Disclaimer:

This manual is licensed under the axiUm software and maintenance agreement. You may not use this manual except in compliance with the license. The information contained in these materials is proprietary and confidential to Exan and/or its subsidiaries or affiliates and is provided for the sole use of the individual or entity to whom it is addressed. These materials must be kept in the strictest confidence.

The contents of these materials are protected by federal and international intellectual property laws. The Exan logo is a registered trademark and is the sole and exclusive property of Exan.

These materials may contain third-party copyright and/or trademark materials, the use of which has not always been specifically authorized by the intellectual property owner. All copyrights and/or trademarks contained in these materials are the sole and exclusive property of their respective owners.

Information in this document is subject to change without notice. No portion of these materials may be reprinted, republished, modified, reproduced, sold, disseminated, disclosed or distributed in any form to any other party without the express written consent of Exan.

All names used in axiUm (whether online, in print, or any other media) are fictitious and are used herein for the purposes of example and demonstration on how to use axiUm. Any similarity to real people is a coincidence.

Copyright © 2011 Exan. All rights reserved.

Botan (http://botan.randombit.net/) is distributed under these terms:


Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:

1. Redistributions of source code must retain the above copyright notice, this list of conditions, and the following disclaimer.

2. Redistributions in binary form must reproduce the above copyright notice, this list of conditions, and the following disclaimer in the documentation and/or other materials provided with the distribution.

This software is provided by the author(s) "as is" and any express or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose, are disclaimed. In no event shall the author(s) or contributor(s) be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this software, even if advised of the possibility of such damage.
# Table of Contents

*About this Guide* ..................................................................................................................  v

*Document Conventions* .................................................................................................................. v
*Document Icons* ................................................................................................................................. vi

## Chapter 1: About Dispensary .................................................................................. 1

Opening the Dispensary Module .............................................................................. 1
About the Dispensary Window ............................................................................. 3
Dispensary Process .......................................................................................... 3
  - Dispensary Request Workflow ........................................................................ 4
  - Sterilization Workflow ............................................................................... 4
  - Lost-&-Found Workflow .......................................................................... 5
  - Dispensary Inventory Management Workflow ............................................. 5

## Chapter 2: Dispensary Setup ............................................................................. 7

Defining Dispensary & Sundry Items ................................................................ 8
  - Defining Instrument Types in axiUm .......................................................... 8
  - Defining Lifecycle of Instrument Types ..................................................... 9
  - Defining Sundry Types in axiUm ............................................................... 12
Building Kits ........................................................................................................ 14
  - Defining Kit Types .................................................................................. 15
    - Defining Kit Types that use Unique Bar Codes ........................................... 15
    - Defining Kit Types that use Generic Bar Codes ........................................ 18
Creating & Recording Individual Kits ................................................................ 20
Setting up Locations .......................................................................................... 22
  - Setting up Dispensary Locations .............................................................. 22
  - Setting up Dirty Locations ..................................................................... 25
  - Setting up Sterilization Locations ........................................................... 28
  - Setting up Transfer Carts ........................................................................... 30
Defining Minimum Dispensary Inventory Levels ........................................... 33
Adding Items to New Locations with no Existing Inventory .......................... 36
  - Adding Items that Use Unique Bar Codes .................................................. 37
Adding Items that Use Generic Bar Codes .................................................................39
Setting up Sterilization Requirements .................................................................42
  Setting up Number of Default Sterilization Days for Kits .......................................42
  Setting up Printers for Sterilization Labels ..........................................................45
  Setting up Sterilization Bar Code Printing for Workstations .................................46
    Enabling Sterilization Bar Code Usage ..............................................................46
    Enabling Individual Sterilization Bar Code Printing ..........................................48
    Enabling Batch Sterilization Bar Code Printing .................................................49
    Selecting Bar Code Font ....................................................................................51
Setting up for Dispensary Requests ...........................................................................52
  Setting up Automatic Dispensary Requests ..........................................................53
  Setting up Printouts for Manual Dispensary Requests ............................................55
Setting up the Bar Code Scanner .............................................................................57
  Defining Wait Time Between Scanning ..............................................................57
  Defining Scan Beeps ..........................................................................................59
Setting up Printers for Dispensary Printouts ............................................................60
Defining Out-of-Service Reasons ............................................................................61
Setting up Billing Codes ..........................................................................................63
Setting up Station Options for Dispensary .............................................................65

Chapter 3: Using Dispensary ..............................................................................67

