



# 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.

# HOW IT WORKS - EASY 4 STEP PROCESS

1

## RECEIVE FREIGHT

- Couple stock bottle (or multiple stock bottles of the same NDC) to a SmartBasket. Optionally, enter the lot number and expiration date. Enter the quantity, then cover with the lid and file into your IntelliVault.
- Fast moving stock can be received into multiple SmartBaskets, allowing for multiple users to access the same medication for filling prescriptions "simultaneously".
- IntelliVault can automatically reconcile your wholesaler controlled drug shipments to your receipts and drugs actually received and stored in the IntelliVault system.



Couple stock bottles to a SmartBasket, then cover with a lid and store it anywhere it fits in IntelliVault

2

## RETRIEVE/FILL RX

- Scan Rx label to begin filling operation. The IntelliVault "Pick to light" system guides you to the correct stock bottle for filling—automatically taking care of NDC verification.
- Fill from the oldest stock first, eliminating today's manual drug expiration date overhead from your pharmacy operations.
- IntelliVault automatically prevents "close dated" or expired stock from being used during the filling process.



**3**

### RETURN STOCK BOTTLE

- Once filled, the IntelliVault system requires a "blind" back count of the stock bottle. The IntelliVault system allows the stock bottle to be returned to storage when the back count matches the IntelliVault system's perpetual inventory.
- IntelliVault ensures the user doing the back count is the same user putting the stock bottle back into IntelliVault, maintaining a complete chain of custody during the filling process.
- IntelliVault can interface to counter top or robotic counting machines for ease of performing back counts of stock bottles and double counts of filled prescriptions.

**4**

### FILE FOR WILL CALL (DUAL USE)

- Dual Use: Filled prescriptions are "coupled" into a new SmartBasket and can be placed anywhere in the IntelliVault for will call customer pickup. IntelliVault now handles your stock, prescription filling and WILL CALL functions.
- For existing IntelliCab customers, filled prescriptions can go directly into your IntelliCab Will Call Management System.
- No more lost or missing prescriptions in will call. No more interrupting the pharmacist to retrieve prescriptions for pick up from your manual controlled drug storage cabinet.
- Simply "look up", "authenticate", and "retrieve" by following IntelliVault's "pick to light" system to locate prescriptions for patient pick up.



#### 1. Look Up



#### 2. Authenticate



#### 3. Retrieve



## Login

To set up Users, refer to the **Error! Reference source not found.** section

1. Scan ID Badge

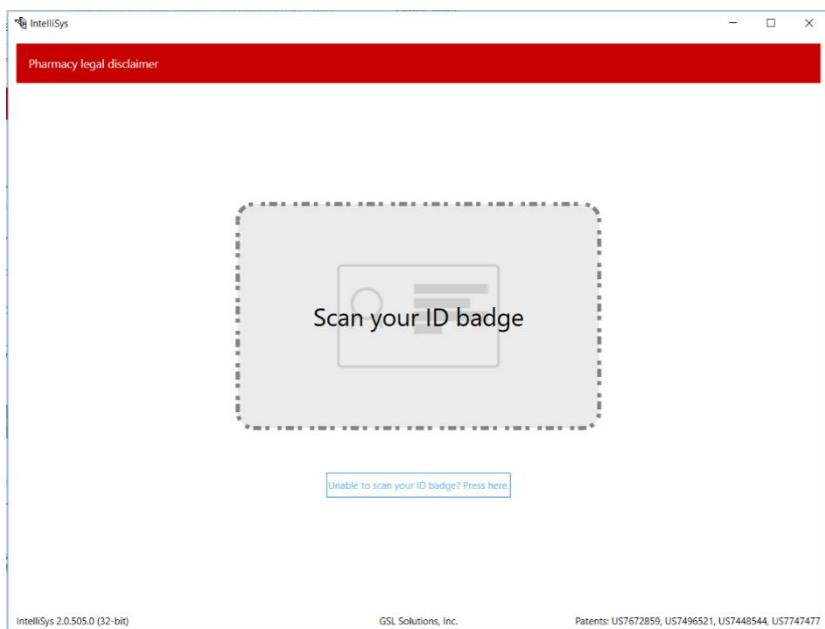
**Note:** If ID Badge is unavailable, press *Unable to scan your ID Badge?* then manually enter the 4-digit ID badge friendly name

2. Enter user name in the second field

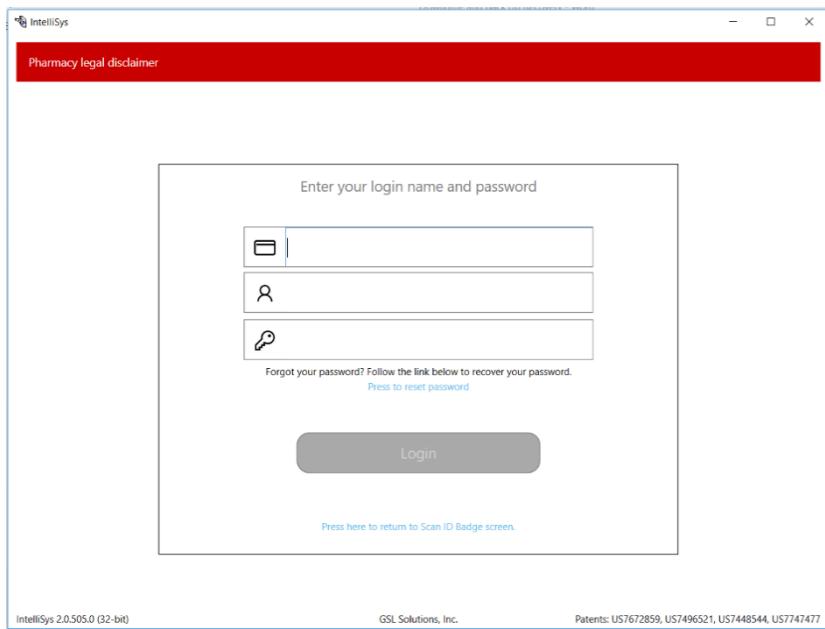
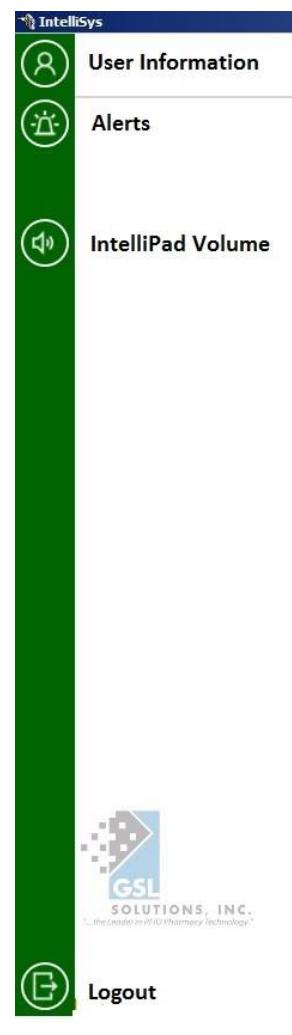
3. Enter password in the third field. To reset your password press the link below the password field

