 30-60 seconds
    3. If the original IntelliPad starts working but the one moved to the original workstation does not
        a. Call GSL Support for a replacement USB cable
    4. If the original IntelliPad does not work on moved-to workstation
        a. Call GSL Support for a replacement IntelliPad

User Permissions

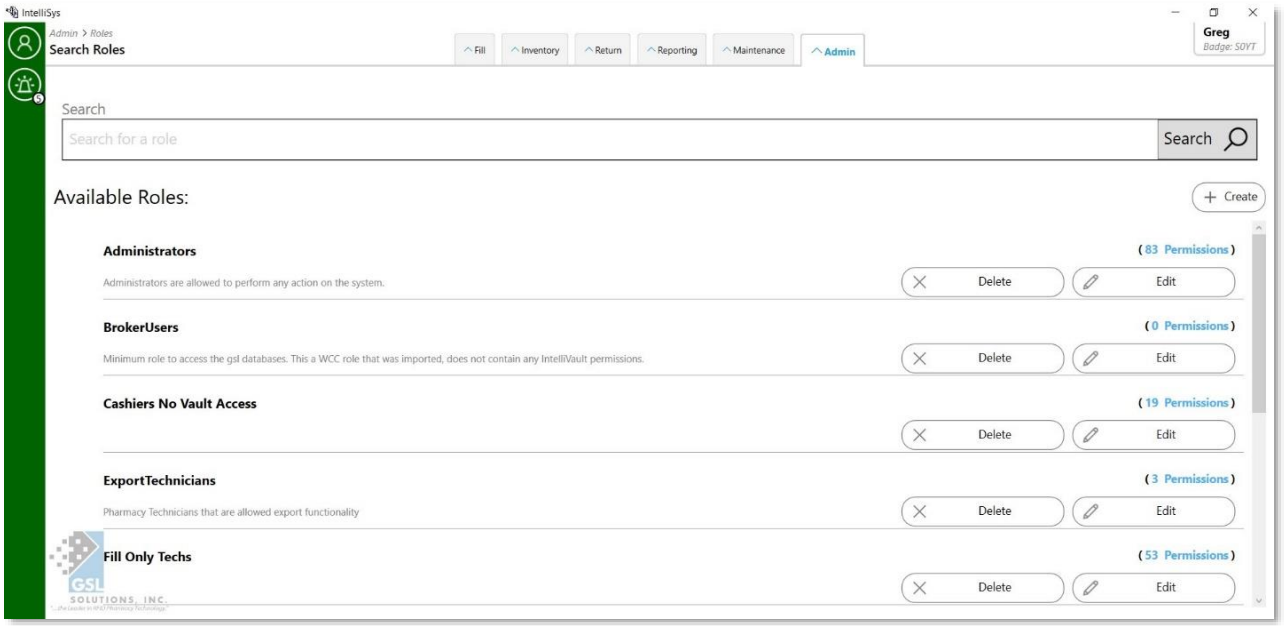
Each role has a set of User Permissions which allows appropriate access to IntelliSys. In certain operations, actions will be visible only to users whose roles have the appropriate Permissions; in other operations where the action is visible, only users with appropriate Permissions are allowed access to the action.





To Manage User Roles – Each Role has certain User Permissions assigned to it:

1. Navigate to *Admin > Roles*
2. Press *Search* to view all Roles or type a Role name and press *Search*
3. Please contact GSL to change Permissions


