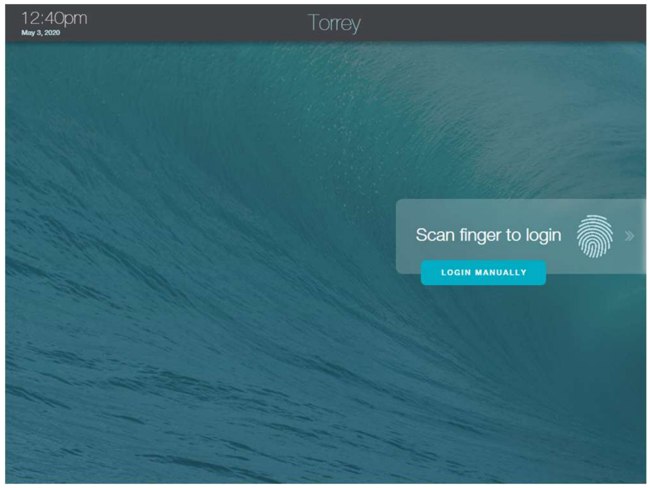
AccuShelf User Guide

The AccuShelf system expands TruMed's inventory management offering to all medications, vaccines, supplies, and custom items for a healthcare facility. AccuShelf delivers efficient inventory control, simplifies workflows, and enhances patient safety in an easy to use system.

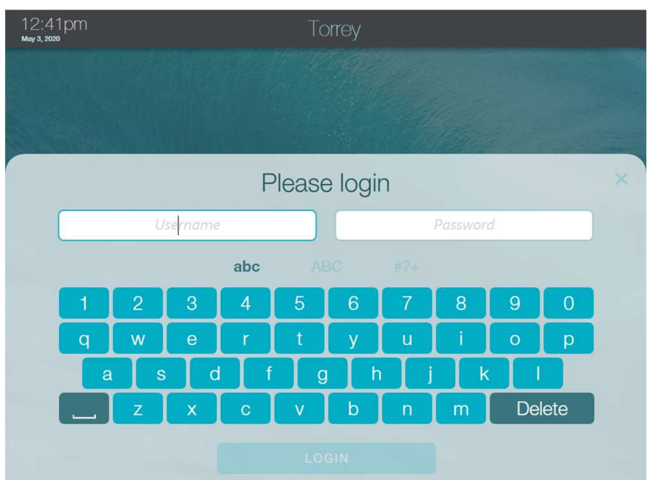
The user guide goes into detail on workflows, features, and capabilities; whether a new user or an experienced user looking to maximize the functionality of AccuShelf, the user guide is here to help.

Login

Users will not have access to AccuShelf unless they have a valid user profile and correct login credentials. There are 2 ways that users can login to the AccuShelf: biometric fingerprint scan and manual entry. As explained in the Users section, each AccuShelf user has a username and password with an optional fingerprint login. How a user logs in is a matter of preference.



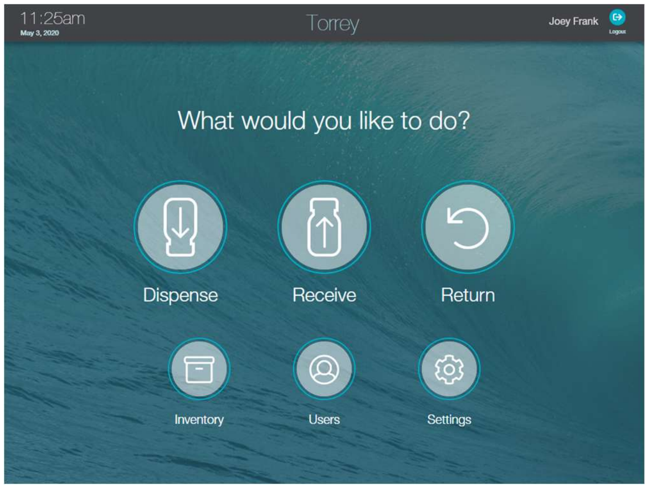
The biometric fingerprint scan can be used at any time. The user needs only to place their captured finger on the fingerprint scanner, and once confirmed they will be brought to the home screen.



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.

Home Screen

The home screen is the first area the user is brought to after logging in. On this screen users can navigate to different areas of AccuShelf. All a user needs to do is press on the section's button to be brought into that section. Users will be brought back to the home screen anytime they press the home icon button within a section.



Access to areas will differ based on a user's permissions:

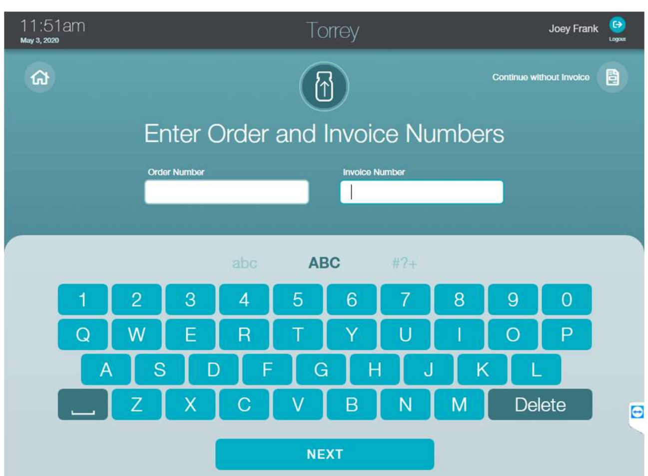
- Clinician users can only Dispense, Receive, Return, and view Inventory
- Administrator users have access to all sections of AccuShelf: Dispense, Receive, Return, Inventory, Users, and the Settings section.

Receive

The Receive section allows users to add items to inventory. Users will be able to track the items' order and invoice number, assign programs, view items' details, and track discrepancies on items received versus items ordered.

Enter Order and Invoice Numbers

When a shipment arrives at a facility, a user can enter the shipment's order number and invoice number with AccuShelf's Receive workflow. When a user selects Receive, they are first bought to the Enter Order and Invoice Numbers screen.

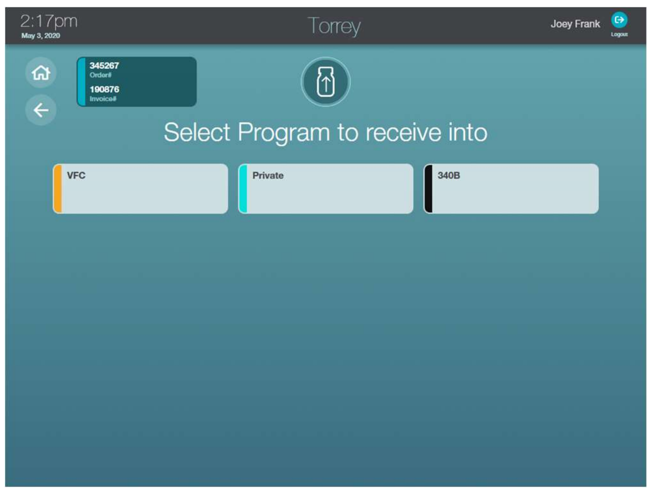


The user will be able to enter an order and invoice number to be tracked and associated with the received items. Once an invoice number is captured in the text field, the user will be able to press the NEXT button and move forward in the Receive workflow. Capturing the order number is optional.

However, in general tracking the order and invoice numbers is completely optional – users can elect to press the Continue without invoice number button at the top right of the screen to move forward with the Receive workflow.

Program Selection

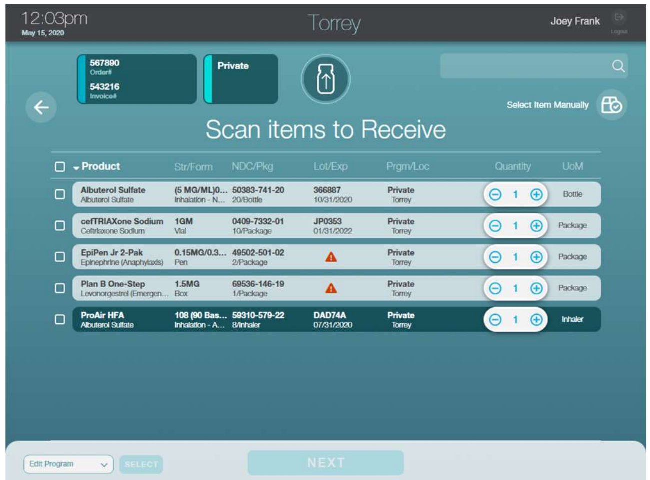
Once the user moves past the Enter Order and Invoice Numbers screen, they will be brought to a Select Program screen to choose the items' source. The programs available on AccuShelf are customizable: a site can have as many programs as they would like, and they can name them whatever they'd like. Items must have a program and can only be assigned to one program; this way all of the inventory is split virtually, and the user will not see Private-Pediatric Tylenol units mixed-in with 340B Tylenol units, for example.



Once a program is selected, the items received thereafter will be assigned to that program. If the shipment includes items that belong to multiple programs, select the program that most items belong to. Individual items' programs can be later reassigned on the Scan items to Receive screen.

Scan items to Receive

The Scan items to Receive screen includes a table of all the items scanned during the Receive transaction. The list will continue to grow as new items are scanned, and the most recently scanned item will be highlighted so the user can easily identify it.



The table includes columns for the item's Product Name and Description, Strength and Form Factor, NDC and Package Count, Lot and Expiration, Quantity, and Unit of Measure (UoM). The column headers are sortable; pressing a column header will change the items order respective to the header title. Pressing the header twice in a row will reverse that order.

The user can adjust the quantity for each item via the + and – buttons. Alternatively, if the user scans an item with the same 2D barcode the quantity will automatically increase (further explained in the Scanning section below).

Items that are missing a lot and expiration will have a red exclamation point icon in the Lot/Exp column. These items will need their lot/expiration added manually, which can be done via the item's detail card.

Once all new items have been scanned and changes have been made, the user can press the NEXT button at the bottom of the screen to complete the transaction. Once confirmed, the items will be added to the site's on hand inventory.

Scanning Items

The Zebra DS22 scanner is capable of scanning an items 1D and 2D barcodes. Scanning each barcode has a different result with AccuShelf:

- 1D barcodes:
  - Scanning a 1D barcode will create a row with a red exclamation point in the Lot/Exp column; this is because the lot and expiration is not captured via 1D barcodes, so the user will need to manually enter those details.
  - If the same 1D barcode was scanned for an item, a new row will be created for each scan; rows only combine if the lot, expiration, and program match.