4. Press *Enter* or *Login*

5. To logout, press the logout button at the bottom of the green sidebar



Sidebar Icons



**Note: For Error! Reference source not found., refer to Error! Reference source not found.**

## Stock Receive

### PMS Receiving

#### Tech

1. Start PMS Receiving
2. Stock Arrives; CIs already separated by Supplier
3. Scan each item into PMS to verify receipt
4. Verify received stock against order form and supplier invoice

#### RPh

1. Verify receipt of meds vs. invoice (sort by NDC/Exp/Lot)
2. Print or gather DEA 222 from CSOS and attach to Supplier invoice

### B. RPh IntelliVault Receiving

1. Items need to be sorted by NDC, Expiration and Lot
2. *Inventory > Receive*
3. Select *New Order or Past Order*
4. If New Order, enter DEA 222 Form number and press *OK*  
**Note:** for schedule 3-5 drugs, enter PO number in the *DEA 222 Form* field
5. Enter Invoice Number and press *OK*
6. Select *Begin Processing*

7. Place empty SmartBasket on IntelliPad  
**Note:** Receive workflow may be cancelled at this time by pressing *Start Over*  
**Best practice:** Remove stock bottle caps to determine sealed bottles. Keep the lid on the open bottle for each SmartBasket.  
**Note:** Break up fast-movers in multiple SmartBaskets



8. Scan 2D (QR) code on each stock bottle and place into SmartBasket  
**Note:** If 2D code is not available, scan NDC barcode  
**Note:** If code does not scan, manually enter the full 11-digit NDC. (See Appendix F Error! Reference source not found.)
9. Confirm QTY contained in basket, press *tab* key
10. Enter Lot number, press *tab*
11. Enter Expiration date, press *tab*
12. Press *Confirm* button to complete receiving for that SmartBasket
13. Place a lid on the SmartBasket

**Refrigerated Items:** Using a SmartBasket, enter information as above, then place a card with the stock information in the SmartBasket as a “point-to”. For fills, enter each Rx# and decrement the QTY on a card (such as the AF 579 Controlled Substance Register form). Store the item in the refrigerator. The refrigerator key may be stored in the SmartBasket.

14. Second user logs in to verify stock contents
15. *Inventory > Verify*
16. Place the stock basket on the IntelliPad and press *OK* on each item or press *Confirm All*. Basket widget will turn green and will show **Verified**
17. Place lid on stock SmartBasket and shelf into IntelliVault  
**Note:** Must be the same person who verified the stock basket

18. Complete all receiving for that invoice

**Note:** When finished with stocks on invoice press *Done for Now*.

Press *Received List* in lower right at any time to view the stock received for that invoice and to reconcile

Form# with Invoice#

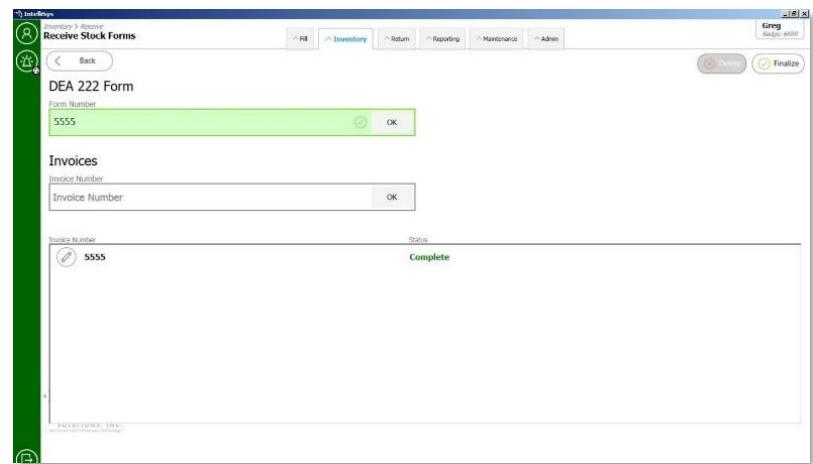
19. Press *Complete Invoice* button

20. Press *Finalize* button

**Note:** a. IntelliVault generates Stock Receive Report and adds task to

**Error! Reference source not found.**

b. Print Stock Receive Report and match each NDC to invoice and 222



**View Reports**

**Reports**

- Use It Up Report
- Purge Report
- Perpetual Log by NDC Report
- Vacancy Report
- User-Generated Reports
- Inventory Operation
- Downtime Recovery Report
- Recall Report
- Stock Receive Report**
- Return To Vendor Report
- Remove For Recall Report
- Exception Review Report

**Stock Receive Report**

Stock Receive Report

Pharmacy: GSL Lal  
Address: 123 Street  
Vancouver, 98866  
Phone:  
Pharmacy Number: (909)555-1212  
NABP Number: 1  
DEA Number: BA12345678

**Receive Form**

Entry Date	Completion Date	Form User	DEA 222 Form Number	Status
4/26/2019 8:36:45 AM	4/26/2019 8:42:17 AM	Greg.B	2436	Completed

**Invoices**

Entry Date	Completion Date	Invoice User	Number	Status
4/26/2019 8:36:46 AM	4/26/2019 8:42:15 AM	Greg.B	2436	Completed

Basket	NDC	Drug Name	Lot Number	Exp. Date	Quantity	Date Received	Date Shelved	Receive User
QRPT-S	00406-0123-01	HYDROCODONE-ACETAMIN 5-325 MG	2436	08/2019	100.000	4/26/2019 8:37:49 AM	4/26/2019 8:41:01 AM	Greg.E
F7T1-S	00406-0123-01	HYDROCODONE-ACETAMIN 5-325 MG	2436	08/2019	100.000	4/26/2019 8:40:12 AM	4/26/2019 8:42:09 AM	Joe.I

Totals By NDC:	NDC	Drug Name	Quantity
	00406-0123-01	HYDROCODONE-ACETAMIN 5-325 MG	200.000