Searching Dispensary Items & Activities ..............................................................67
Submitting Dispensary Requests ...........................................................................68
Searching Dispensary Records ..............................................................................68
  Searching for Dispensary Requests ....................................................................68
  Searching for Dispensary Items Scanned Out .....................................................69
  Searching for Disposable Items Scanned Out ....................................................70
  Searching for Kits Available at a Location ............................................................71
  Searching for Kit Inventory Levels at a Location ..................................................72
  Searching for Activity History of Dispensary Items .............................................73
  Searching for Instruments in axiUm ....................................................................75
  Searching for Lost Items ....................................................................................76
  Searching for Provider Account Balances .........................................................77
Deleting Dispensary Records ...............................................................................78
Checking Items Out ...............................................................................................79
Checking Items In ..................................................................................................83
  Checking in Used Items ....................................................................................84
  Checking in Unused Items ..................................................................................87
Managing Lost & Found Items ..............................................................................92
Chapter 4: Troubleshooting ................................................................. 139

Message Boxes .................................................................................. 139
About this Guide

This axiUm User Guide will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Dispensary module.
• Use axiUm features for day-to-day tasks.

The examples in the axiUm User Guide show system-required field entries and may not reflect field entries typical of your institution. Check with your institution for a list of fields required to be completed before saving the current window. axiUm will not let you save your entries until all system-required entries are completed. If you try saving a window with incomplete system-required fields, a message box displays. When you close the message box, the cursor will be placed on the first system-required field that you missed. Once all system-required fields are entered, you can save and close the window.

Also note that default displays, tabs in windows, and other screen elements shown in the axiUm User Guide may look different from your axiUm setup.

Document Conventions

This manual uses the following styles to identify the different interface elements:

<table>
<thead>
<tr>
<th><strong>Bold</strong></th>
<th>Names of interface elements such as buttons, check boxes, list boxes, list views, menu names, menu choices, options, tabs, and text boxes.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Italics</strong></td>
<td>Indicates when a special term is used for the first time, and to emphasize key words or terms.</td>
</tr>
<tr>
<td><strong>Monospace Fonts</strong></td>
<td>Data entered by the user.</td>
</tr>
</tbody>
</table>
## Document Icons

This guide also uses the following icons to identify the different document elements:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🆕️</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>🚨</td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
<tr>
<td>🍏</td>
<td>Challenges and extra steps. For example, steps that take you beyond the basic procedures.</td>
</tr>
</tbody>
</table>
Dispensary staff can use the Dispensary module to:

- Oversee the inventory levels of instruments and kits in your dispensary location.
- Manage the timely allocation of dispensary items requested by providers.
- Track the dispensary usage of each provider.
- Enforce sterilization compliance for all instruments.
- Maintain accountability for lost or broken items.

Students can use the Dispensary module to ensure reservation and timely delivery of requested instruments, kits, and sundries.

This chapter covers the following topics:

- Opening the Dispensary module
- About the Dispensary window

Read the following sections to familiarize yourself with the features of the Dispensary module.

1 Opening the Dispensary Module

There are different methods to access the Dispensary module:

- Icon
- Actions menu
- Desktop
The following instructions describe these methods.

▼ To open the Dispensary module using the icon:

Click  

(Dispensary).

▼ To open the Dispensary module using the Actions menu:

From the Actions menu, click Dispensary.

▼ To open the Dispensary module using the Desktop:

From the Desktop, click  

(Dispensary).

The next section describes the Dispensary module window.
2 About the Dispensary Window

This is how the Dispensary window may look when you open it for the first time:

You are now ready to begin using the Dispensary window.

3 Dispensary Process

This section describes the dispensary workflows within the dispensary process. The workflows outlined in this section reflect axiUm’s intended use of the Dispensary module. Following these workflows will help you efficiently manage your institution’s dispensary process.

This section covers the following workflows:

- Dispensary request workflow
- Sterilization workflow
- Lost-and-found workflow
- Dispensary inventory management workflow
### 3.1 Dispensary Request Workflow

- **Student makes an electronic dispensary request.**
- **Dispensary staff uses the Dispensary module to find the student’s request.**
- **On appointment day, student arrives at dispensary location. Dispensary staff checks out the item for the student.**
- **After appointment, student returns the item. Dispensary staff checks in the kit for the student.**

### 3.2 Sterilization Workflow

- **Sterilization location:** Student returns used item and sterilization staff checks in the item.
- **Washing unit:** Used items are cleaned.
- **Autoclave:** Clean items are sterilized, and given outer bar codes (proof of sterilization).
- **Dispensary location:** Sterilized items are returned to their original location. Dispensary staff can check out items for students.
3.3 Lost-&-Found Workflow

Student reports to the dispensary location they lost an item.

Dispensary staff finds the student's checked-out item and indicates in the Dispensary module s lost. axiUm automatically creates a balance owing on the student's account.

Dispensary worker bills the student the replacement cost of the lost kit.

Dispensary worker receives payment from student.

Student finds lost kit and returns it to the dispensary location.

Dispensary staff gives student refund. This clears the student's account.

3.4 Dispensary Inventory Management Workflow

Check inventory level of Location1 (shortfall).