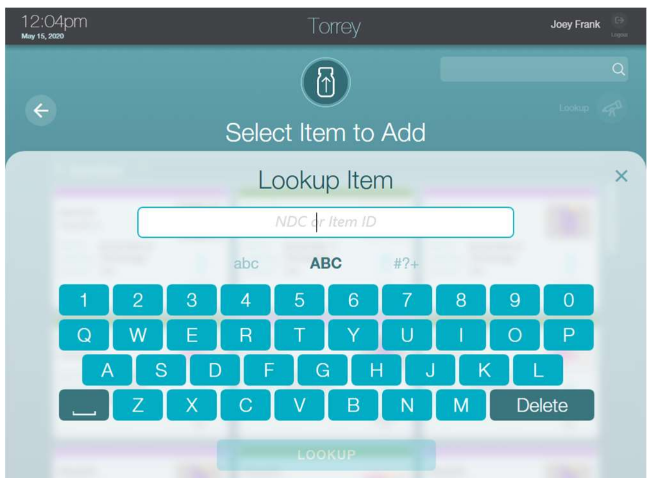
- 2D barcodes:
  - A 2D barcode includes all of the information needed to complete a Receive transaction; *therefore, when both styles of barcode are presented, always opt to scan the 2D barcode*.

- Scanning the same 2D barcode twice will automatically combine each row and increase the total quantity, respectively.

Select Item Manually

If an item does not have a barcode or the barcode is not recognized when scanned, the user can search for that item via the Select Item Manually button on the Scan items to Receive screen.

The Select Item to Add screen lists out all of the items that have been received by AccuShelf. If the item has been received previously the user can scroll through the list or search for the item. If the item is new to the AccuShelf the user can use the item lookup feature. When the Lookup button is selected a keyboard will slide up, allowing the user to enter the item's NDC or Item number.

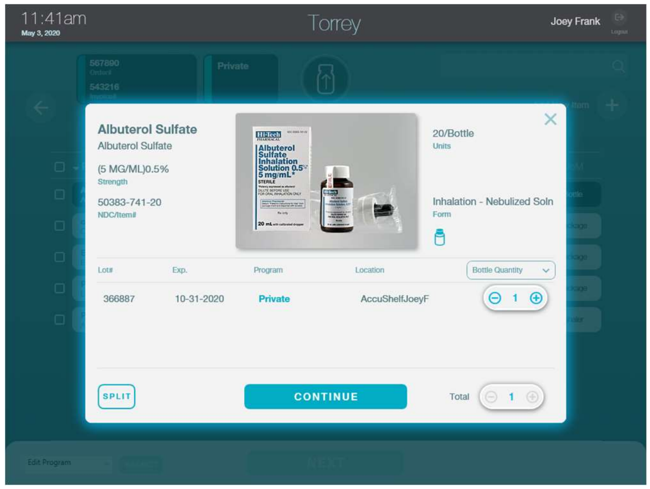


The user can enter the product code, package code, or individual unit code. If an item has multiple package codes associated with one product code, the user will have to choose between multiple item packages once the product code is entered.

The same popup will appear when looking up an individual unit's code that belongs to multiple packages. Once the package is selected the user will be brought to the Scan Items to Receive screen with the item appearing in the table.

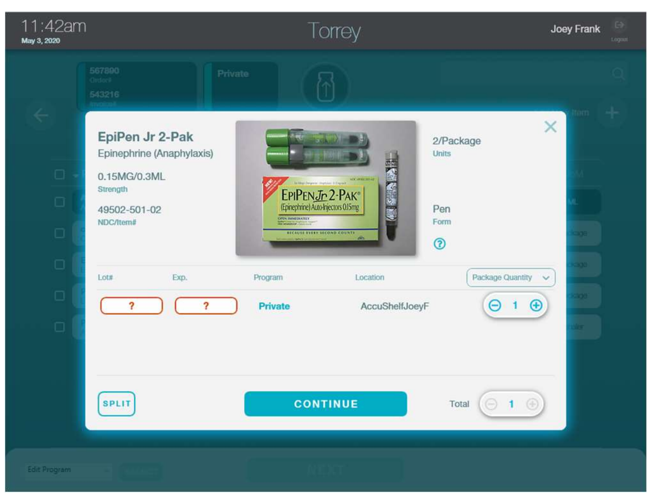
Item Details card

An item's detail card is accessible by selecting the item's row. A popup will appear onscreen, going into deeper detail on an item. The top half of the screen is dedicated to the item's attributes, including the item's name, strength, NDC/Item #, units, form factor, and form factor icon. A photo of the item is displayed, providing a visual to go along with the details.



The bottom section includes the specific Lot, Expiration, Program, that was captured from the barcode scan. Details in this section are editable:

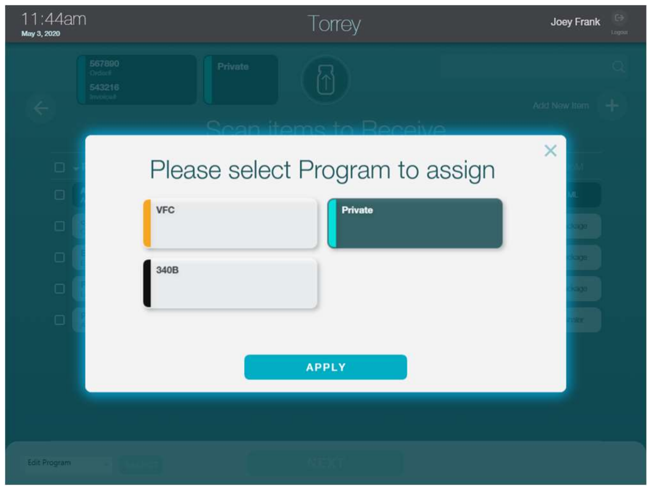
- Users can adjust the quantity on this screen via the + and – buttons
- The program can be changed by selecting the program name
- Quantity header can switch between item count and unit count via drop down, giving the user an option to change their preference on how the count is presented
- The Split button toward the bottom of the card allows the user to split the current item. For instance, if a site has a 300-dose count aspirin bottle but prefers storing aspirin in counts of 100 for easier monthly counts, they could press the split button twice. This will split the current single row into 3 rows with the same lot/expiration/program/location, and the ability to adjust the quantity.
- Lot and Expiration are editable when they were not captured via scan. As seen in the image below, the Lot and Expiration fields will be red with a question mark (?), showing that they need to be addressed.



Pressing on either of the red boxes will cause a slide up keyboard to appear with text fields for the lot and expiration. Once the lot and expiration are captured, users will be able to move forward with Receive.

Bulk Actions

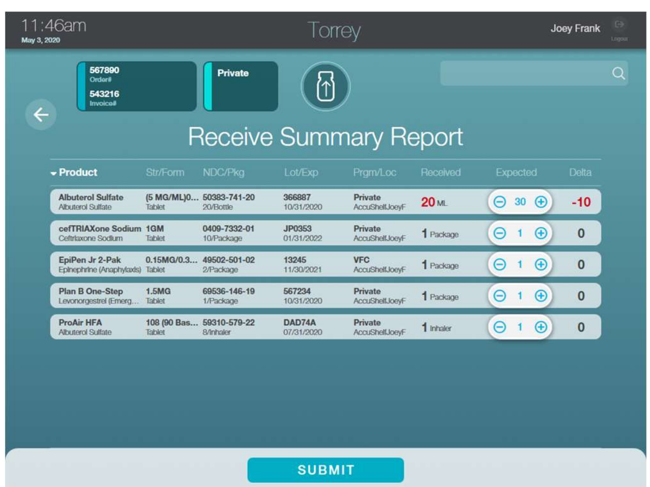
The boxes to the left of the table are part of the bulk action feature, which allows users to make changes to multiple items at one time. A user can select a specific item by pressing the checkbox next to its row or select all items in the table at once by pressing the checkbox in the table header. Once a box is selected, the Bulk Action feature becomes active on the slide out at the bottom of the screen. Selecting the dropdown will let the user bulk edit programs or remove items from the list. Once the user chooses an option and presses the Select button, a popup will appear.



If the user is assigning a new program, a list of available programs will appear in the popup, allowing the user to make and apply the change. If the remove items option is selected, the popup will ask the user to confirm the removal.

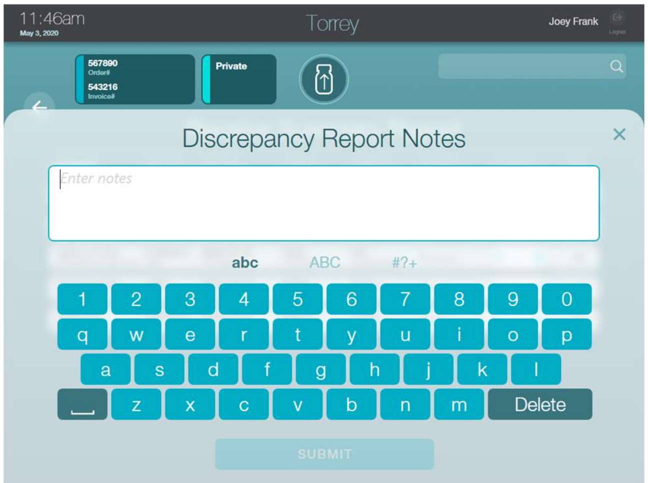
Receive Summary Report

If an invoice number was captured at the beginning of the Receive workflow, the user will be brought to the Receive Summary Report prior to completing the transaction.



The Receive Summary Report lets a user adjust the expected number of items as compared to how many items were actually received. If the user has the shipping invoice in front of them, they can go through and check to ensure that the expected number on the invoice matches what was captured. If there is a discrepancy, the user can adjust the Expected quantity accordingly, and the Delta column will fill-in with the difference (note: adjusting the Expected column will not adjust the amount that is added to inventory.

If there is no discrepancy between the items received and the items expected, the user can press the Submit button and finalize the Receive transaction. If there is a discrepancy the user will have to add a note detailing the situation via the slide up keyboard:



Once the note is captured, a user can press the Submit button to finalize the Receive transaction.

Dispense

The Dispense section is where users can select items for use and administration on patients. Users are able to select from a list of patients, dispense any item in inventory, and create partial doses for a dispense. AccuShelf has 2 dispense modes: patient and inventory.

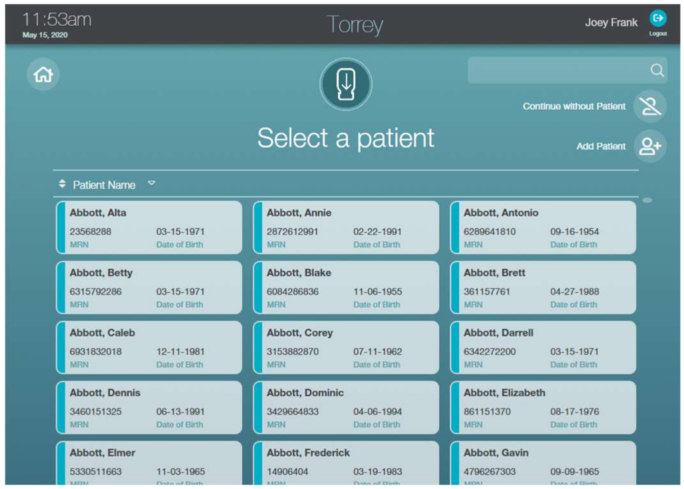
Patient Mode

Patient mode lets users 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 2 ways:

- CSV Import: Users can download their patient list from their EHR and bulk upload the patient list to the MyAccuVax portal.
- Add a Patient: A user can add individual patients either via the AccuShelf or the MyAccuVax 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.