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4/29/2019 11:26:39 AM

## Prescription Fill (Tech Fill, Pharmacist Verify)

### A. Tech Retrieves Stock from IntelliVault

#### 1. Print Rx label in PMS

**Note:** To force print a label in McKesson:

- a. F3
- b. Enter Patient name
- c. Double click on the Rx
- d. Print Options
- e. Label type, select drop down, select Rx label manual
- f. Print

#### 2. *Fill > Fill*

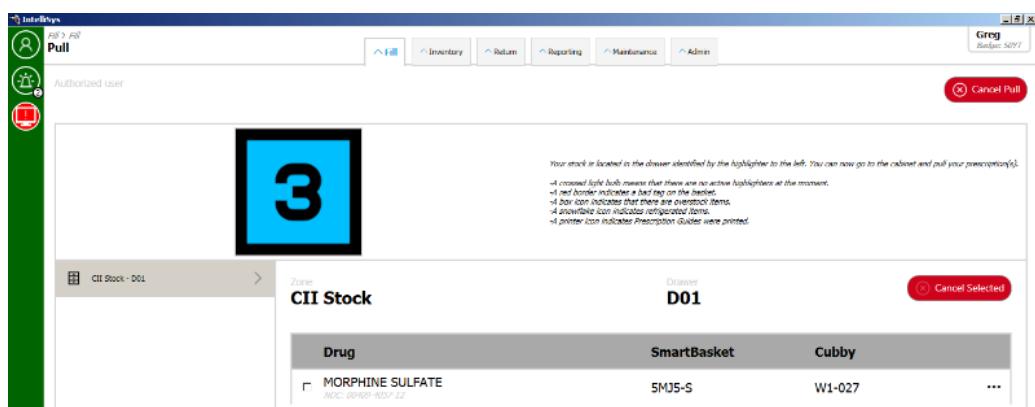
#### 3. Scan Rx label barcode

**Note:** To cancel the pull press *Cancel Pull*.

**Note (DoD Only):** If NDC is unavailable in dispensable inventory, IntelliSys will fill with an alternative NDC of the same drug, strength, and form of delivery.

**Note: For partial fills,** either change the quantity in the pharmacy management system, or perform an Inventory Adjustment. Document the reason with the Rx number, etc.

#### 4. Follow pick light and retrieve SmartBasket(s) above the green LED(s)



IntelliVault

Pull

Authorized user

Cancel Pull

Zone: CII Stock

Drawer: D01

Drug: MORPHINE SULFATE (NDC: 0037-0001-02)

SmartBasket: SMJ5-S

Cubby: W1-027



### B. Tech Fills Rx and returns stock to IntelliVault

#### 1. Place stock SmartBasket on IntelliPad

**Note:** To cancel the fill press *Cancel Fill*, enter the back count, then return the stock basket to the IntelliVault. The Perpetual Log will display the prescription as “Return to Stock” and not as “Cancelled Fill”.

2. Remove QTY displayed on screen to fill Rx
 

**Note:** If multiple SmartBaskets are selected for retrieval, remove the QTY displayed for each basket. Removing a different QTY than indicated will result in an Inventory Adjustment operation.
3. Press *Start Back-count*
4. Enter remaining stock basket quantity and press *OK*. Repeat for each stock basket if multiple were pulled for fill
5. **Note:** Liquid medications have a certain tolerance that is acceptable during Back-count. A back-count that is outside the tolerance will require an **Error! Reference source not found.** Enter the Back-count quantity for all bottles in the stock SmartBasket.
 

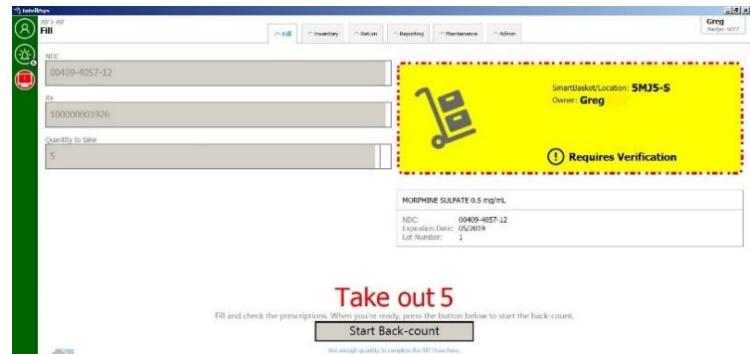
**Note:** User has 3 attempts to enter correct Back-count. If incorrect after 3 attempts a user with appropriate permissions must login and perform the back-count as well as make any necessary **Error! Reference source not found.**s
6. Remove stock basket from IntelliPad and shelve in IntelliVault. Successful shelving is indicated by a quick blink of a green LED and an audible chirp.
 

**Note:** If the LED is blinking yellow, the basket above the LED needs attention. It may be pulled from the drawer without an alarm.

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

A blinking red LED indicates an unauthorized pull. Pull the basket from the cell and

6. Place the SmartBasket on the IntelliPad
7. *Inventory > Take Ownership*
8. *Inventory > Verify*
9. Verify the NDC, Qty, Lot, and Exp
10. Shelve in the IntelliVault



**Note:** If the correct basket count is now zero, the empty basket may be placed back into circulation

**Refrigerated Items:** Follow pick light and retrieve SmartBasket. Retrieve the medication from the refrigerator. Enter the Rx# and decrement the QTY on the card (such as the AF 579 Controlled Substance Register form). Once the QTY reaches zero, place the SmartBasket back in the empty basket circulation.

## C. Tech Couples Rx to a SmartBasket for Will Call

1. *Fill > Rx Entry*

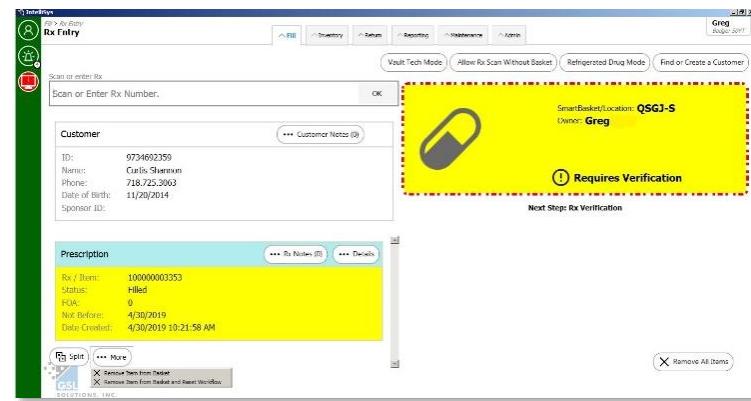
2. Place empty SmartBasket on IntelliPad and scan Rx barcode to couple prescription