Check inventory level of Location2 (surplus).

Transfer items in axiUm.

Physically transfer items from Location2 to Cart1.

Physically transfer items from Cart1 to Location1.
This chapter covers the setup tasks you must complete before using the Dispensary module. You must have access rights (i.e., administrator access level) to access some of these windows.

This chapter covers the following topics:

- Defining dispensary & sundry items
- Building kits
- Setting up locations
- Setting up dispensary inventory levels
- Adding inventory records to new dispensary locations
- Setting up sterilization requirements
- Setting up automatic dispensary requests
- Setting up bar code scanning
- Setting up dispensary printers
- Defining out-of-service reasons
- Setting up billing codes
- Setting up station options for dispensary

At the end of this chapter you will be familiar with these tasks.

Before you set up the Dispensary module, you must carefully analyze the needs of your institution’s dispensary process. Review the Dispensary module’s various workflow for dispensary requirements specific to your institution’s dispensary process. For information on the Dispensary module’s various workflow, see Dispensary Process on page 3.
1 Defining Dispensary & Sundry Items

You must create a record of all instruments types. Then later you can use these instrument records to build templates for each kit type. Remember to also create a record of all disposable type items.

This section covers the following topics:

- Defining instruments types in axiUm
- Defining lifecycle of instrument types
- Defining sundry types in axiUm

1.1 Defining Instrument Types in axiUm

You must enter each instrument type in axiUm. Later you can group instruments into kits (e.g. radiology kits) and track each instrument inside the kit for sterilization, loss/breakage, and lifecycle.

For this example, we will enter an instrument type called #21 Miller Bone File.

▼ To enter an instrument type in axiUm:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Instruments icon.

axiUm displays the Instrument Codes window. For information on the Instrument Codes window, refer to the axiUm Reference Manual for Maintenance and see Instrument Codes Window on page 102.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
• Code: BF21
• Description: #21 Miller Bone File
• Amount: 3045.00

5. Click \( \text{Add a new Record} \).

    axiUm saves the new record and displays it in the list view.

6. Click \( \text{Close} \).

    axiUm closes the Instrument Codes window and returns to the Maintenance window.

You have successfully defined an instrument type in axiUm.

You can further define this instrument type by defining its life cycle. For instructions on defining a kit type’s life cycle, see *Defining Lifecycle of Instrument Types* on page 9.

### 1.2 Defining Lifecycle of Instrument Types

All instruments must have a lifecycle. An instrument’s lifecycle can be defined as the number of times used (number of times checked out), or the number of times sterilized (number of times it goes through the autoclave; if the item was checked out but never opened, it does not reduce the count). At the end of its lifecycle, the instrument must be disposed and replaced with a new one.

For this example, we will set up the lifecycle for the instrument type #21 Miller Bone File, with a lifecycle based on the number of times used.

\[ \text{▼ To define the lifecycle of instrument types:} \]

1. Go to Maintenance module’s Dispensary tab.
2. Double-click the Instruments icon.
axiUm displays the Instrument Codes window. For information on the Instrument Codes window, refer to the axiUm Reference Manual for Maintenance and see Instrument Codes Window on page 102.

3. From the list view, highlight an item. For our example, we will select #21 Miller Bone File.

4. In the Life Cycle field, enter the life cycle of the instrument. For our example, we will enter 500.

5. Click (Modify Record).

axiUm saves the changes.

6. Click (Close).

axiUm closes the Instrument Codes window and returns to the Maintenance window.
7. Go to the **Dispensary** module.

8. Click **Setup**.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see *Dispensary Setup Window* on page 21.
9. Go to the **System Options** section, and in **Calculate Lifecycle based on** section, select the **Number of times used?** option.

![Image of System Options settings]

10. Click **OK**.

    axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully set up the lifecycle of an instrument type.

### 1.3 Defining Sundry Types in axiUm

Sundries are items not tracked in axiUm for inventory levels, and are normally not expected to be returned once checked out (e.g. latex gloves). However, you must define sundry types so that providers can request for them.

For this example, we will create the sundry item Small Masks. This will display below the currently existing heading Masks.

▶ **To enter a sundry type in axiUm:**

1. Go to **Maintenance** module's **Dispensary** tab.
2. Double-click the **Sundries** icon.
axiUm displays the Sundry List window. For information on the Sundry List window, refer to the axiUm Reference Manual for Maintenance and see Sundry List Window on page 118.

3. Go to the heading Masks and click on +.

axiUm expands the heading and displays any items in the heading.

4. Click on + (Create a new Record).

axiUm displays the Sundry Code window. For information on the Sundry Code window, refer to the axiUm Reference Manual for Maintenance and see Sundry Code Window on page 120.