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.

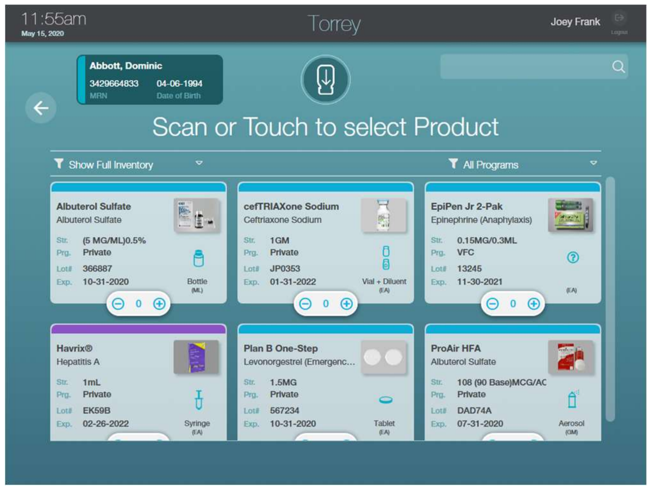
Scan items to Dispense screen
Once the user selects a patient, creates a patient, or selects the Continue without Patient button, they will be brought to the Scan items to Dispense screen. If the user selected a patient, the patient's information will appear on a card at the upper left portion of the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

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

Scanning to dispense
When scanning an item for dispense, the 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 next to expire item, an icon [INSERT ICON] 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 receive that item into inventory
    - If the YES button is selected, the user will be walked through the Receive workflow to capture that item in inventory

- Once the user finishes the Receive transaction, they will automatically be brought back to where they left off, with the newly received item selected for dispense



Selecting 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

Partial Dispenses

Users can elect to dispense a partial dose of an item via the quantity column on the item details card. Tapping on the number in the quantity column will bring up a keypad, allowing the user to enter a partial quantity (i.e. .25).

Scanning to dispense

When scanning an item for dispense, the 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 next to expire item, an icon [INSERT ICON] 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 receive that item into inventory
    - If the YES button is selected, the user will be walked through the Receive workflow to capture that item in inventory
    - Once the user finishes the Receive transaction, they will automatically be brought back to where they left off, with the newly received item selected for dispense

Order Mode

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

<u>One-directional EHR Interface</u>

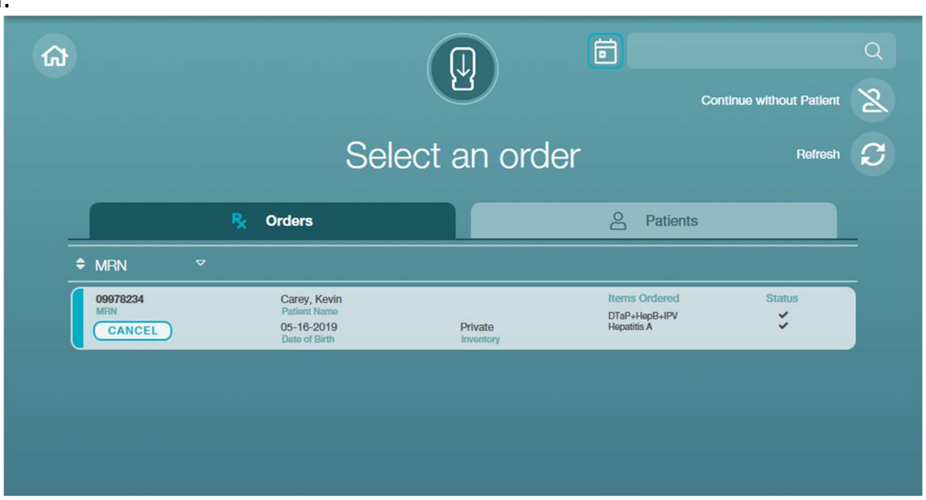
In a one-directional interface, users can create an order for the patient through the patient's chart in the EHR, and that order is sent directly to the AccuShelf.

<u>Bi-directional EHR Interface</u>

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 information back to the EHR system after the Dispense is complete. This information can include the vaccine NDC code, lot, and expiration.

The 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

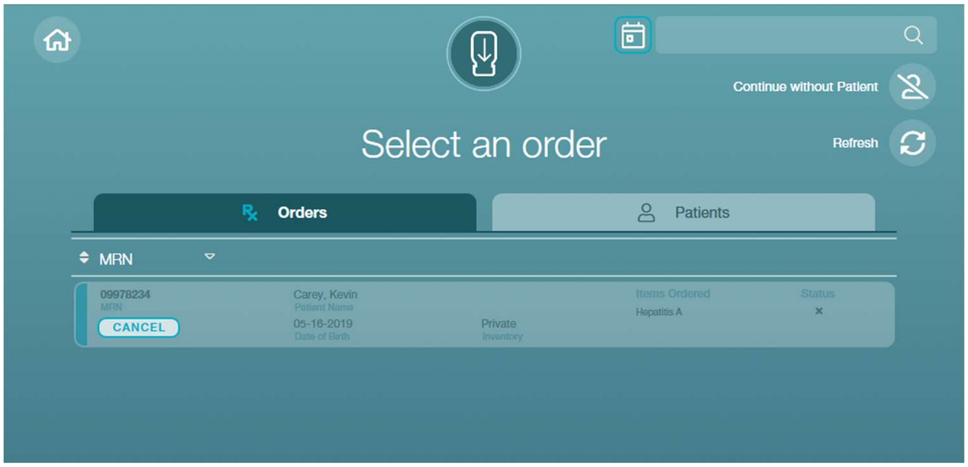
Open orders will display as selectable rows. Included on the row are the following details:

- 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.

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 received and back in stock on AccuShelf. The user can also press the Cancel button to cancel the order.



<u>Partial Orders</u>

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 Receive the out-of-stock vaccine into the AccuShelf inventory and dispense the order or use the Cancel button to close the order.

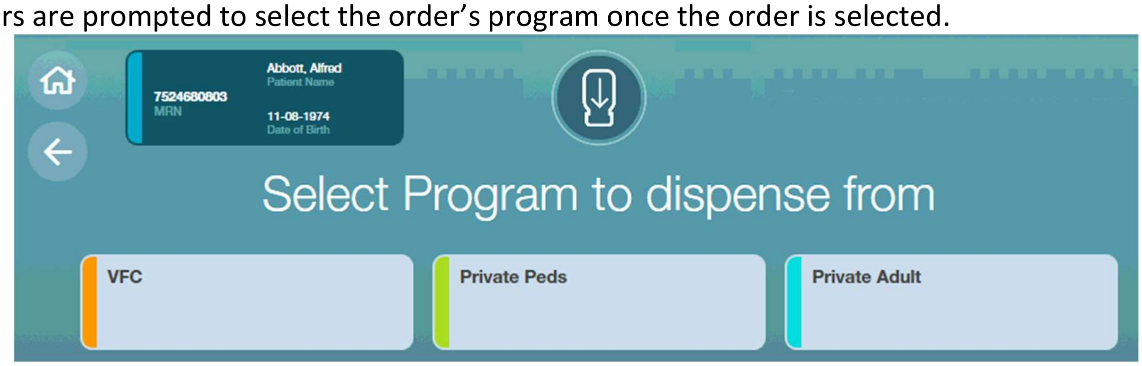
<u>No Program orders</u>

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)

Select program screen

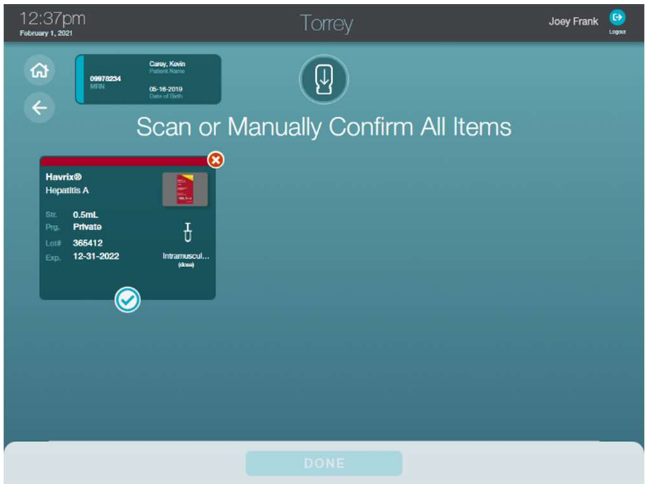
Users are prompted to select the order's program once the order is selected.



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

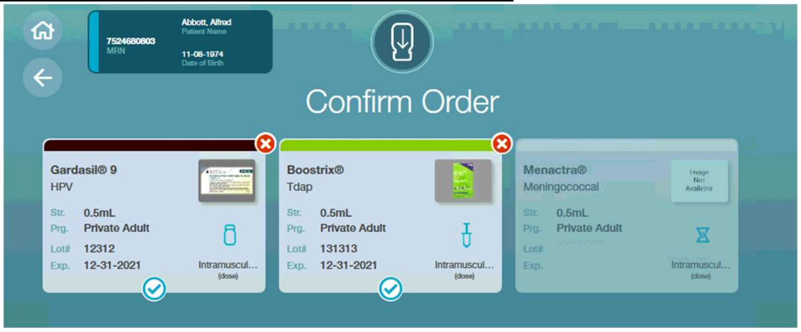
The Confirm Order screen lists all vaccines on the order. The vaccine cards list the next to expire lot and expiration, amongst other vaccine details.



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 in order 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

<u>In stock versus out-of-stock on the Confirm Order screen</u>



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:

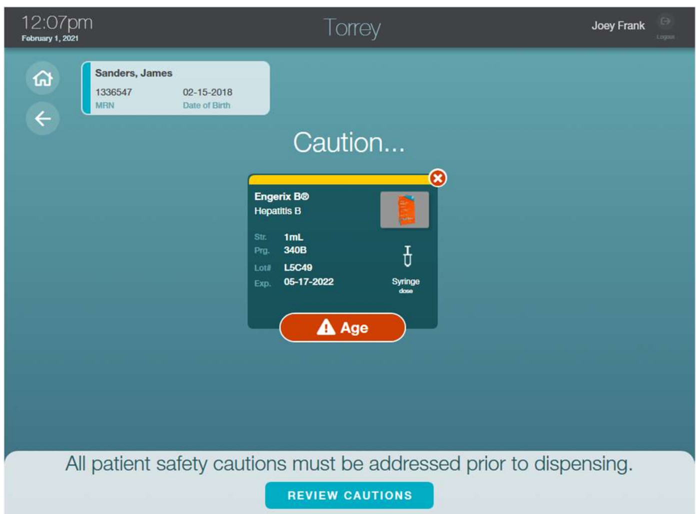
- Appear greyed-out
- Are not selectable
- Cannot be removed from the dispense or confirmed in any way

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.
To 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.