**Note:** Only one CII per SmartBasket, coupling an additional Rx into the SmartBasket will result in a mis-coupling error

**Note:** To transfer the Rx to a different SmartBasket press the *Remove* button, then scan the Rx to a different basket

**Note:** Press *More* to remove item basket if needed

3. Pass coupled Rx SmartBasket to RPh for verification and double-count



#### D. RPh Verify

1. *Fill > Rx Verification*

2. Place coupled Rx SmartBasket on IntelliPad

3. Scan Rx or enter manually (twice)

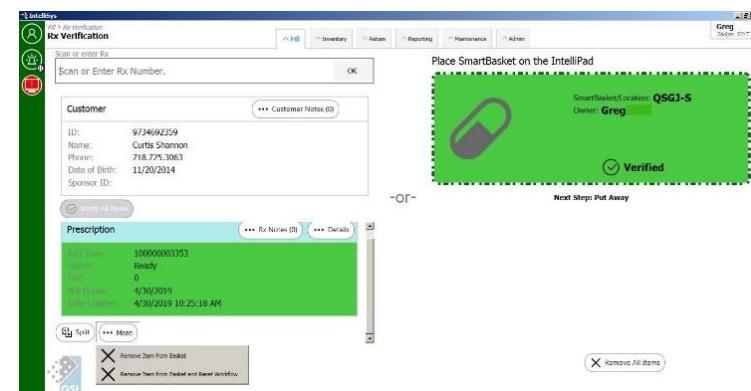
4. Double-count the Rx and press *OK*. Basket widget will turn green

**Note:** To cancel the fill press *Cancel Fill*, the basket will be converted to stock. Shelve the basket in IntelliVault. The Perpetual Log will display the prescription as "Return to Stock" and not as "Cancelled Fill".

**Note:** Press *More* to remove item from basket if needed

5. RPh places lid on SmartBasket and shelves in WillCall IntelliCab

**Note:** The person who verifies must shelf



### Prescription Fill (Pharmacist-only)

Follow all steps for A, B, C and D above.

### Coupling Controlled Substances that have not gone through the IntelliVault Fill process

(Used for prescriptions that have come from Central Fill or Automation)

In IntelliSys:

1. *Fill > Rx Entry*
2. *Place basket on IntelliPad*
3. *Scan Rx barcode(or manually enter Rx number twice)*

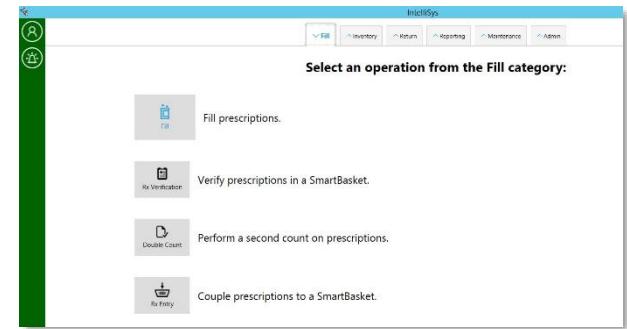
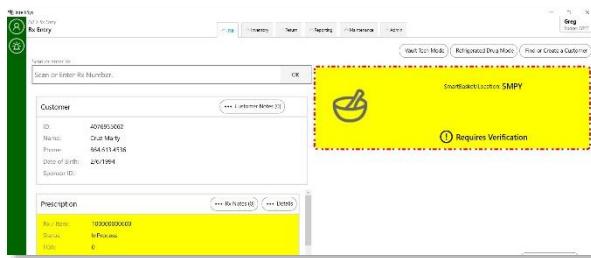
#### 4. Shelved coupled SmartBasket

**Note:** Drugs that are coupled using this procedure will not be marked as controlled substances. Nor will IntelliSys know the NDC, lot # or expiration date.

## Legend Rx Coupling (IntelliSys)

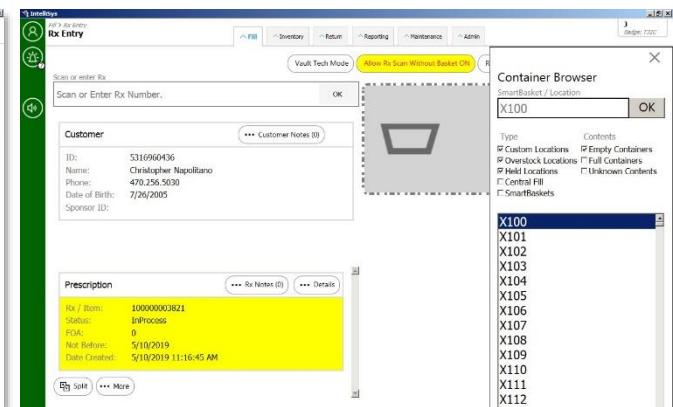
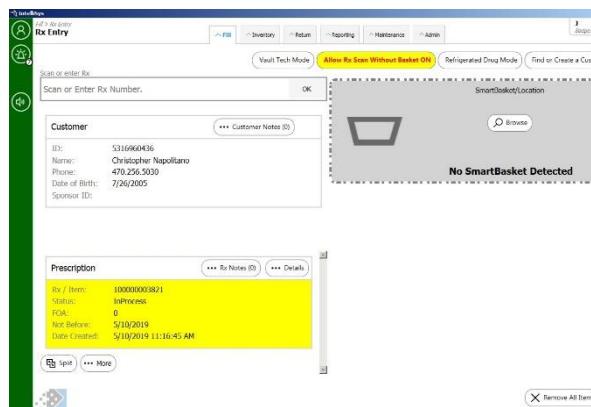
### A. SmartBasket

1. In IntelliSys Client, navigate to *Fill > Rx Entry*
- Note:** Be sure to log off and close WillCall Client before opening IntelliSys
2. Place an empty SmartBasket on the IntelliPad
3. Scan each Rx label and place in the SmartBasket
4. Navigate to *Fill > Rx Verification*
5. Place a lid on the SmartBasket
6. Shelf into WillCall IntelliCab



### B. Oversize/Fridge Location

1. In IntelliSys Client, navigate to *Fill > Rx Entry*
- Note:** Be sure to log off and close WillCall Client before opening IntelliSys
2. Press *Allow Rx Scan Without Basket* or *Refrigerated Drug Mode*
3. Scan each Rx label to be coupled
4. Press *Browse* on the SmartBasket widget to view available locations
5. Select location and double click to couple
6. Place the prescription in the designated location