IntelliSys
Admin > Roles
Search Roles
Fill
Inventory
Return
Reporting
Maintenance
Admin
Greg
Badge: SOYT
Search
Search for a role
Search
Available Roles:
Create
Administrators
(83 Permissions)
Administrators are allowed to perform any action on the system.
Delete
Edit
BrokerUsers
(0 Permissions)
Minimum role to access the gsl databases. This a WCC role that was imported, does not contain any IntelliVault permissions.
Delete
Edit
Cashiers No Vault Access
(19 Permissions)
Delete
Edit
ExportTechnicians
(3 Permissions)
Pharmacy Technicians that are allowed export functionality
Delete
Edit
Fill Only Techs
(53 Permissions)
Delete
Edit
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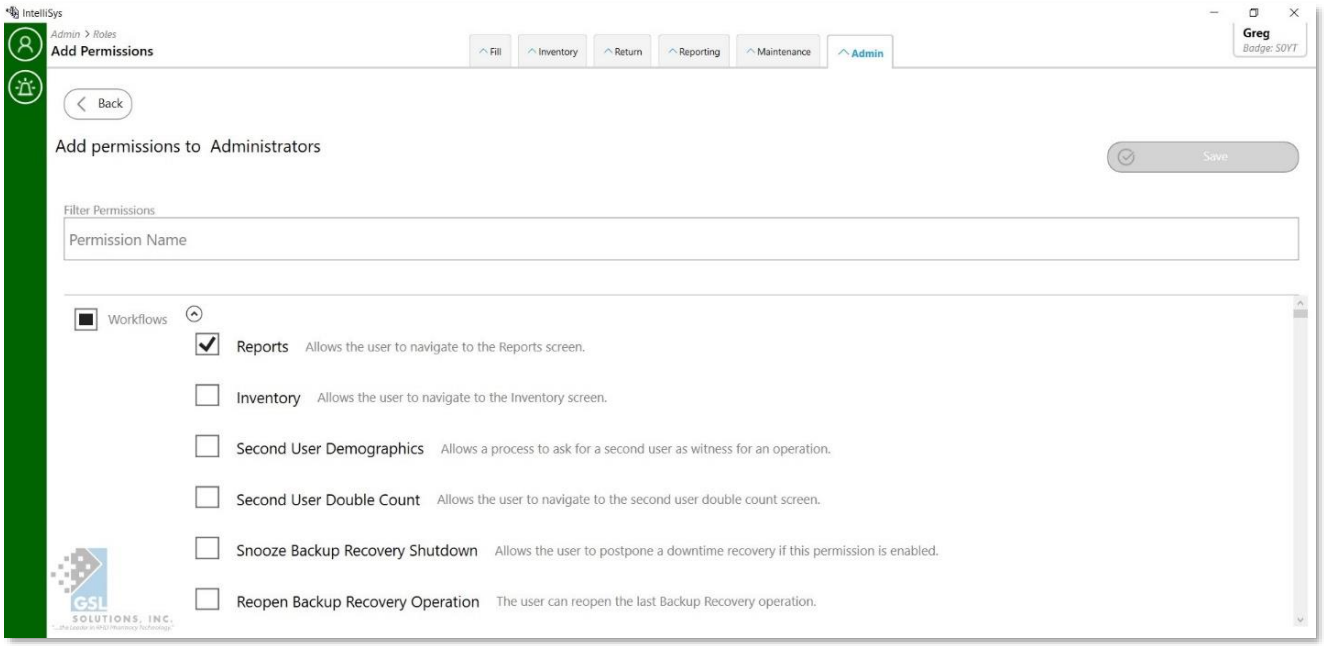
IntelliSys
Admin > Roles
Add Permissions
Fill
Inventory
Return
Reporting
Maintenance
Admin
Greg
Badge: SOYT
Back
Add permissions to Administrators
Save
Filter Permissions
Permission Name
Workflows
Reports
Allows the user to navigate to the Reports screen.
Inventory
Allows the user to navigate to the 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.
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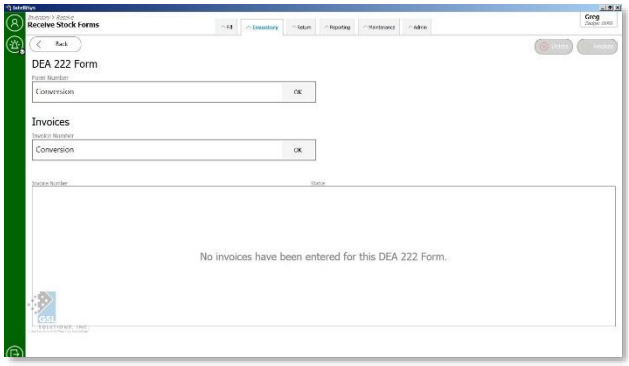
Appendix D

Conversion of Stock and Prescriptions to IntelliVault

Prior to IntelliVault Installation:

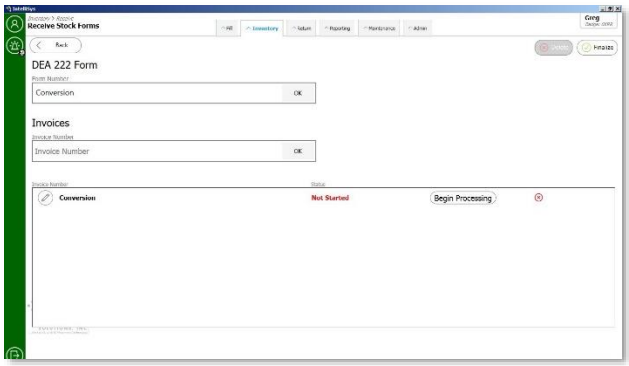
1. ***Process all vendor returns, recalls, broken & dropped medications, etc prior to IntelliVault installation***
2. Print Pharmacy Management System Inventory Report
3. Perform physical inventory and reconciliation
4. Remove all stock inventory and place in a secure location
   Note: Items need to be sorted by NDC, Expiration and Lot for conversion to IntelliVault
5. Remove legacy cabinet(s)
6. Install IntelliVault cabinet(s)