Patient Safety Cautions

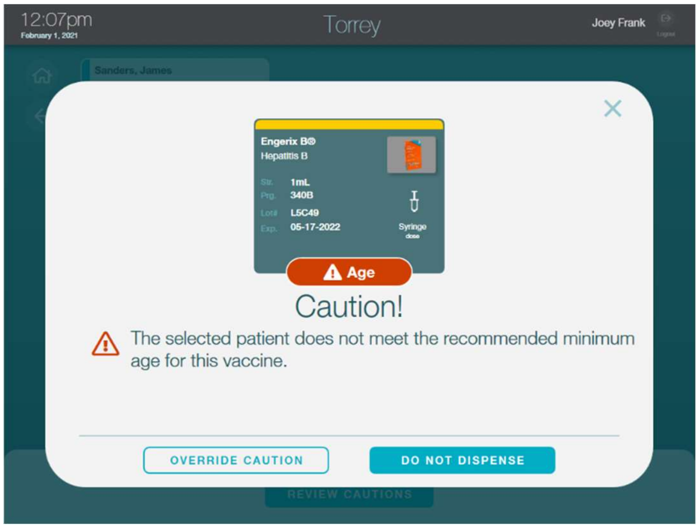
Patient Safety Checks appear when one or more doses in a dispense may affect a patient's wellbeing. The selected vaccine will be flagged if it conflicts with the patient's age, gender, or immunization history:



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

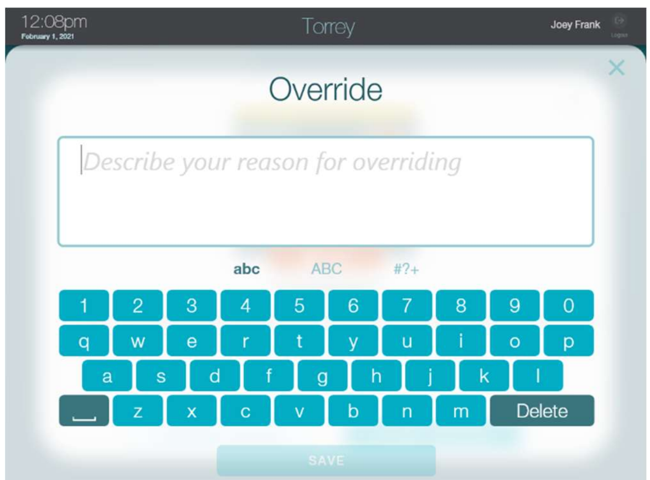
Addressing cautions

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 vaccine was flagged, and the user will have the option to Override the caution or select Do Not Dispense to remove the vaccine from the Dispense list.

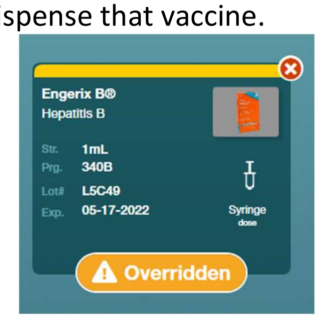


Overriding a caution

Users are required add a reason for a patient safety override if they want to move forward and dispense the vaccine. When the Override Caution button is pressed a textbox will appear on screen, prompting the user to add a reason to override the caution.



The user is required to add a reason for the override. Once the reason is entered and saved,the red-colored safety caution affixed to the vaccine card will be recolored orange and read “Overridden”. The user can now Dispense that vaccine.



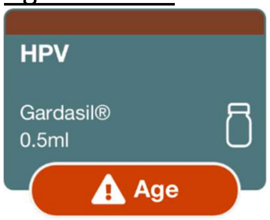
Types of Patient Safety Cautions

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

- Age

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

Age Cautions

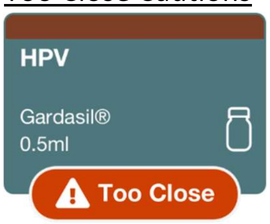


Age cautions appear at the AccuVax when a patient's date of birth is out of the range with a vaccine's licensed age guidelines.

These types of age cautions are possible:

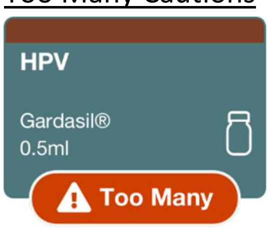
- Maximum Age Exceeded: A vaccine has a licensed maximum age that is less than the age of the patient
- Minimum Age Not Met: A vaccine has a licensed minimum age that is more than the age of the patient

Too Close Cautions



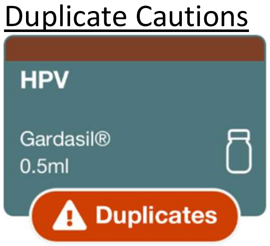
Too Close Cautions are shown when less than the minimum interval time has elapsed between doses for a vaccine.

Too Many Cautions



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

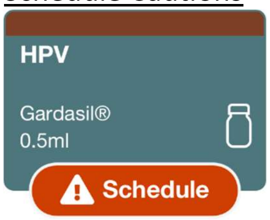
Duplicate Cautions



Duplicate Cautions display when select vaccines are the same or crossover within the same vaccine 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.

<u>Gender Cautions</u>
Gender Cautions appear when a patient's gender is different from the vaccine's licensed guidelines.

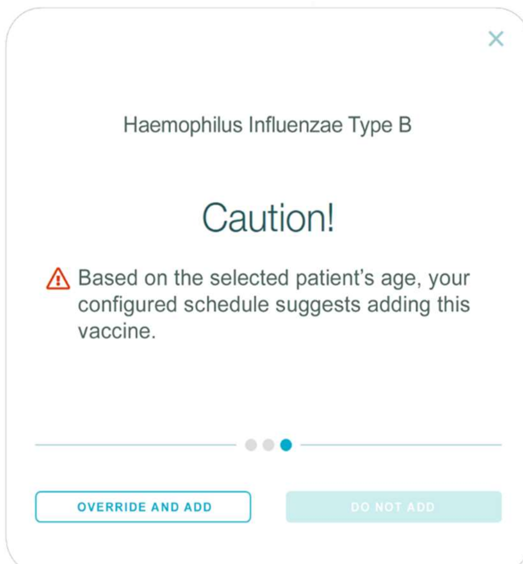
<u>Schedule Cautions</u>



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

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

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



<u>Multiple Cautions</u>
If a dispense is associated with multiple types of cautions, a Multiple badge is shown on the vaccine. All cautions need to be reviewed and overridden before the vaccine can be dispensed.

<u>Scrolling through multiple cautions</u>
All cautions need to be addressed before a Dispense – whether they all apply to one vaccine or multiple vaccines. When there is more than one caution that needs to be addressed the user can:

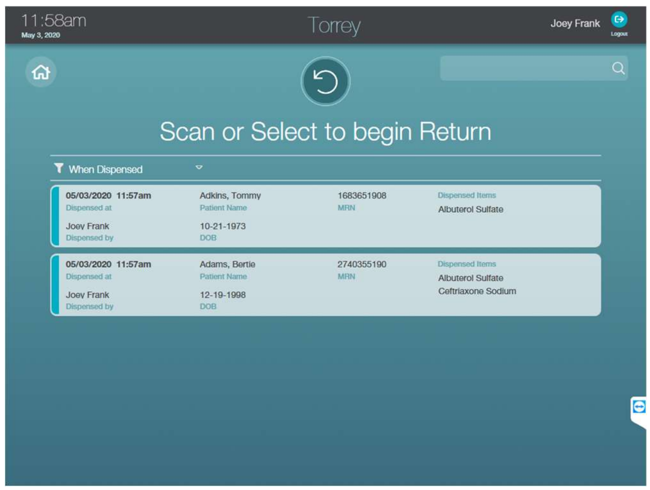
- Scroll from caution to caution via finger swipe
- Press the arrow button to move forward or backward
- Press the tiny circle at the bottom of the popup
- Auto scroll: after each caution is addressed (either via override or do not disense) the screen will automatically scroll to the next caution

Patient safety checks 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.

Return

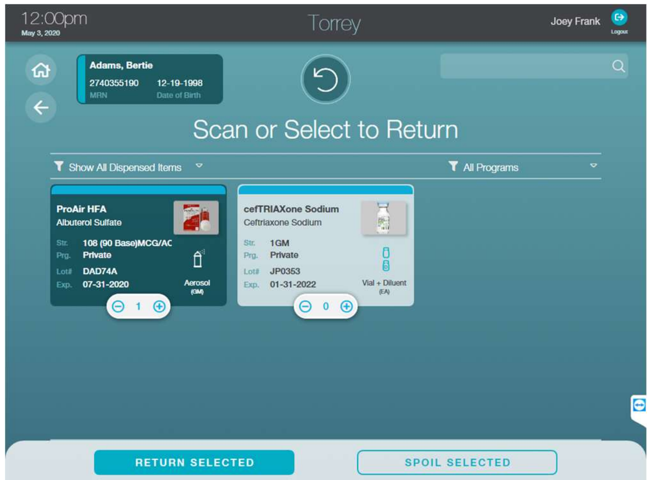
The Return section lets users return dispensed items back into inventory. Additionally, a user can opt to spoil a dispensed item via the Return section.

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 search or scroll to find the dispense transaction that includes the item. Once the row is found, press it.

The user will now be brought to the Scan or Select to Return screen, where they will be able to 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 spoil the item via the Spoil Selected button.



Once the user selects Return Selected or Spoil 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 spoilage, the item will now be tracked in activity as a spoiled item. This is a filterable transaction that can help users track spoilage and waste.
- 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 MyAccuVax portal will no longer show that item. This will also occur if a spoil transaction occurred for a patient's dispensed item.

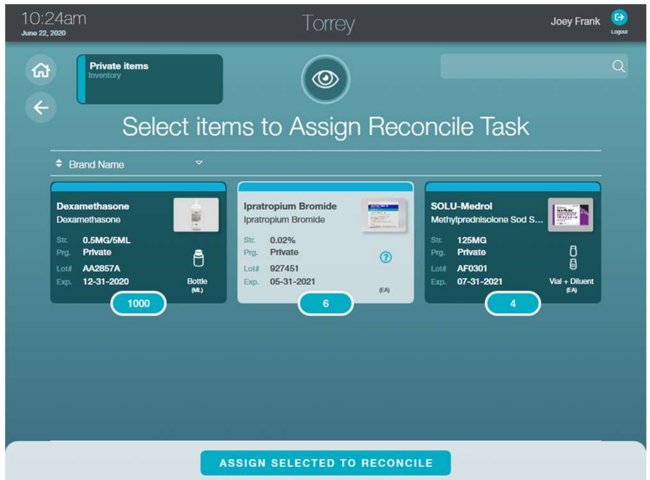
Reconcile

The Reconcile section helps 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. The reconcile process lets users update the AccuShelf inventory based on the physical item count, while tracking discrepancies along the way.