## Legend Rx Coupling (WillCall Client)

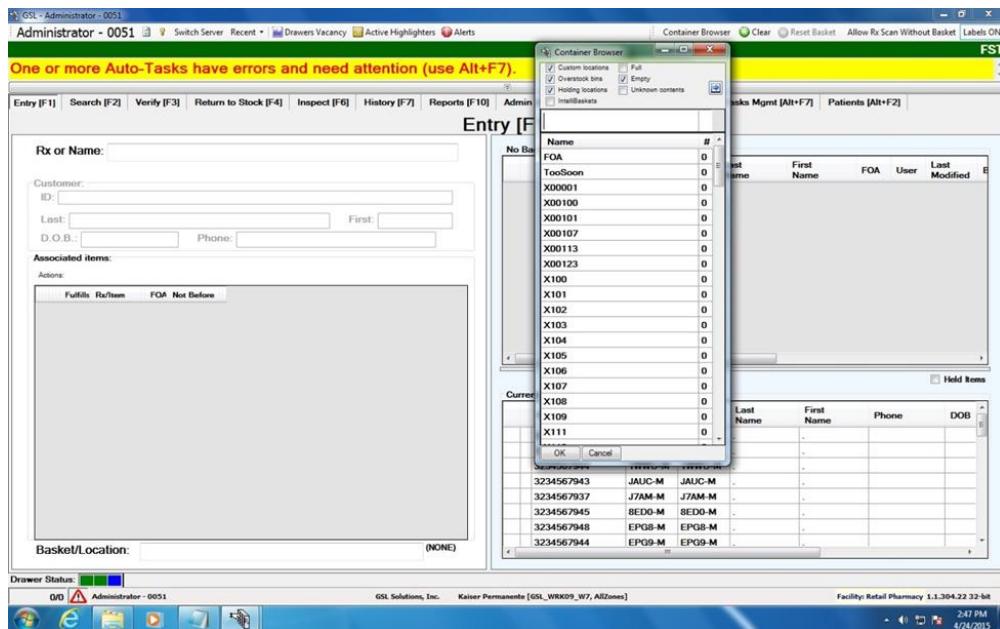
Performed in the WillCall Client (not IntelliSys). Be sure to close IntelliSys first before opening the WillCall Client

### A. SmartBasket

1. In WillCall Client, navigate to F1 Tab  
**Note:** Be sure to log off and close IntelliSys before opening WillCall Client
2. Place an empty SmartBasket on the IntelliPad
3. Scan each Rx label and place in the SmartBasket
4. Place a lid on the SmartBasket
5. Shelfe into WillCall IntelliCab

### B. Oversize/Fridge Location

1. In WillCall Client, navigate to F1 Tab  
**Note:** Be sure to log off and close IntelliSys before opening WillCall Client
2. Press *Allow Rx Scan Without Basket*
3. Scan each Rx label (once)
4. Press *Container Browser* to open
5. Select location and double click to couple
6. Place the prescription in the designated location



Container Browser

### Rx Notes

1. Once an Rx has been coupled, click the Notes icon next to the Rx in the *Associated Items* field

2. Type note or choose predefined note and check “Must read” boxes if applicable. Press *Close* or press *Enter*

### **Patient Notes**

1. Press [Alt, F2] *Patients* tab
2. Type patient last name and select patient
3. Click *Notes* button on right side of screen
4. Choose predefined note or type note and check “Must read” boxes if applicable. Click “Close” or press *Enter*

### **Mandatory Reading of Notes**

1. Once a Note is created, press on either “Must read prior to dispensing”, or “RPh must read prior to dispensing” at bottom of Notes page
2. After initiating a Pull operation, a red “READ!” icon will appear next to the patient’s name on the Second Patient Identifier screen
3. Press on each red “READ!” notes button
4. If it is an RPh note, an pharmacist (or Admin) is required to log in, read the notes, and complete the Second Patient Identifier items. The original operator then pulls the Rxs from the cabinets
5. After reading, the “READ!” icon turns green and the Confirmation Status changes to “Confirmed” after the patient’s DOB is entered

### **Manual Patient Entry Required Data [F1]**

Enter patient's first and last names, then enter the DOB

### **Manual Customer Selection Confirmation [F1]**

When manually coupling, you will now be prompted to enter a 2nd patient identifier (i.e. DOB) to validate that you have the correct patient. You will only be required to enter this 2nd patient identifier for the 1st prescription coupled to the location. So, if you are coupling 5 Rxs to a single location, you will only be required to confirm the 1st Rx. You will also be prompted to confirm the patient if you must select the patient from the patient drop-down box on F1 (i.e. when you type in the patient name manually). The prompts do not appear if you scan a military ID card or if the information comes from the PMS

The 2nd patient identifier dialog can display 2 different fields to use for confirmation, however we will only require that one field be used for confirmation unless corporate specifies that both fields be used

### **Manual Rx Entry Confirmation [F1]**

If an Rx number is typed in for coupling (vs being scanned), you will be required to type in information to confirm the correct patient is being coupled via the new 2nd patient identifier dialog box on F1. The 2nd patient dialog is the same as described in the “Manual Customer Selection Confirmation” section above

### **PMS Down Barcode Scanning [F1]**

If the PMS is down (i.e. we can't look up the Rx), we will allow the barcode to be scanned, if available. This will create a custom item with the Rx number as the custom name. You will be able to scan the barcode to release the Rx when dispensing it. With this change, users should always try scanning barcodes before they ever try typing data to make progress

## Retrieve WillCall Client

Also referred to as "Search". **Performed in the WillCall Client (not IntelliSys). Be sure to close IntelliSys first**

### At Any GSL Workstation, open the GSL WillCall Client (Be sure to close IntelliSys first)

1. Press [F2]
2. Scan ID or enter Patient's Last Name
3. Press on correct Patient and Press [F12] to initiate Retrieval
4. Enter the Patient's Date of Birth (2nd Identifier), if applicable
5. Press [Enter] to confirm. Press [Enter] again to retrieve
6. Pick to the Light. Follow your pick Number/Light to the correct Drawer, identify yourself to the Drawer with your User ID Badge and open it
7. Pick the SmartBasket above the lights and close the Drawer
8. Continue to pick each SmartBasket until no items are remaining to be retrieved. Your pick screen will clear

**Note:** If high alert medications option is turned on, certain medications require a Pharmacist to dispense. The Pharmacist must log in and retrieve high alert medications

### **Oversized / Refrigerator / Other (No Lights)**

1. Go to the indicated Oversized / Refrigerator / Other location. Retrieve all Rxs for patient from that location
2. Scan each Rx to Confirm Pull