5. Enter the fields and options. For our example, we will enter the following:

   • Code: 4001
   • Node Level: Level 2
   • Description: Small Mask
   • Is this a Sundry (not a header)?: selected
• Disposable Item: selected
• Bar Code: SMLM

6. Click OK.

axiUm saves the new record, closes the Sundry Code window, returns to the Sundry List window, and displays the new record in the list view.

7. Click (close).

axiUm closes the Sundry List window.

You have successfully defined a sundry type in axiUm.

2 Building Kits

Before you build your kit types, make sure that you have defined all instrument types in axiUm. For instructions on defining instrument types, see Defining Instrument Types in axiUm on page 8.

Once you have created instrument records, you can use them to build templates for each kit type. To build kit type templates, you will be adding instrument records into each kit type definition.
This section covers the following topics:

- Defining kit types
- Creating and recording individual kits

2.1 Defining Kit Types

You must first define a template containing a set of instruments, then later you must apply the same template to other similar kit types to record in axiUm.

This section covers the following topics:

- Defining kit types that use unique bar codes
- Defining kit types that use generic bar codes

Defining Kit Types that use Unique Bar Codes

Typically all kits use unique bar codes. This differentiates one kit of a kit type from another kit of the same kit type. Distinguishing each kit from another helps keep track of their activities and history:

- A scanned out kit is associated to the provider who checked it out.
- Sterilization activity and history of each kit is tracked.
- Lifecycle of a kit can be calculated, because they are based on either the number of times used or the number of times sterilized, depending on your dispensary location’s setup.

For this example, we will define the kit type called Post Grad Crown and Bridges Cassette, and enable it for the assignment of unique bar codes for each kit of this kit type.

▼ To define a kit type that uses unique bar codes:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Kit Type icon.
axiUm displays the Kit Type Codes window. For information on the Kit Type Codes window, refer to the axiUm Reference Manual for Maintenance and see *Kit Type Codes Window* on page 103.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Code: PGCB
   - Description: Post Grad Crown & Bridge Cass.
   - Amount: 35.00
   - Individual kits have bar codes on them: selected

5. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.
6. From the list view, highlight the new kit type record you added.

7. Click **Kit Item Templates**.

   axiUm displays the Kit Item Templates window. For information on the Kit Item Templates window, refer to the axiUm Reference Manual for Maintenance and see *Kit Item Templates Window* on page 106.

![Kit Item Templates Window](image)

8. Enter the fields and options. For our example, we will enter the following:

   - **Instrument**: 4-20, #6 Knife Handle [DSNE]
   - **Quantity in Kit**: 1

9. Click **Add a new Record**.

   axiUm saves the new record and displays it in the list view.

![Add a new Record](image)

10. Click **Close**.

    axiUm closes the Kit Item Templates window and returns to the Kit Type Codes window.

11. Click **Close**.

    axiUm closes the Kit Type Codes window and returns to the Maintenance window.
You have successfully defined a kit type in axiUm that uses unique bar codes, and set up a template of instruments to be placed in it.

Kits using unique bar codes require a different sterilization process than kits using generic bar codes. For instructions on sterilizing kits that use unique bar codes, see Sterilizing Items that use Unique Bar Codes on page 108.

Defining Kit Types that use Generic Bar Codes

While typically kits use unique bar codes, some kits use generic bar codes. This does not differentiate one kit of this kit type from another kit of the same type. Because each kit is not uniquely identified, they are not associated to the provider who checked out the kit, sterilization is not tracked, and lifecycle cannot be calculated. For some kit types (e.g. handpieces), this OK.

For this example, we will define the kit type called Handpiece, and enable it for the assignment of a generic bar code that all kits of this type will all share.

▼To define a kit type that uses generic bar codes:

1. Go to Maintenance module’s Dispensary tab.
2. Double-click the Kit Type icon.

axiUm displays the Kit Type Codes window. For information on the Kit Type Codes window, refer to the axiUm Reference Manual for Maintenance and see Kit Type Codes Window on page 103.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
• Code:  HANDP
• Description:  Handpiece
• Amount:  17.00
• Individual kits have bar codes on them: deselected
• Bar Code:  110220330

5. Click  (Add a new Record).

axiUm saves the new record and displays it in the list view.

6. From the list view, highlight the new kit type record you added.

7. Click  (Kit Item Templates).

axiUm displays the Kit Item Templates window. For information on the Kit Item Templates window, refer to the axiUm Reference Manual for Maintenance and see Kit Item Templates Window on page 106.

8. Click  (Clear Data).

axiUm clears some of the fields and options.
9. Enter the fields an options. For our example, we will enter the following:

- **Instrument:** 112233, Handpiece
- **Quantity in Kit:** 1

10. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

11. Click (Close).

axiUm closes the Kit Item Templates window and returns to the Kit Type Codes window.