Reconcile can be found in the Inventory section. 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

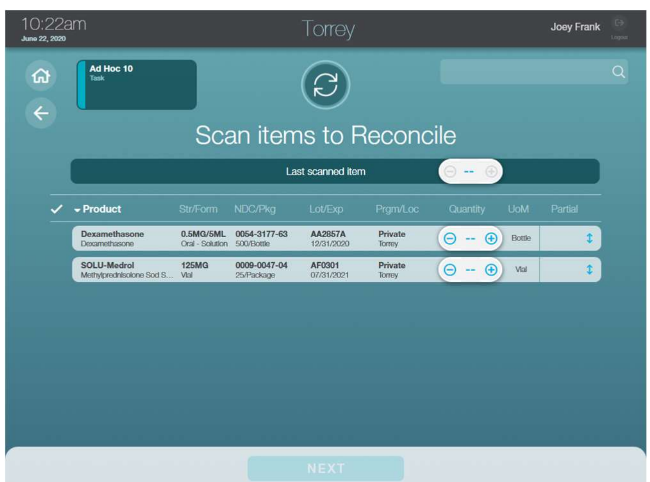
Users can pick and choose which items they would like to reconcile via the Inventory View screen. Once a filter is selected, the user can begin tapping on item cards (there is no limit to how many cards can be added to a Reconcile task).



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 v. Unit View

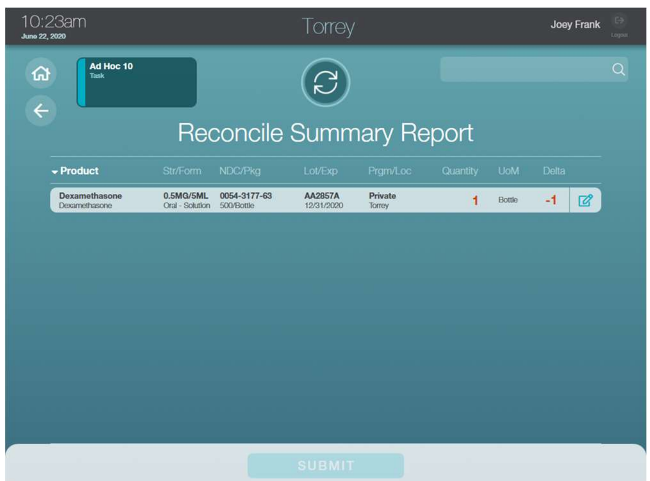
Each item will have a default unit of measure, but users can switch between package and unit counting via the item's detail card. The item's detail card includes a layout similar to other cards on AccuShelf, including the ability to switch the quantity view between package and unit. If the user feels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

Partial

Users can select the partial column on any item's row to apply a partial quantity. Pressing the column will bring up a numpad, which allows the user to switch between a percentage and decimal option. Once a number is entered, the user can confirm and the partial quantity will be applied to the item.

Reconcile Summary Report

After users have adjusted their quantiies 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

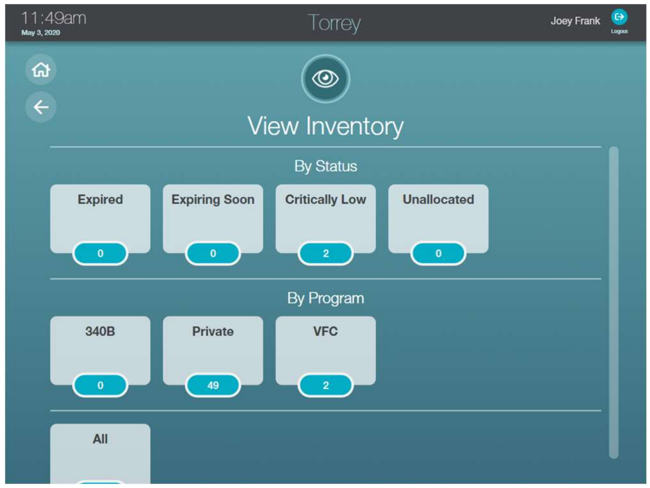
If there are no discrepancies, the user can press the Submit button to complete the reconcile task.

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.

Inventory

The Inventory section lets the user view the site's on hand inventory and recent activity via the View and Activity buttons, respectively.



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 fall into this category – they 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 have unallocated doses appear under this filter. Unallocated items can be properly addressed via the Reconcile workflow.
- By Program: filter on the different programs available on AccuShelf
- All: view all the on-hand inventory at one time

Activity

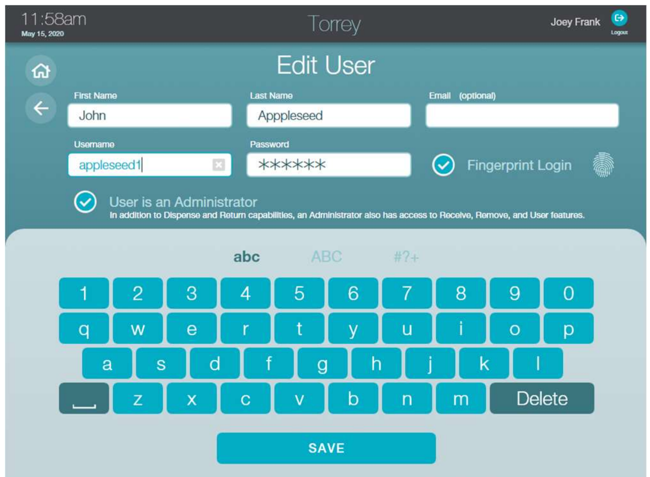
The user can view all of the recent AccuShelf transactions via the Activity section. Scroll through or search for a specific transaction or view each transaction in greater detail on the MyAccuVax portal. Each transaction includes the following details:

- 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)

Users

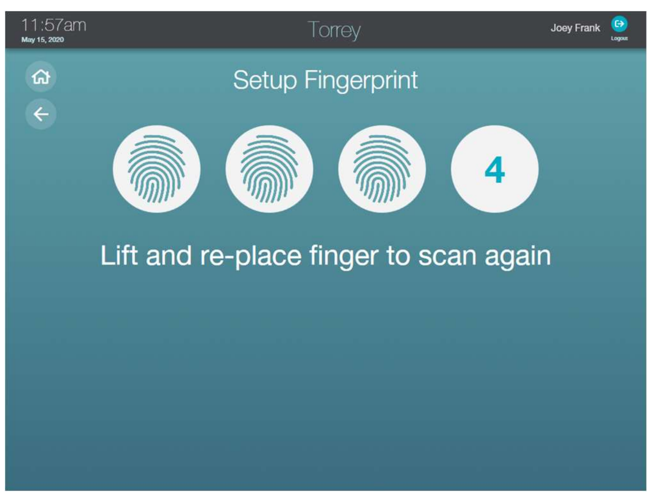
The Users section is where Administrator users can add, edit, or delete a user. After pressing the Users button, the administrator is brought to a screen with a list of users that is scrollable and searchable.

Each row corresponds to one user, with the user's last name, first name, email, username, permissions, and fingerprint status displayed. The administrator can elect to delete a user by pressing the trash can icon or edit a user's details by selecting a row.



Edit User

The Edit User screen lets an Administrator make changes to a user's first name, last name, email, username, password, permissions, and fingerprint login status. Once a change is made, the administrator can press the Save button at the bottom of the screen to confirm.



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 use will be able to login via fingerprint scan. Note: the same finger must be used for all 4 captures, otherwise the fingerprint will not save!

Adding a user

When the administrator presses the Add User button, a prompt appears onscreen asking if they want to add a new user or grant access to an existing user.

Granting access

Granting access to an existing user will bring up a list of users that have access to other locations within the customer account. Selecting a user from this list will allow the administrator to grant access to that user. This workflow is commonly used to grant access to floating nurses and users that transferred to a new location.

New Users

Adding a new user will create a new user profile. There are two ways to go about new user setup: Full Profile setup and First Login Profile setup.

<u>Full Profile setup</u>

Full Profile setup allows the administrator to enter all the user's information at one time: the first name, last name, email (optional), username, password, fingerprint login, and permissions. Once these details are entered and saved, the user will be successfully created. This setup workflow is optimal if the user is at the AccuShelf with the Administrator, so they can enter their personal username and password and capture their fingerprint all at once.

<u>First Login setup</u>

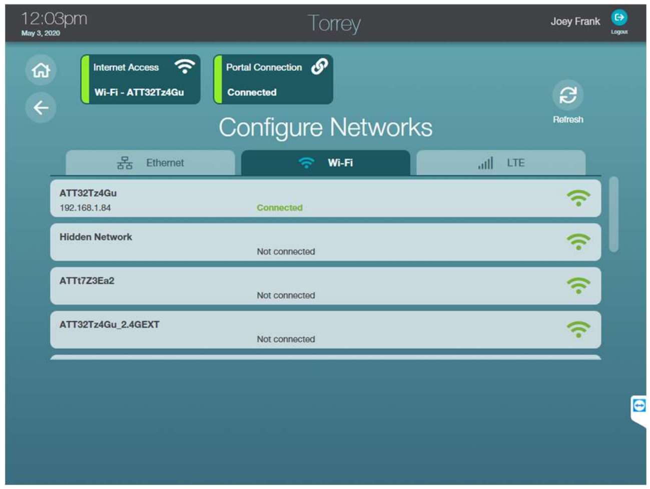
The First Login user setup allows administrators to create new, unfinished user profiles that can be completed by the user. This workflow gives the Administrator freedom to create profiles for their users without having to spend the time to walk through the full setup. When the administrator opts to setup the first login profile, the only information that needs capturing is the first name, last name, email (optional), username, and permissions. Once saved, all the user needs to login for the first time is their username.
The new user can add the remaining details to their profile after the first time they login. The user's password is the same as their username, and once both are entered the user will be brought to the edit user screen. At this point the user will be able to edit their first name, last name, email (optional) and username, reset their password, and capture a fingerprint login. The only mandatory fields are first name, last name, username, and password; once each of those are configured, the user can Save and continue to the Home Screen.

Settings

The Settings section allows admin users to view and make changes to their network connectivity or download and perform a software upgrade.

Upgrade
Pressing the Upgrade button will download a newly released version of software and automatically upgrade the system. Prior to an upgrade becoming available, users will receive an email detailing the new features and functionality included in the software release. If there is no software upgrade available, the upgrade button will be greyed out and not selectable.

Network



The Network section has 3 tabs available: Ethernet, Wi-Fi, and LTE:

- The Ethernet section allows a user to configure their IP address, DNS, and other details of their ethernet connection.
- The Wi-Fi section lists out all of the available wi-fi networks with their signal strength indicated on each row. Users can choose a wi-fi network and connect to it. If they want to make adjustments to their current connection, they can select that particular row and opt to Disconnect or Forget the Network in favor of making a different connection.
- LTE is only available on AccuShelf TM models. When internet connectivity is lost via ethernet and/or wi-fi, the AccuShelf TM's built-in LTE will automatically activate to maintain connection to the MyAccuVax portal.