### **MedGuide Printer**

1. Retrieve all MedGuides for patient from printer
2. Scan the barcode on the MedGuide banner page to Confirm Pull
3. In the event that scanning is not available, to manually confirm that the MedGuide was dispensed, type in the confirmation code that appears on the the Medguide banner page

### **Pharmacy Consult**

1. If the Pharmacy Consult button was clicked during Entry:
  - a. Press "Consulted" (or "Refused") in lower right of screen
2. Press "Process all as indicated" in top left of screen

### **Mandatory Reading of Notes [F1 and F2]**

- Once a Note is created, press either "Must read prior to dispensing", or "RPh must read prior to dispensing" at bottom of Notes page
- After initiating a Pull operation, a red "READ!" icon will appear next to the patient's name on the Second Patient Identifier screen
- Press each red "READ!" notes button
- If it is an RPh note, an RPh (or Admin) is required to badge in, read the notes, and complete the Second Patient Identifier items. The original operator then pulls the Rxs from the cabinets
- After reading, the "READ!" icon turns green and the Confirmation Status changes to "Confirmed" after the patient's DOB or is entered

### **Cancel Pull**

1. To cancel a retrieval operation, press "Cancel Pull"

2. If "Cancel Pull" is not selectable, highlight the Rx (or all Rxs) in the pull list by pressing it
3. If a SmartBasket that has been retrieved from the IntelliCab needs to be returned to the cabinet, Re-Couple and Re-Verify

## AutoSign (Signature Capture) WillCall Client

### **Performed in the WillCall Client (not IntelliSys). Be sure to close IntelliSys first**

AutoSign is an add-on subsystem for IntelliSys that enables the pharmacy to electronically capture a patient's signature for items at pickup. The AutoSign feature may be configured as signature required for no safety caps, all prescriptions, for controlled substances, or for special handling drugs.

1. Follow the normal selection and retrieval process for retrieving a patient's prescriptions. When the last item is retrieved from the drawer or confirmed from the refrigerator/overstock area, the signature pad is automatically loaded with prescription and patient information and the pick screen changes to the AutoSign screen
2. The patient signs the signature pad and presses "ok"
3. The user verifies the information is correct (driver's license number, phone number) accepts the signature and processes the items as discussed below

### AutoSign Processing Options

The user can choose to process the prescriptions in a number of different ways by selecting the appropriate check box for each individual item.

- Delivered-signed. Check this box when the recipient has signed for the item
- Note: Once the patient has signed and pressed "OK" on the signature pad, AutoSign will check this box automatically
- Delivered-not signed. Check this box if a patient received and item(s) and did not sign for it.
- Hold. Check this box if a prescription needs to be returned to the IntelliCab
- Note: Items that have been marked as "hold" must be recoupled before they are filed back into the IntelliCab
- RTS. Check this box when a patient does not receive the item and it is returned to stock (non-compliance)
- Destroy. Check this box when a patient does not receive an item and the item is not returned to stock

## Drive-thru Signature Capture (optional feature) WillCall Client

### **Performed in the WillCall Client (not IntelliSys). Be sure to close IntelliSys first**

1. The receipt is printed automatically when the last item is retrieved
2. Send the receipt to the patient to sign
3. Scan the receipt with the scanner
4. Scanning of receipts must be performed in sequence

## Bank Teller Dispensing (optional feature) WillCall Client

### **Performed in the WillCall Client (not IntelliSys). Be sure to close IntelliSys first**

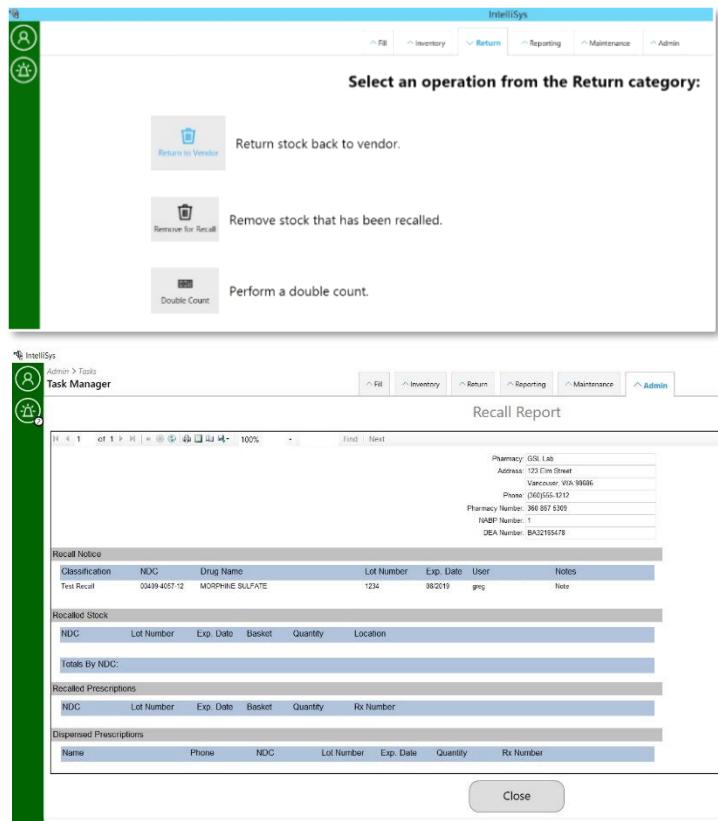
1. Start at the Entry [F1] screen.
2. Turn Bank Teller Mode on
3. Fill each prescription and return with them to the window
4. Scan each prescription in the Entry [F1] screen

5. Scan the patient's CAC card. The screen will automatically change to the Search [F2] tab and select all prescriptions for the patient, including all prescriptions already in will call
6. (If the CAC card does not scan, the prescriptions must be scanned into GSL. In this manual mode, once the prescriptions are handed to the patient, press the "Confirm Entire Pull" button to confirm.
7. Press [F12] to retrieve the prescription(s)
8. Hand the Bank Teller prescription(s) to the patient
9. Retrieve prescriptions from will call
10. MedGuides will begin printing automatically
11. The signature pad, if available, will populate for the patient's interaction
12. Once you have handed out all MedGuides and captured the patient's signature, IntelliSys will return to the Entry [F1] screen to continue with the next patient