12. Click (Close).

axiUm closes the Kit Type Codes window and returns to the Maintenance window.

You have successfully defined a kit type in axiUm that uses a generic bar code, and set up a template consisting of one instrument (the handpiece) to be placed in it.

Kits using a generic bar code requires a different sterilization process than kits using unique bar codes. For instructions on sterilizing kits that use generic bar codes, see *Sterilizing Items that use Generic Bar Codes* on page 112.

### 2.2 Creating & Recording Individual Kits

For kits that use unique bar code, you must assign each kit a unique ID to differentiate one kit of one kit type from another kit of the same kit type. This section explains how to do this.

For kits that use generic bar codes, you can skip this section. There is no need to differentiate kits of the same type.
Before you create kits, you must first define kit types. For information on defining kit types, see **Defining Kit Types** on page 15. Then you must physically insert the instruments into each kit. Now you are ready to assign each kit a unique bar code.

For this example we will create a kit for the kit type called Post Grad Crown and Bridges Cassette.

**▼To record individual kits:**

1. Go to **Maintenance** module's **Dispensary** tab.
2. Double-click the **Kits** icon.

   axiUm displays the Instrument Kits List window. For information on the Instrument Kits List window, refer to the axiUm Reference Manual for Maintenance and see **Instrument Kits List Window** on page 108.

3. Click on (Create a new Record).

   axiUm displays the Instrument Kits window. For information on the Instrument Kits window, refer to the axiUm Reference Manual for Maintenance and see **Instrument Kits Window** on page 109.

4. Enter the fields and options. For our example, we will enter the following:
• **Code:** 01PGCB0025  
• **Kit Type:** PGCB, Post Grad Crown & Bridge Cass.

5. Click **OK**.

axiUm saves the new record, closes the Instrument Kits window, returns to the Instrument Kits List window, and displays the new record in the list view.

You have successfully recorded a single kit in axiUm. Continue doing this until all kits of this kit type are recorded in axiUm with a unique kit code (e.g. 01PGCB0026, 01PGCB0027, 01PGCB0028, etc.).

If inventory count is in progress, and you create a new record in the Instrument Kits window (or you deselect the Out of Service checkbox when modifying an existing record), axiUm asks if you want to add this kit to the count in progress. For instructions on dispensary inventory counting, see *Processing Inventory Counts* on page 130.

### 3 Setting up Locations

This section covers the following topics:

- Setting up dispensary locations
- Setting up dirty locations
- Setting up sterilization locations
- Setting up transfer carts

#### 3.1 Setting up Dispensary Locations

Dispensary locations refer to stationary areas where dispensary activities such as the borrowing and returning of instruments occur.

For this example, we will create and define a dispensary location called 1st Floor Dispensary.
To set up your dispensary activity locations:

1. Go to **Maintenance** module's **Dispensary** tab.
2. Double-click the **Dispensary Location Codes** icon.

   axiUm displays the Dispensary Location Codes window. For information on the Dispensary Location Codes window, refer to the axiUm Reference Manual for Maintenance and see *Dispensary Location Codes Window* on page 98.

3. Click (Clear Data).

   axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - **Code:** DISP1
   - **Description:** 1st Floor Dispensary
   - **Type:** Dispensary

5. Click (Close).
axiUm saves the new record and displays it in the list view.

6. Click (Close).

axiUm closes the Dispensary Location Codes window and returns to the Maintenance window.

You must now define your dispensary location’s workstation setup. This setup applies to the current workstation only. Each workstation at each dispensary location must complete their own dispensary location setup.

7. Go to the Dispensary module.
8. Click Setup.
axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

9. Go to the Workstation Defaults section and in the Dispensary drop-down field, select DISP1, 1st Floor Dispensary.

10. Click OK.

axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully set up permanent dispensary locations. When you scan out items for providers, axiUm checks out the kit record from this location.

3.2 Setting up Dirty Locations

Dirty dispensary locations refer to stationary areas or carts reserved for used items. This prevents the mixing of dirty items with clean ones.

For this example, we will create and define a stationary (permanent) location for students to drop off returned items, called Dirty 1.

To set up your dirty location:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Location Codes icon.
axiUm Version 5.0

axiUm displays the Dispensary Location Codes window. For information on the Dispensary Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Location Codes Window on page 98.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:

   • Code: DIRTY1
   • Description: Dirty 1
   • Type: Dispensary

5. Click (Close).

axiUm saves the new record and displays it in the list view.
6. Click \(\times\) (Close).

axiUm closes the Dispensary Location Codes window and returns to the Maintenance window.

You must now define your dispensary location’s workstation setup. This setup applies to the current workstation only. Each workstation at each dispensary location must complete their own dispensary location setup.