The cards at the top of the Network section give status on both the internet and MyAccuVax portal connectivity. If there are issues connecting to the internet or MyAccuVax portal, the card will turn red and the user will be alerted.

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 MyAccuVax portal connectivity status
- AccuVax 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 MyAccuVax 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.

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, and the average of the past 24 hours will be sent to the MyAccuVax portal. Users can access the monthly confirmation reports in the MyAccuVax Temperature section.

Temperature section

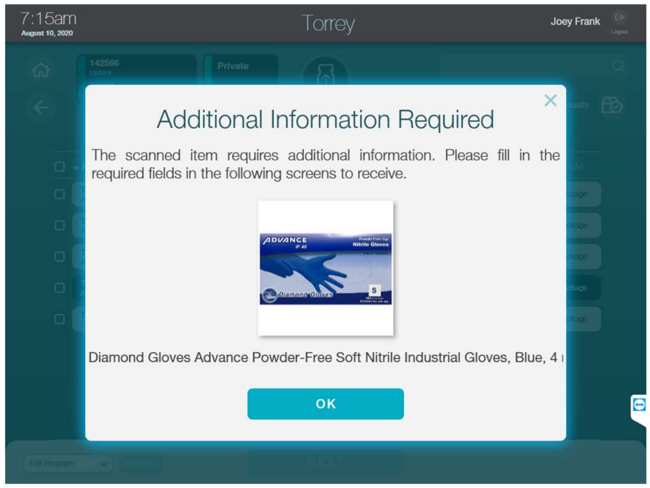
On the AccuShelf's home screen is the Temperature section, which is available to all users. The temperature section will display the same boxes as the screensaver/login screen, with the ability to view the temperature in a graphical format.

Adding Items with UPC Barcode or Create Custom Item

AccuShelf can scan and recognize UPC barcodes; however, they are handled differently than NDC barcode scans. When an item's UPC barcode is scanned for the first time, AccuShelf will walk the user through a one-time setup to add additional item details. If the UPC barcode was not recognized the user will be able to add the item via the Add New Item workflow.

UPC Barcode workflow

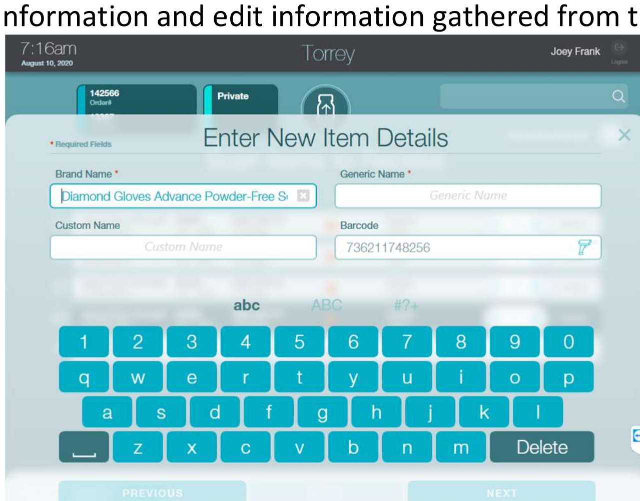
A prompt will appear onscreen when a new UPC barcode to your practice is scanned for the first time.



Each UPC barcode holds valuable information about the item, but additional information is required before it can be used with AccuShelf.

<u>Adding Details</u>

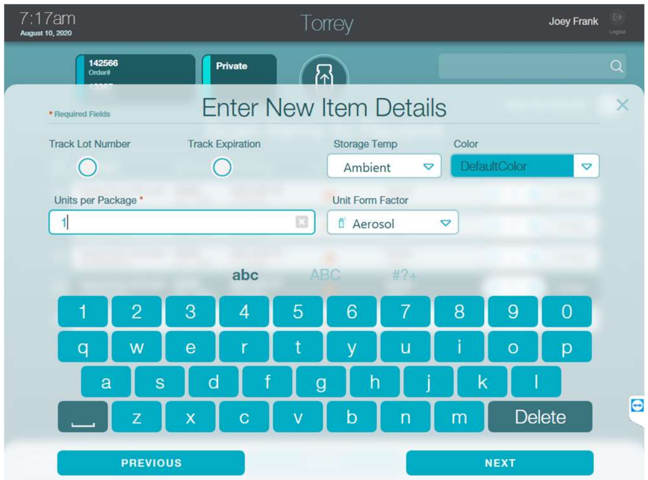
When the user presses the OK button they will be brought through a series of screens where they can add required information and edit information gathered from the barcode scan.



The first screen the user is brought to includes:

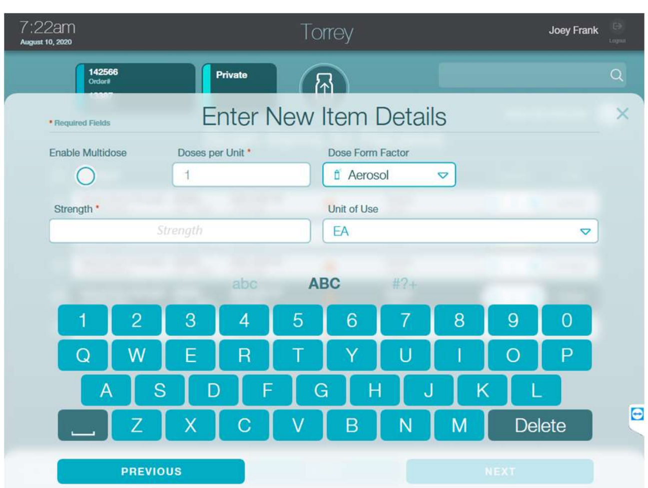
- Brand Name: The brand name is captured by the barcode scan, but it is editable
- Generic Name: The user can add a generic name that is associated with the item
- Custom Name: If the practice has an internal name they use to refer to an item, they can add it here as a custom name
- Barcode: The Barcode field is not editable as it is unique to the scanned item.

The user will not be able to move forward until the required fields are completed.



The next screen includes additional customizations:

- Track Lot Number/Track Expiration: Tracking the lot number and expiration is optional for items. If the item has a lot number and/or expiration date that the user would like to track, they can press the radio button to ensure the Lot Number/Expiration is captured on Receive.
- Storage Temp: This field has the following options: Ambient, Refrigerate, Freeze, Deep Freeze. The user determines how the item will be stored based on manufacturer guidelines.
- Color: Atop the item cards throughout AccuShelf is a colored bar that represents the item's package/unit color. This field will let the user select from a list of colors to represent the scanned item.
- Units per Package: The only required field on this screen asks the user how many units are in each package.
- Unit Form Factor: The user will be able to select the item's unit form factor from a list. If the form factor is not listed, select the Other option.
    - Note: If the Other option is selected the user will be required to type-in the form factor in a field that appears next to Unit Form Factor.



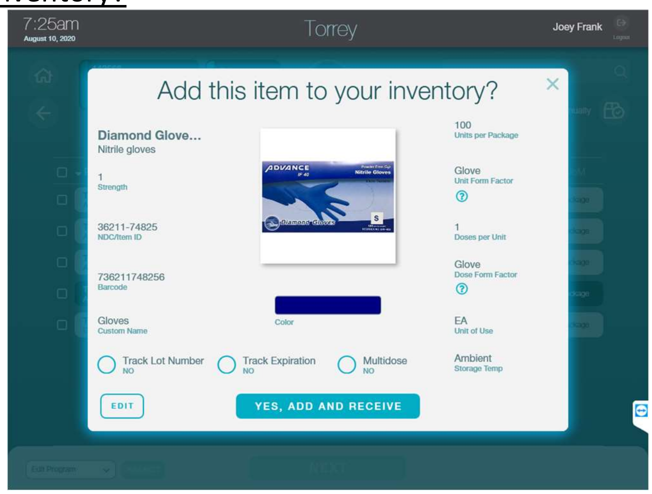
The final Enter New Details screen asks about the following fields:

- Enable Multidose: If there are multiple doses per unit, the item is considered multidose

- Doses per Unit: How many doses are there per each individual unit. Defaulted to 1 dose, it cannot be increased unless the Enable Button is selected.
- Dose form factor: The user will be able to select the dose's form factor from a list. If the form factor is not listed, select the Other option.
    - Note: If the Other option is selected the user will be required to type-in the form factor in a field that appears next to Unit Form Factor.
- Strength: The numeric strength of each dose is captured in the Strength column
- Unit of Use: The unit of measurement for the individual unit. Options include EA, ml, mg, gram, or N/A.

As with the previous screens, once the user enters the required information – Doses per Unit and Strength, the Next button will be highlighted and the user can move forward.

<u>Add this item to your Inventory?</u>



The Add this item to your Inventory? screen is a summary of the details captured throughout the workflow. At this point the user will have 2 options on how to move forward:

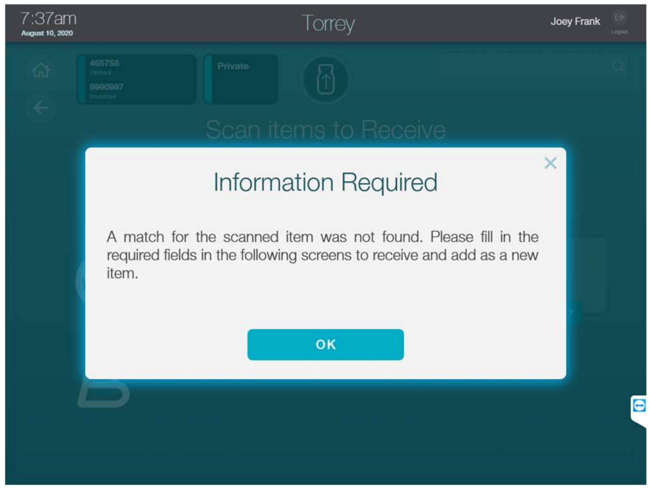
- The Edit button will allow the user to make changes to any of the details
- The Yes, Add and Receive button will save the item's details and bring the user to the Scan Items to Receive screen.

Once the item is added it will be saved to the system. Going forward the item's barcode will be scannable and its item detail card will display all the information captured during the walkthrough; the user will not have to enter the item's details again. If the user made an error and entered an incorrect detail, please contact AccuVax Support at support@accuvax.com or 844-878-6331 ext. 2 to have the issue resolved.