Initial Stock Receive (Legacy Conversion)



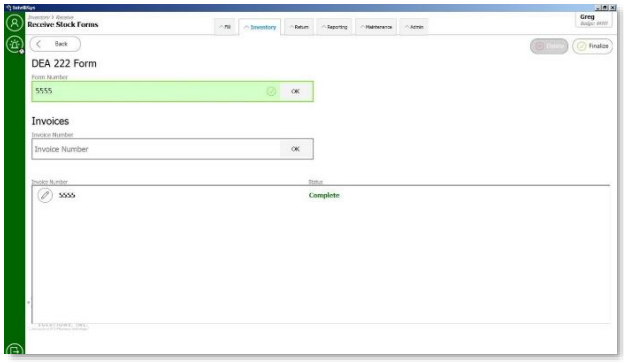
User #1:

1. Launch IntelliSys application
2. *Inventory > Receive*
3. Select *New Order*
4. Type “Conversion” for the DEA 222 and press *OK*
5. Enter Julian date for the Invoice # and press *OK*
6. Select *Begin Processing*
   Note: Do not finalize conversion receiving before all stock has been received
7. Place basket on IntelliPad
8. Scan NDC barcode stock bottle(s) and place in SmartBasket
   Best practice: Remove stock bottle caps to determine sealed bottles. Keep the lid on the open bottle for each SmartBasket.
9. Enter total QTY, Lot# and Exp
10. Place lid on SmartBasket
11. Shelve in appropriate-size IntelliVault drawer



Note: Use multiple baskets for fast movers

Each additional User:



1. *Inventory > Receive*
2. Select *Past Order*
3. Select *Search*
4. Select the *In Progress* Conversion Invoice
5. Proceed with receiving stock as shown in the steps for User #1

Note: **DO NOT** create more than one Conversion invoice. Follow the steps above.
Note: User #1 presses *Complete* and then *Finalize* after the last SmartBasket has been shelved in the IntelliVault. a Stock Receive report will be generated (*Reporting>Reports*).

When conversion is complete review/match IntelliVault Stock Receive report with PMS Inventory Report.

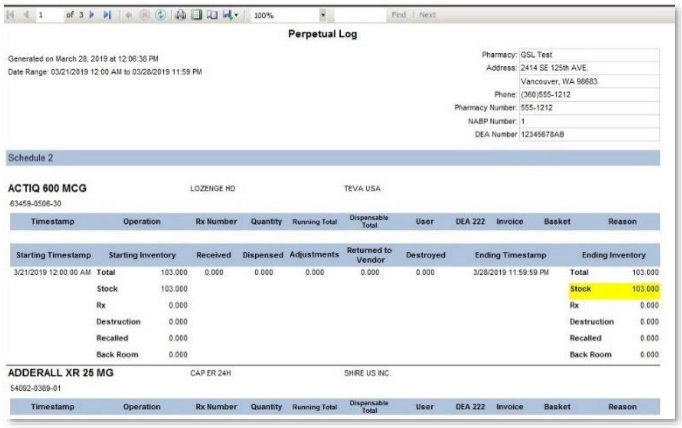
Return to Stock Controlled Rxs that are in IntelliCab prior to Conversion

1. In **WillCall Client**, navigate to RTS tab (F4)
2. Press *Aged and Non-Dispensable* and select the controlled Rxs to RTS
3. Press F12 or *Pull*
4. Authorized user retrieves all highlighted SmartBaskets from IntelliCab
5. Remove Rx from SmartBasket and scan Rx barcode into pharmacy management system to update pharmacy management system
6. Blackout HIPAA info on Rx bottle
7. Exit out of **WillCall Client** and then log into **IntelliSys**
8. Navigate to *Inventory > Receive*
9. Press *New Order*
10. Type in "Pre Conversion RTS Rx" for both the *DEA 222 Form Number*, *Invoice #,* and Lot # and press *OK* for each
11. Press *Begin Processing*
12. Place SmartBasket with Rx on IntelliPad
13. Manually type in the NDC and press *OK* (must be performed twice)
14. Type in QTY and press *OK*
15. If LOT is available, type in and press *OK*. If not, type "a" and press *OK*
16. Type in Expiration Date and press *OK* (this should be on the Rx label)
17. Place a lid on the SmartBasket
18. Repeat steps for each Rx that is RTS'd
19. Once all Rxs are "received", shelve SmartBaskets into IntelliVault
20. Press *Complete* and press *Finalize* to complete invoice