7. Go to the Dispensary module.
8. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

9. Go to the Workstation Defaults section, and in the Dirty Location drop-down field, select DIRTY1, Dirty 1.

10. Click OK.

axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully set up a dirty dispensary location. When you scan in returned items, axiUm moves the item’s record to this location.
3.3 Setting up Sterilization Locations

Sterilization locations refer to rooms containing autoclaves, where disinfected items await for transfer back to their original dispensary locations.

For this example, we will create and define a sterilization location called Auxiliary Sterilization.

▼To set up your dispensary activity locations:

1. Go to Maintenance module’s Dispensary tab.
2. Double-click the Dispensary Location Codes icon.

axiUm displays the Dispensary Location Codes window. For information on the Dispensary Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Location Codes Window on page 98.

3. Click (Clear Data).

axiUm clears the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - Code: CSF2
   - Description: Auxiliary Sterilization
   - Type: Sterilization

5. Click (Close).
axiUm saves the new record and displays it in the list view.

6. Click (Close).

axiUm closes the Dispensary Location Codes window and returns to the Maintenance window.

You must now define your dispensary location’s workstation setup. This setup applies to the current workstation only. Each workstation at each dispensary location must complete their own dispensary location setup.

7. Go to the **Dispensary** module.
8. Click **Setup**.
axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see *Dispensary Setup Window* on page 21.

9. Go to the **Workstation Defaults** section.

10. Enter the fields and options. For our example, we will select the following:

    - **Sterilize Transfer:** CSF, Central Sterilization
    - **Batch Sterilization:** CSF, Central Sterilization

11. Click **OK**.

    axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully set up permanent dispensary locations.

### 3.4 Setting up Transfer Carts

Transfer carts refer to mobile locations, such as carts and baskets, used for the transfer of kits between permanent dispensary locations.

For this example, we will create and define a mobile location called Cart 11.
To set up transfer carts:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Location Codes icon.

   axiUm displays the Dispensary Location Codes window. For information on the Dispensary Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Location Codes Window on page 98.

3. Enter the fields and options. For our example, we will enter the following:
   - Code: CART11
   - Description: Cart 11
   - Type: Cart

4. Click (Close).

   axiUm saves the new record and displays it in the list view.

5. Click (Close).
axiUm closes the Dispensary Location Codes window and returns to the Maintenance window.

You must now define your dispensary location’s workstation setup. This setup applies to the current workstation only. Each workstation at each dispensary location must complete their own dispensary location setup.

6. Go to the **Dispensary** module.
7. Click **Setup**.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see **Dispensary Setup Window** on page 21.

8. Go to the **Workstation Defaults** section, and in the **General Transfer** drop-down field, select **CART11, Cart 11**.
9. Click **OK**.

axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully set up a mobile dispensary location. You can use this cart to transfer sterilized items back to their dispensary locations, or to move inventory from one location to another during inventory re-allocation. For instructions on transferring items using a cart, see **Transferring Items Using Transfer Carts** on page 103.
4 Defining Minimum Dispensary Inventory Levels

The minimum dispensary level is the minimum number of kits that a location must always carry. The minimum dispensary level can be the number of total kits that a dispensary location must carry, or the number of extra kits that they must carry.

For this example, we will define the minimum dispensary inventory level for 2nd Floor Dispensary, and indicate that the minimum inventory level set up is the total kits the location must carry.

▼To define the minimum dispensary level for a location:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Location Codes icon.

axiUm displays the Dispensary Location Codes window. For information on the Dispensary Location Codes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Location Codes Window on page 98.

3. From the list view, highlight a location code. For our example, we will select DISP2, 2nd Floor Dispensary.
4. Click on (Dispensary Levels).
axiUm displays the Dispensary Levels window. For information on the Dispensary Levels window, refer to the axiUm Reference Manual for Maintenance and see *Dispensary Levels Window* on page 100.

Now you must add a kit type that this location will carry. For our example, we will add the kit type called Post Grad Crown and Bridges Cassette.

5. Click (Clear Data).

axiUm clears some of the fields and options.

6. Enter the fields and options. For our example, we will enter the following:

   - **Kit Type**: PGCB, Post Grad Crown & Bridge Cass.
   - **Minimum Level**: 35

7. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

8. Click (Close).

axiUm closes the Dispensary Levels window and returns to the Dispensary Location Codes window.
9. Click (Close).

axiUm closes the Dispensary Location Codes window and returns to the Maintenance window.

Now you must refine the definition of minimum dispensary level for your dispensary location. This setup applies to the current workstation only. Each workstation at each dispensary location must complete their own dispensary location setup.

10. Go to the Dispensary module.

11. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.
12. Go to the **System Options** section, and in the **Minimum dispensary levels are section**, select the **Number of total kits required** option.