Creating Custom Items or Unrecognized Scans

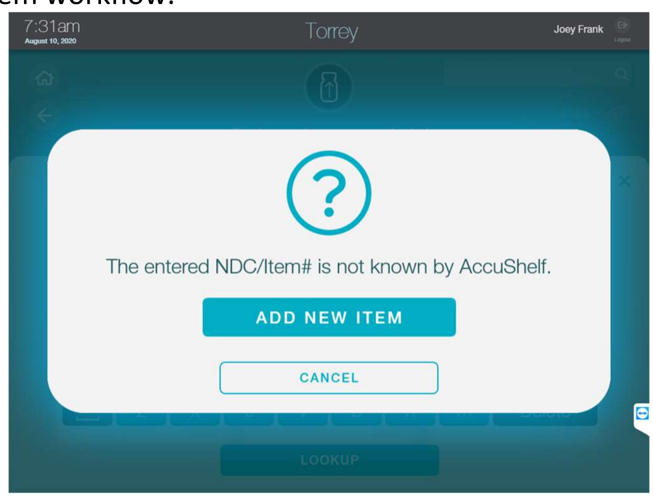
Items that are not found in the AccuShelf database can be added as a custom item. Examples include pharmacy compounded medications or internal use barcodes. The workflow is the exact same as the UPC workflow described above, but the user will start with a blank slate: no information will be prepopulated, so the user will have to enter all fields manually.

<u>How to add a new item</u>



Adding a new item is possible after the item is not found in the AccuShelf database:

- If the barcode is not recognized by AccuShelf the user will have the opportunity to start the Add New Item workflow.



- The user can search for the item via the Lookup button on the Select Item to Add screen. If no result is found the user can select the “Add new item” button on the popup to start the workflow.

Transfer

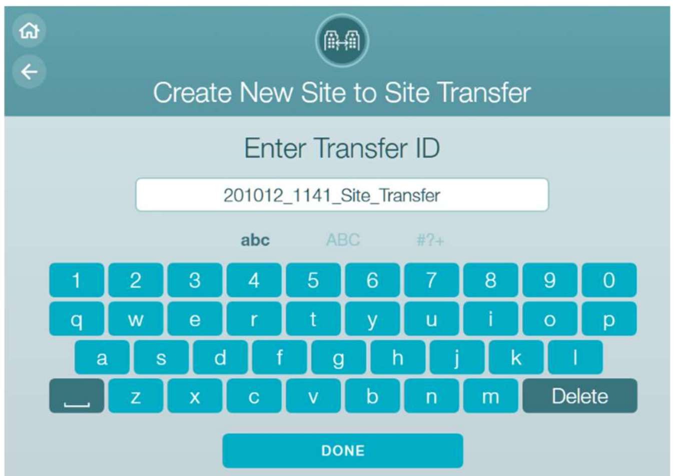
The Transfer feature is available to customers with multiple AccuShelf sites, allowing them to transfer inventory from one site to another, helping to track the movement of inventory throughout the entire account. Users can leverage the new transfer workflow with their central pharmacy, receiving bulk items at the pharmacy and using Transfer to send various quantities to offsite clinics.

What is a Transfer?

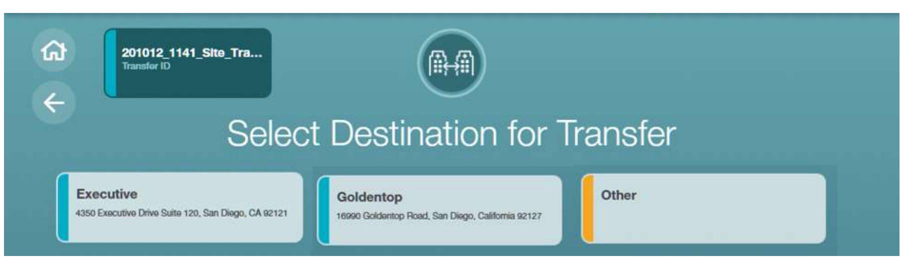
A Transfer is a collection of items that are moved from an origination site to a destination site. Users will add items to an internal Transfer ID at the originating site and choose the destination site within the account. At the destination site, users will go to the Receive section and choose the internal 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 as long as there is inventory in stock; if there are no items in stock then the Transfer button will greyed-out and not selectable.

<u>Enter Transfer ID</u>
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.



<u>Select Destination for Transfer</u>
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.

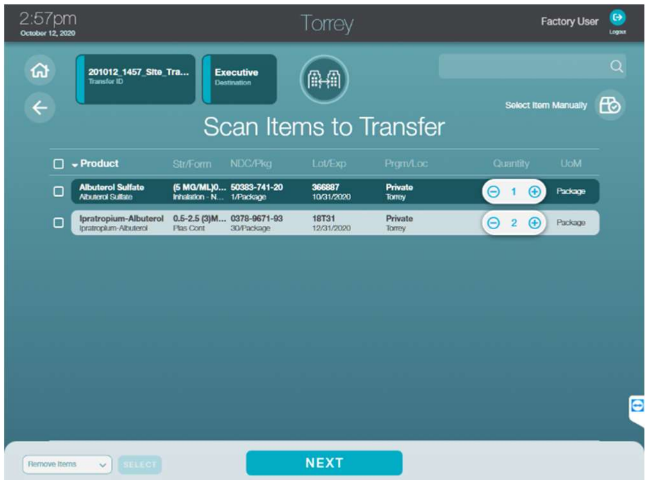


Each option has the site name in bold with the site address listed below. A 'Other' site is available in addition to the account's sites.

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

<u>Scan Items to Transfer</u>

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 Receive: once an item is scanned or manually selected via the 'Scan item Manually' button a table of Transfer items appears.



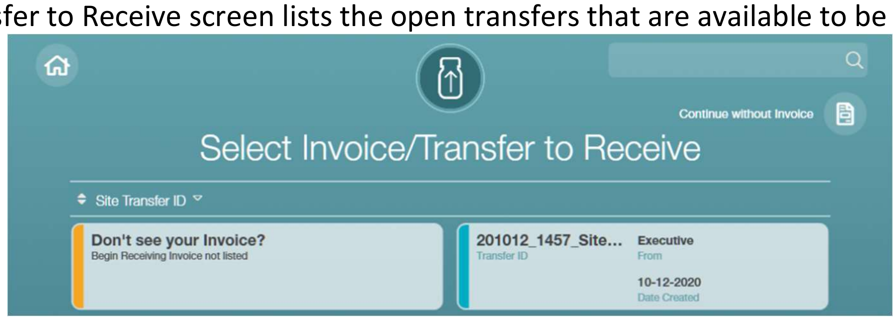
Users can adjust the package quantity, remove items from the table, and switch the unit of measure value on the Item Details card. Most importantly is that users can Transfer any group of items at one time, even if items below to multiple programs. There is no need to create separate Transfers for different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

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

<u>Transfer Report Notes and Submission</u>
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 MyAccuSite Transfer report but will not appear in either the originating or destination site at this time.

Receive a Transfer
Select the Receive button on the destination site to begin the workflow. The Select Invoice/Transfer to Receive screen lists the open transfers that are available to be received.

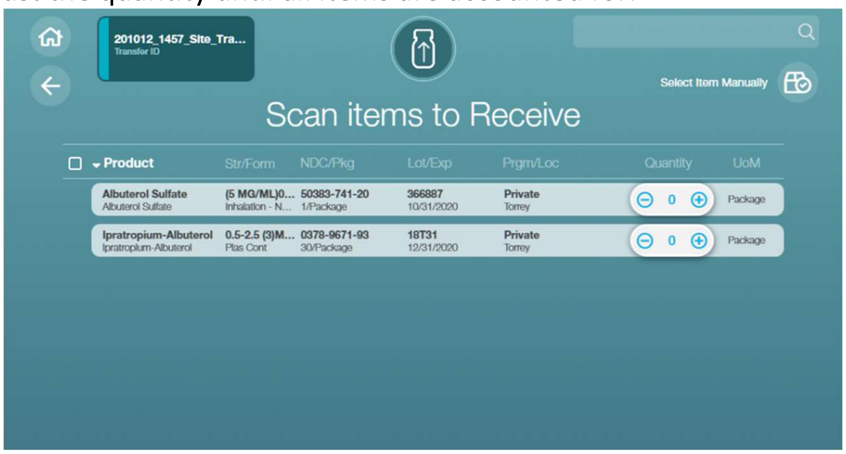


Each Transfer card includes the Transfer ID, Originating site (From), and Date Created. The user has the option to select the 'Don't see your Invoice?' card if they are receiving new shipment not associated with a Transfer.

Transfers will remain open on this screen until they are received and closed-out.

Scan Items to Receive

The user will be brought to the Scan Items to Receive screen once they select a Transfer card. The screen will list all of the transfer items in a table, where users can scan the item packages or manually adjust the quantity until all items are accounted for.



Press Next to move forward to the Receive Summary Report.

Receive Summary Report

The Receive Summary Report lists the items and quantities that were submitted from the Scan Items to Receive screen, but without the ability to adjust the Received quantity.

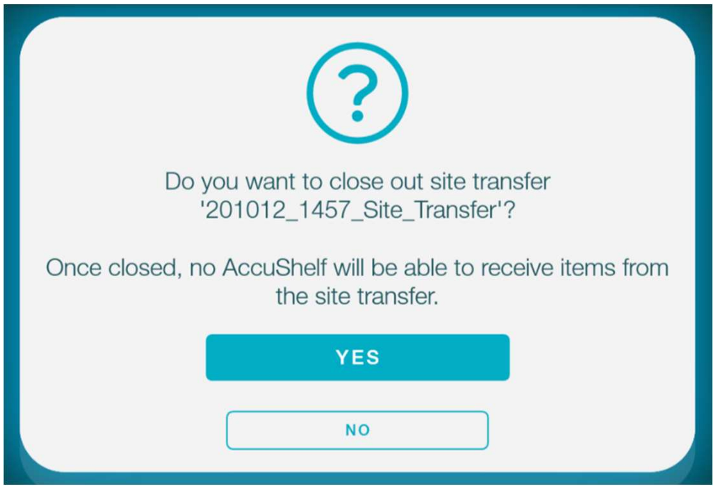
In addition to those details are the Expected and Delta columns. The Expected column lists the number of items from the Transfer ID. The Delta column displays any discrepancy between what was received versus what was transferred by the originating site.

- If the user received more items than what was expected from the Transfer, the delta will be tracked with a **+** in front of the number.
- If the user received less items than what was expected from the Transfer, the delta will be tracked with a **-** in front of the number.

The user can press the Submit button to complete the Receive. If there was a discrepancy the user will have to add a note before submitting.

Closing a Transfer

After the items have been received a popup will appear asking if the user wants to close the transfer:



- Pressing YES: The Transfer will close whether there are items from the Transfer list yet to be received
- Pressing NO: The Transfer will not be closed out, but it will only include the remaining items and quantities.
- Note: If all the items on the Transfer have been received the popup will not appear.