Appendix E

Perpetual Log Binder

A binder with tabs 1-31 and January-December will be provided


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
63459-9506-30

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	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

<u>At the end of each day</u>, print the IntelliVault Perpetual Log for that day (*Reporting > Perpetual Log Report*) and file in the binder for the corresponding day of the month. For the first week or two, include the PMS Inventory Report as well.

<u>At the end of each month</u>, print the IntelliVault Perpetual Log for that entire month's date range and file in the corresponding month tab. At this point, remove each of the daily Perpetual Logs from the binder and discard in accordance with pharmacy best practices.

IntelliVault Daily Checklist

☐ *AFTER STOCK RECEIVE:*

Stock Receiving Reconciliation - Validate that all documents are accounted for and properly filed:

1. DEA 222
2. Supplier Invoice
3. IntelliSys Stock Receive Report

☐ *THROUGHOUT THE DAY:*

Error! Reference source not found. – The following are common tasks (or "tiles") that will either require you to review and/or address with an action

1. **Stock Receive Report** – Appears after you finalize a *Stock Receive* function. This report shows a list of all stock received into IntelliVault. Print and use this report to reconcile against Supplier invoice
2. **Exceptions Report** – Generated for any Inventory Adjustments, these must be reviewed and acknowledged daily.
3. **Mark as Recall Report** – Appears after *Mark as Recalled* function is performed. Includes details of any baskets affected. All affected baskets move into the virtual "recall vault" which are removed from dispensable inventory until a "Return to Vendor" function is performed
4. **Remove for Recall/Return to Vendor –** Appears after *Remove for Recall/Return to Vendor* function is performed. Should be reviewed and acknowledged for accuracy.
5. **Back Up Recovery Report –** List of all fills that are manually input into the system after a system is "back up" (online) after down time

Error! Reference source not found.

To view reports navigate to *Reporting* > ***Error! Reference source not found.***

☐ *END OF DAY:*

Validate that all of the following match at the end of each day (for at least the first week):

1. Manual Perpetual Log
2. Print PMS Inventory Report
3. Print IntelliVault Perpetual Log (*Reporting* > ***Error! Reference source not found.,*** Filter: *Today's Date*)
4. File PMS Inventory Report & IntelliVault Perpetual Log in the Perpetual Log Binder under the tab for that date

Appendix F

NDC Conversion Table

National Drug Code (NDC) Conversion Table

Converting NDCs from 10-digits to 11 digits.

It should be noted that many National Drug Code (NDC) are displayed on drug packing in a 10-digit format. Proper billing of a National Drug Code (NDC) requires an 11-digit number in a 5-4-2 format. Converting National Drug Code (NDC) from a 10-digit to an 11-digit format requires a strategically placed zero, dependent upon the 10-digit format.
The following table shows common 10-digit National Drug Code (NDC) formats indicated on packaging and the associated conversion to an 11-digit format, using the proper placement of a zero. The correctly formatted, additional “0” is in a bold font and underlined in the following example. Note that hyphens indicated below are used solely to illustrate the various formatting examples for the National Drug Code (NDC).

NOTE: Do not use hyphens when entering the actual data in your claim.

Converting NDCs from 10-digits to 11-digits

10-Digit Format on Package	10-Digit Format on Example	11-Digit Format	11-Digit Format Example	Actual 10-digit NDC Example	11-Digit Conversion of Example
4-4-2	9999-9999-99	5-4-2	**0**9999-9999-99	0002-7597-01	**0**0002-7597-01
5-3-2	99999-999-99	5-4-2	99999-**0**999-99	50242-040-62	50242-**0**040-62
5-4-1	99999-9999-9	5-4-2	99999-9999-**0**9	60575-4112-1	60575-4112-**0**1

SUPPORT

GSL Support (24/7) (866) 477-2682

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.

IntelliVault_Rev509.5_20200918
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Customers and external users must inform GSL of possible security breaches and other incidents