<table>
<thead>
<tr>
<th>System Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use kit types in batches?</td>
</tr>
<tr>
<td>Calculate U.S. cap based on</td>
</tr>
<tr>
<td>Number of lots used?</td>
</tr>
<tr>
<td>Number of lots sterilized?</td>
</tr>
<tr>
<td>Minimum dispensary levels are</td>
</tr>
<tr>
<td>Number of extra kits required</td>
</tr>
<tr>
<td>Number of total kits required</td>
</tr>
<tr>
<td>Sterilization adds outer bar codes?</td>
</tr>
<tr>
<td>Outer bar codes generated from player files?</td>
</tr>
<tr>
<td>Outer bar code label printed in batch?</td>
</tr>
<tr>
<td>Use kit type defaults for sterilization periods?</td>
</tr>
<tr>
<td>What if sterile and non-sterile items are mixed?</td>
</tr>
<tr>
<td>What if picking out kits that aren’t currently at that location?</td>
</tr>
</tbody>
</table>

13. Click **OK**.

axiUm saves the changes, closes the Dispensary Setup window, and returns to the Dispensary window.

You have now successfully defined the minimum dispensary level for a kit type in a location.

Now that you have defined the minimum inventory levels for a dispensary location, you can physically move inventory to that location (e.g. from the central warehouse to the main dispensary location), where you can scan the new items so that axiUm can associate the dispensary items to its rightful location.

5 Adding Items to New Locations with no Existing Inventory

If a dispensary location is new, you must associate the newly arrived items to this location so that axiUm has a record of what is available. In other words, you are appending items to a new location where the current dispensary inventory count is zero. Without inventory associated to the location, this location’s Kit In tab will show nothing in the list view. Once items are added to the dispensary location, providers can check out items from axiUm.

Before you begin, make sure you have set up your minimum dispensary levels for this kit type at this dispensary location. For instructions on setting up a dispensary location’s minimum dispensary levels, see **Defining Minimum Dispensary Inventory Levels** on page 33. Otherwise axiUm will disallow you from scanning the items. For example, if this location is not set up to have radiology kits, scanning a radiology kit will cause axiUm to reject the item. Similarly, if you are set up to have only 10 ortho kits, scanning the 11th item will cause axiUm to reject this kit.

If you are working at a pre-existing dispensary location and you missed items during the dispensary inventory count process, you can use this same process to append the missed items to the final count.
This section covers the following:

- Adding items that use unique bar codes
- Adding items that use generic bar codes

### 5.1 Adding Items that Use Unique Bar Codes

Before you begin, make sure you have set up your minimum dispensary levels for this kit type at this dispensary location. For instructions on setting up a dispensary location’s minimum dispensary levels, see *Defining Minimum Dispensary Inventory Levels* on page 33.

When you add items that use unique bar codes, the items are scanned into axiUrn individually so that each item has a record of itself.

For this example, we will add the item Post Grad Crown and Bridges Cass.

**To add inventory items to a new location with zero inventory:**

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Count Processes icon.

   axiUrn displays the Dispensary Count Processes window. For information on the Dispensary Count Processes window, refer to the axiUrn Reference Manual for Maintenance and see *Dispensary Count Processes Window* on page 91.

3. Click **Append**.
axiUm displays the Dispensary Count window. For information on the Dispensary Count window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Count Window on page 92.

4. In the **Kit** field, scan the outer bar code on the item.

5. Press **ENTER**.

6. **Click Yes.**

   axiUm has now allowed this location to be a participating location for dispensary inventory counts.
axiUm displays the scanned item in the list view.

7. When you have finished scanning all new items at this dispensary location, click **Process**.

   axiUm appends the items in the list view into the dispensary count.

8. Click **Close**.

   axiUm closes the Dispensary Count window.

You have now successfully recorded all new inventory at this dispensary location.

### 5.2 Adding Items that Use Generic Bar Codes

For this example, we will add the generic kit type called Handpiece.

Before you begin, make sure you have set up your minimum dispensary levels for this kit type at this dispensary location. For instructions on setting up a dispensary location’s minimum dispensary levels, see *Defining Minimum Dispensary Inventory Levels* on page 33.

When you add items that use generic bar codes, the items are scanned into axiUm in batches, and all items of this kit type share a single record.

**To add inventory items to a new location with zero inventory:**

1. Go to **Maintenance** module's **Dispensary** tab.
2. Double-click the **Dispensary Count Processes** icon.
axiUm displays the Dispensary Count Processes window. For information on the Dispensary Count Processes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Count Processes Window on page 91.

3. Click Append.

axiUm displays the Dispensary Count window. For information on the Dispensary Count window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Count Window on page 92.

4. In the Kit field, scan the outer bar code on the item. For our example, we will enter 110220330, HANDP, Handpiece.

5. Press Enter.

Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.
Adding Items to New Locations with no Existing Inventory

axiUm displays the Dispensary Batch Count window. For information on the Dispensary Batch Count window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Batch Count Window on page 94.