## Recall

### Mark as Recalled for Return to Vendor

1. *Inventory > Mark as Recalled*
2. Select *New*  
**Note:** Select *Open* to view items previously marked for Recall
3. Choose *Recall Classification* from drop-down
4. Enter a *Note*. Notes will be included on Recall Report (*Reporting > Reports > Recall Report*)
5. Press *Create* (or press *Cancel* to dismiss)
6. Enter NDC, Lot #, Expiration.
7. Press *Add*
8. Press *Select* to process the Recall notice  
**Note:** Items marked as recalled will not be available for dispensing  
**Note:** A *Mark As Recall Report* task will be created in the **Error! Reference source not found..** The report is also available in *Reporting > Reports*



### Remove for Recall for Return to Vendor

**Note:** This process requires two persons

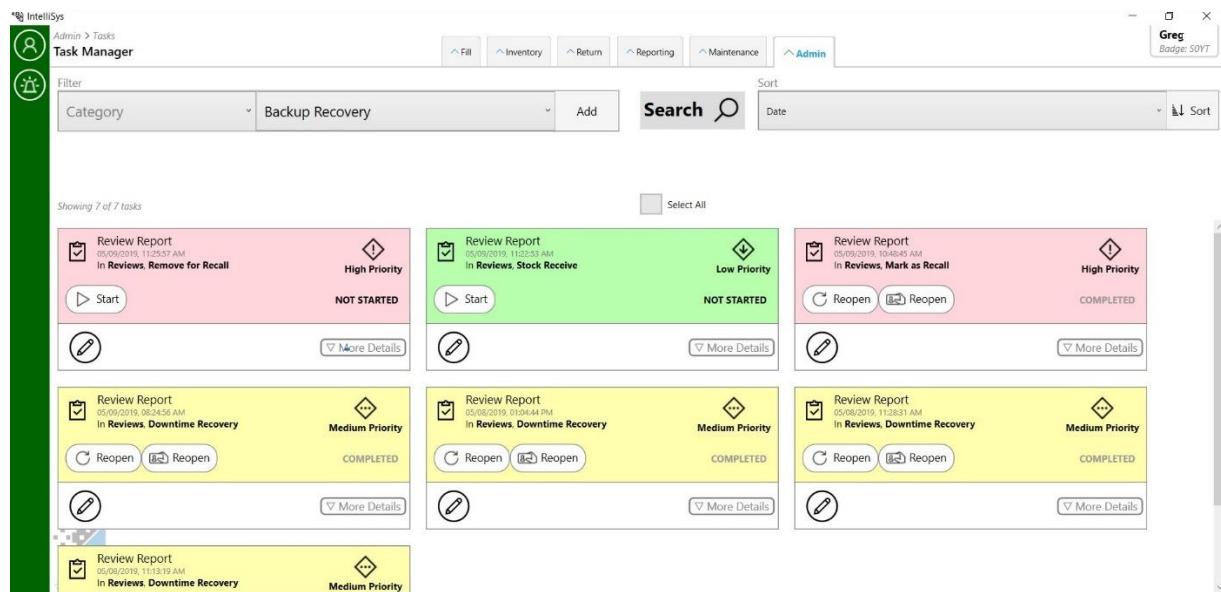
1. Navigate to *Return* tab
2. Initiate *Return to Vendor* or *Remove for Recall* function
3. Select *Isolation Vault*. Choose Dropped, Expired, Broken  
**Note:** Choose *Filter* if desired (NDC, Lot, Exp), input info then press *Add*
4. Press *Search*
5. Select item(s) or press *All*
6. Choose *Destroy Locally* or *Destroy with Vendor*
7. Enter demographics of 2<sup>nd</sup> person (or Vendor) handling destruction. If they have a GSL badge, they may scan to enter their information
8. Select drawer(s) and press *Pull*
9. Retrieve SmartBasket(s) and place on IntelliPad
10. Count medication and enter quantity to remove  
**Note:** Quantity needs to match system quantity
11. Follow remaining steps depending on whether the items are to be destroyed locally or returned to vendor
12. Place destruction/recall bottle(s) in appropriate location for pick-up  
**Note:** Make simultaneous adjustments in PMS if applicable

## If the medication is to be destroyed locally:

1. Second local person takes possession of the SmartBasket
2. Second local person goes to *Return > Double Count*
3. Second local person places SmartBasket on IntelliPad and enters Qty
4. Enter 222 #, Provider name and tracking number if shipping to vendor
5. Press *Submit*
6. *Return to Vendor or Remove for Recall* report is generated
7. Print 2 copies: one copy goes to the vendor if the medication is shipped; one stays on site.
8. Complete Return/Recall entries in PMS
9. **Note:** *Remove for Recall* review task is added to the **Error! Reference source not found..** Press *Start* on the tile, *Finish* when completed

## If the medication is to be returned to the vendor:

1. Vendor takes possession of the SmartBasket
2. Vendor goes to *Return > Double Count*
3. Vendor places SmartBasket on IntelliPad and enters Qty
4. Enter 222 # and Provider name
5. Press *Submit*
6. *Return to Vendor* report is generated
7. Print 2 copies: one copy goes with vendor; one stays on site with copy of documentation from vendor
8. Complete Return to Vendor entries in PMS
9. **Note:** *Remove for Recall* review task is added to the **Error! Reference source not found..** Press *Start* on the tile, *Finish* when completed
9. Retrieve IntelliVault Return to Vendor report (*Reporting > Reports*)



The screenshot shows the IntelliSys Task Manager interface. The top navigation bar includes 'Admin > Tasks', 'Task Manager', and buttons for 'Fill', 'Inventory', 'Return', 'Reporting', 'Maintenance', and 'Admin'. A user profile 'Greg' with badge 'SOYT' is shown. The main area is titled 'Filter' with dropdowns for 'Category' (set to 'Backup Recovery') and 'Search' (with a magnifying glass icon). A 'Sort' section with a dropdown for 'Date' and a 'Sort' button is also present. Below this, a message 'Showing 7 of 7 tasks' is displayed. The tasks are listed in a grid:

Task Details	Priority	Status
Review Report 05/09/2019, 11:25:57 AM In Reviews. Remove for Recall Start button, More Details button	High Priority	NOT STARTED
Review Report 05/09/2019, 11:22:33 AM In Reviews. Stock Receive Start button, More Details button	Low Priority	NOT STARTED
Review Report 05/09/2019, 11:48:45 AM In Reviews. Mark as Recall Reopen button, More Details button	High Priority	COMPLETED
Review Report 05/09/2019, 01:24:56 AM In Reviews. Downtime Recovery Reopen button, More Details button	Medium Priority	COMPLETED
Review Report 05/09/2019, 01:04:44 PM In Reviews. Downtime Recovery Reopen button, More Details button	Medium Priority	COMPLETED
Review Report 05/09/2019, 11:28:31 AM In Reviews. Downtime Recovery Reopen button, More Details button	Medium Priority	COMPLETED
Review Report 05/09/2019, 11:13:19 AM In Reviews. Downtime Recovery More Details button	Medium Priority	