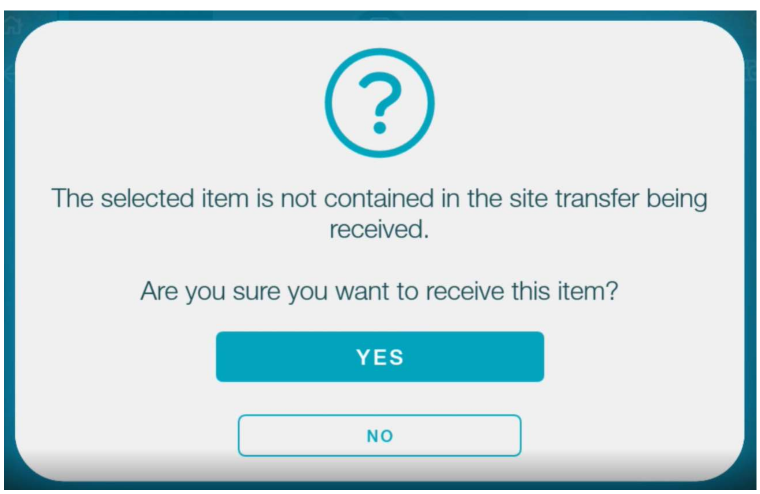
<u>Additional Scenarios</u>

No internet or AccuSite connection

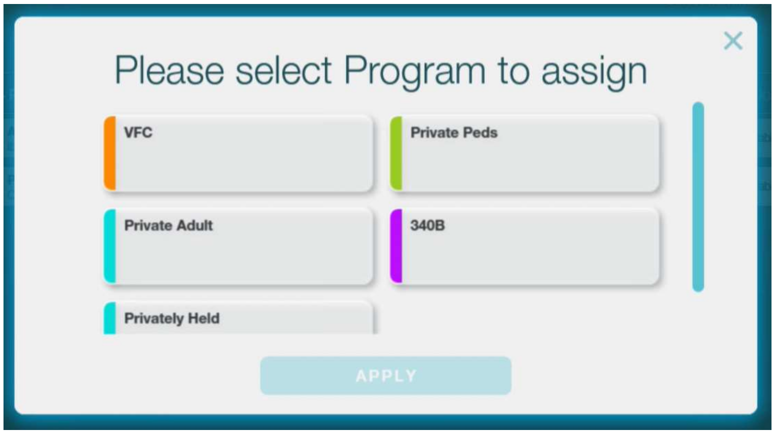
- Transfers cannot be created or completed without a connection to AccuSite.

<u>Adding non-Transfer items on the Scan Items to Receive screen</u>

Users can receive non-Transfer items after selecting a Transfer; that way if users have Transfer and new item shipments arrive simultaneously, they can Receive all items at once. When the user attempts to add a non-transfer item on the Scan Items to Receive screen a popup will appear.



Users will be able to go forward and add a non-Transfer item by pressing the YES button. Once the button is selected a program select popup appears.



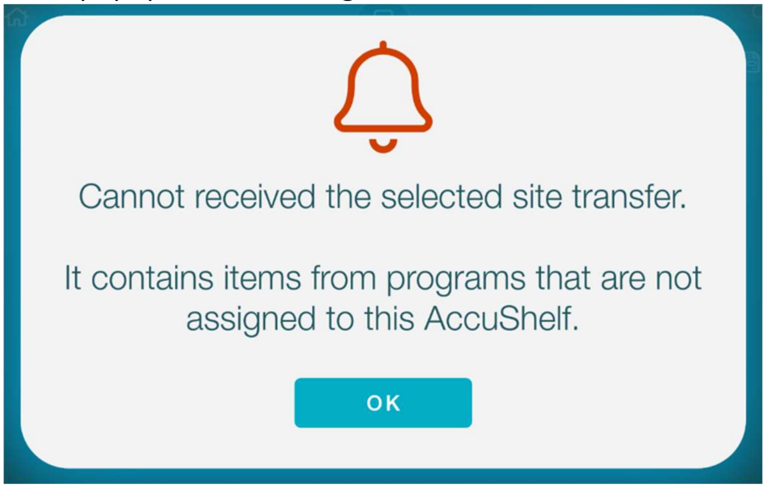
Select a program and the new item will be added to the table.

Note: although this is possible to do this, it is not best practice. Ideally the user would complete the Transfer and then go back into Receive to capture the additional non-Transfer items.

Receiving a Transfer with items belonging to unsupported programs

Users can send a Transfer to any site within the Account, however not every site may have the same programs set up. Users will not have insight into which programs are set up at the destination site, so therefore users can create a Transfer with items belonging to a program that is not supported on the destination site.

In this scenario nothing changes on the Transfer creation side, but users at the destination site will be greeted with this popup after selecting the Transfer:



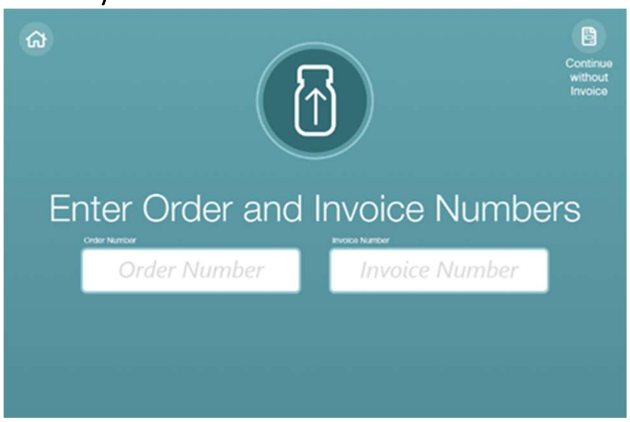
The Transfer cannot be received if there are items belonging to unsupported programs. To receive the Transfer, the user will have to add the unsupported program to their site, which can be accomplished by contacting Support at support@accuvax.com.

340B Workflow

AccuShelf has developed a new 340B feature to help users more effectively track and manage 340B medications. Ease reporting duties and free up staff time by taking advantage of the updates to AccuShelf and MyAccuSite.

Receiving 340B medications

The Receive workflow is updated when adding 340B program medications. Users follow the same Receive instructions as detailed in the section above until they go to select the 340B program. Users can receive 340B program medications just as they would when choosing other programs, except that the invoice number is mandatory in order to move forward in the 340B workflow (the order number is still optional). The invoice number needs to be captured to populate the 340B report on MyAccuSite.

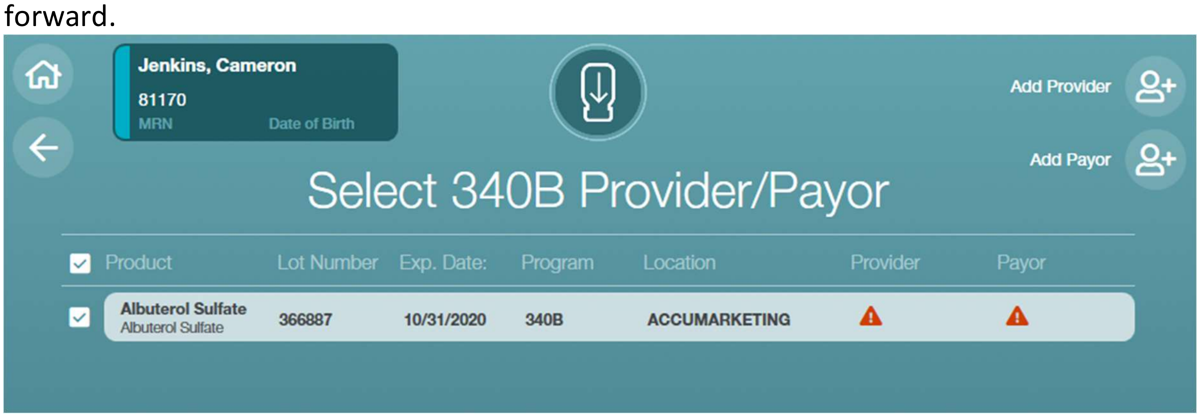


Outside of the change to mandatory invoice capture, there is no other explicit change to the Receive workflow for 340B medications

Dispensing 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.



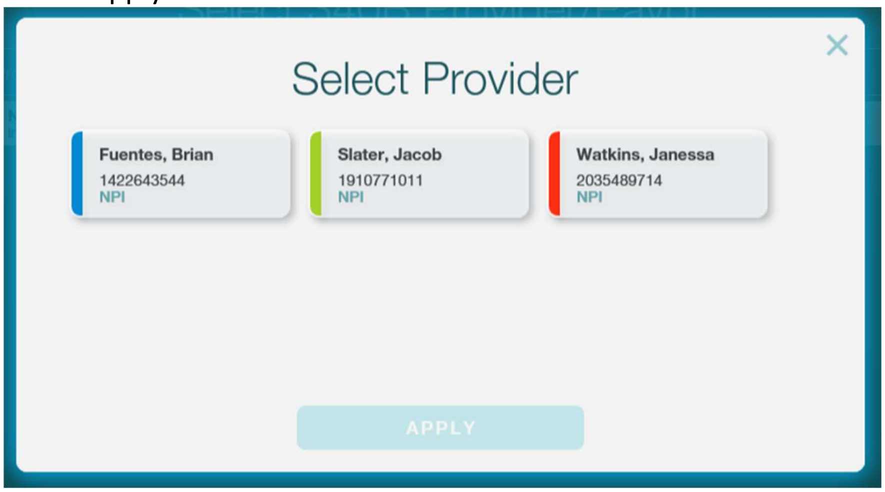
The next screen the user is brought to is determined by the items they selected:

- 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.

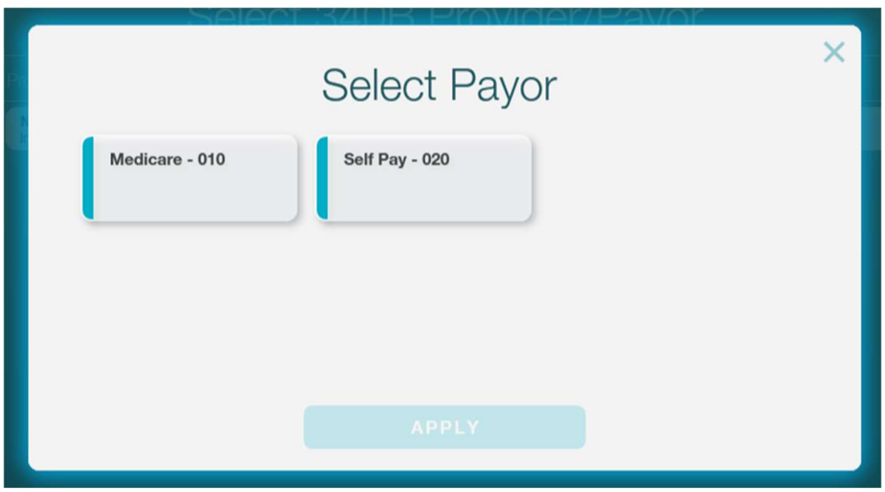
Selecting a Provider/Payor

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.



Users can add a new provider/payor if the provider or payor option is not available for selection.
Press the + button

Adding New Providers/Payors

If the provider/payor the use 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 MyAccuSite 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

Learn more about AccuShelf's dedicated COVID-19 vaccine workflows and features that will help ease storage, handling, and tracking requirements here: COVID-19 workflows on AccuShelf and AccuShelf TM.