## Return to Stock – 3 Scenarios

### Controlled Drug Return to Stock for stock product

#### **(Performed in WillCall Client)**

##### User must be authorized to pull controlled substances

1. Open **GSL WillCall Client** (not GSL IntelliSys) **Note:** you must close the IntelliSys Client before opening the GSL WCC Client
2. Navigate to *RTS (Return to Stock)* screen
3. Press *IntelliVault* sub-tab
4. Select Rx(s) to RTS
5. Press F12 or *Pull*
6. Authorized user retrieves all highlighted SmartBaskets from IntelliCab  
**Note:** If product is in IntelliVault, retrieval not required. Rx will automatically convert to available stock inventory
7. Remove Rx from SmartBasket and scan the Rx in PMS, then cancel the Rx in PMS
8. Blackout HIPAA info
9. Place Rx back in the same SmartBasket and put lid back on
10. Same user authenticates at IntelliVault and shelves all SmartBaskets pulled from IntelliCab into IntelliVault  
**Note:** The IntelliVault drawer will not have a pick light, simply authenticate to the appropriate size drawer  
**Note:** There is a default 5-minute timer from the time a CII is pulled from IntelliCab to the time it needs to be placed into IntelliVault  
**Note:** Make simultaneous adjustments in PMS if applicable

### Controlled Drug Return to Stock for Discontinued Rx (Once pulled for dispense)

1. Navigate to *Inventory > Receive*
2. Press *Return to Stock*
3. Place empty SmartBasket on IntelliPad
4. Scan barcode on Rx label. Contents will be received into dispensable inventory
5. Place a lid on the SmartBasket and shelf it into IntelliVault

### Controlled Drug Return to Stock for Discontinued Rx (Discontinued during RPh Verify)

##### User must be authorized to pull controlled substances

1. *GSL IntelliVault* client
2. *Fill > Rx Verification*
3. Place coupled Rx SmartBasket on IntelliPad
4. Double-count the Rx and press *OK*. Basket highlighter will turn green
5. RPh places lid on SmartBasket and shelves in WillCall IntelliCab  
**Note:** The person who verifies must shelf
6. Close GSL IntelliVault and open **GSL WCC**.  
**Note:** you must close the GSL IntelliVault Client before opening the GSL WCC Client.
7. Navigate to *RTS (Return to Stock)* screen
8. Press *IntelliVault* sub-tab
9. Select Rx(s) to RTS
10. Press F12 or *Pull*
11. Retrieve SmartBasket from IntelliCab

12. Remove Rx from SmartBasket and scan the Rx in PMS, then cancel the Rx in PMS
13. Blackout HIPAA info
14. Place Rx back in the same SmartBasket and put lid back on
15. Same user authenticates at IntelliVault and shelves all SmartBaskets pulled from IntelliCab into IntelliVault

**Note:** The IntelliVault drawer will not have a pick light, simply authenticate to the appropriate size drawer

**Note:** There is a default 5-minute timer (this is configurable) from the time a CII is pulled from IntelliCab to the time it needs to be placed into IntelliVault

**Note:** Make simultaneous adjustments in PMS if applicable

## Return items to stock that were not filled through IntelliSys

Used for prescriptions filled through Central Fill or Automation

1. Open **GSL WillCall Client** (not GSL IntelliSys) **Note:** you must close the IntelliSys Client before opening the GSL WCC Client

**Note:** Since the Rx has not been marked as a controlled substance in IntelliSys, anyone may pull it for return to stock
2. Navigate to *RTS (Return to Stock)* screen
3. Press *Aged & Non-Dispensable* sub-tab
4. Type in patient name
5. Press F12 or Pull
6. Authorized user retrieves highlighted SmartBasket(s) from IntelliCab

**Note:** If product is in IntelliVault, retrieval not required. Rx will automatically convert to available stock inventory
7. Remove Rx from SmartBasket and scan the Rx in PMS, then cancel the Rx in PMS
8. Blackout HIPAA info
9. To place product back in IntelliVault stock, either:
  - a. Use Receiving process to place product back in IntelliVault stock, or
  - b. Perform an Inventory Adjustment on an existing stock bottle and place returned stock in that bottle

**Note:** The Lot and Expiration Dates must be estimated

## Physical Inventory

1. Print PMS Inventory Report
2. Print IntelliSys Inventory Summary report
3. *Inventory > Inventory*
4. Select Inventory Type (e.g. Full, Custom, Last Touched)

**Note:** Last Touched is stock inventory that was received, filled, changed, or RTS'd (from will call cabinet). Use the Date Picker to select contiguous

dates. Days are always midnight to 11:59:59, so inventory from the current day will be from midnight to the current time of day.

5. Select *Filter* (e.g. NDC) Press *Add*, press *Search*
6. Select item(s) or select *All*, press *Pull*
7. If prompted, choose if second person will participate. If so, capture their demographics by scanning their ID Badge or manually entering  
**Note:** To join an inventory operation in progress, press *In Progress* and choose the current inventory operation
8. Press *Pull* again
9. Retrieve SmartBasket(s) and place on IntelliPad  
**Note:** If the SmartBasket has "Unknown Contents":
  - a. Place SmartBasket on IntelliPad
  - b. Navigate to *Inventory > Take Ownership*
  - c. Press *Reset Basket* (must have user permission)

Follow steps for appropriate action: **Note: For Error! Reference source not found., refer to Error! Reference source not found.**

- d. Stock Receive or Prescription Fill (Tech Fill, Pharmacist Verify)

10. Enter *Remaining Stock Quantity* and press *OK* or *Enter*  
**Note:** User has 3 attempts to enter correct blind-count. If incorrect after 3 attempts a user with appropriate permissions will need to perform an **Error! Reference source not found.** before proceeding  
**Note:** Must be simultaneous with quantity adjustments in PMS, if applicable
11. Repeat steps for all remaining baskets  
**Note:** Use the basket list to confirm that verified baskets are highlighted green
12. Same user authenticates at IntelliVault and shelves basket(s)
13. Repeat until inventory assignment is completed for all groups of baskets  
**Note:** At any time press *Done for Now* to pause inventory. Resume *Inventory > Inventory > In Progress*  
**Note:** a. IntelliVault Inventory Report is generated (*Reporting > Reports*)  
b. Compare IntelliVault Inventory Report with PMS Inventory Report (make adjustments as needed)