6. In the **Number to Count** field, enter the number of this item at your dispensary location. For our example, we will enter 20.

7. Click **OK**.

Because this is the first time this dispensary location has participated in an inventory count, axiUm displays the following window:

8. Click **Yes**.

axiUm has now allowed this location to be a participating location for dispensary inventory counts.

axiUm displays the scanned item in the list view.

9. When you have finished scanning all new items at this dispensary location, click **Process**.

axiUm appends the items in the list view into the dispensary count.

10. Click **Close**.

axiUm closes the Dispensary Count window.

You have now successfully recorded all new inventory at this dispensary location.
6 Setting up Sterilization Requirements

This section covers the following topics:

- Setting up number of default sterilization days for kits
- Setting up printers for sterilization labels
- Setting up sterilization bar code printing for workstations

6.1 Setting up Number of Default Sterilization Days for Kits

Kits are only sterile for a period of time. When this time expires, you must re-sterilize the kits even if they have not been used since last sterilization. This section explains how to set the default number of days that a kit remains sterile.

Individual instruments within each kit are not tracked for sterilization. However, instruments are associated to a specific kit, and this kit is tracked for sterilization. axiUm tracks a kit’s sterilization by applying the sterilization (outer) bar code to the kit and associating this to the kit (inner) bar code. The outer bar code then becomes proof of sterilization, and scanning this bar code (at check-out) after sterilization expiration will notify you of it.

To set up the number of default sterilization days:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Kit Types icon.

   axiUm displays the Kit Type Codes window. For information on the Kit Type Codes window, refer to the axiUm Reference Manual for Maintenance and see Kit Type Codes Window on page 103.

3. From the list view, highlight a kit type code. For our example, we will select PGCB, Post Grad Crown & Bridge Cass.
4. In the **Default Sterilization __ (in days)** field, enter the number of days this kit remains sterile. For our example, we will enter 90.

5. Click ![Modify Record](image).  

axiUm saves the changes.

axiUm saves the new record and displays it in the list view.

6. Click ![Close](image).  

axiUm closes the Kit Type Codes window and returns to the Maintenance window.

7. Go to the **Dispensary** module.

8. Click **Setup**.
axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

9. Go to the System Options section.

10. Select the Use kit type defaults for sterilization periods? checkbox.

11. Click OK.

axiUm saves the changes and closes the Dispensary Setup window.

You have now successfully set up default sterilization days for a kit type. When this kit’s sterilization expires, you must re-sterilize it even if it has not been used since it was last sterilized. For instructions on sterilizing kits, see Sterilizing Items on page 108.
6.2 Setting up Printers for Sterilization Labels

When items are sterilized, a sterilization bar code is placed on the kit as proof of sterilization. These bar codes are printed to the default printer. This section explains how to set up your default sterilization printer.

To set up a printer for sterilization labels:

1. Go to the Dispensary module.
2. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

3. Go to the Sterilization Printout section.
4. Go to the Default Printer and click (ellipsis).

axiUm displays the Select Printer window to select from.

5. From the list box, highlight a printer name.
6. Click Select.

axiUm saves your selection, closes the Select Printer window, and returns to the Dispensary Setup window.
7. Click OK.
axiUm saves the changes.

8. Click (Close).

axiUm closes the Dispensary Setup window and returns to the Dispensary window.

You have now successfully set up your workstation printer for printing sterilization labels.

6.3 Setting up Sterilization Bar Code Printing for Workstations

This section covers the following topics:

- Enabling sterilization bar code usage
- Enabling individual sterilization bar code printing
- Enabling batch sterilization bar code printing
- Selecting bar code font

Enabling Sterilization Bar Code Usage

If you want the sterilization process to include the printing of sterilization bar codes, you must indicate this in axiUm. Otherwise, scanning items at your sterilization location prints nothing to the associated bar code printer.
To enable sterilization bar code usage:

1. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see *Dispensary Setup Window* on page 21.

2. Go to the **System Options** section.

3. Select the **Sterilization adds out bar code?** checkbox.

4. Click **OK**.

axiUm saves the changes and closes the Dispensary Setup window.
You have now successfully enabled this sterilization location’s workstation to print sterilization bar codes, and indicated that these sterilization bar codes are generated by axiUmm.

Enabling Individual Sterilization Bar Code Printing

You can set up axiUmm to print sterilization bar codes individually as you scan each item that comes through the sterilization location.

▼To enable individual sterilization bar code printing:

1. Click Setup.

axiUmm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUmm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

2. Go to the System Options section.

3. Enter the fields and options. For our example, we will enter the following:

   - Dispenser Defaults
     - Dispenser
     - Daily Location
     - Sterilize Transfer
     - Batch sterilize
     - General Transfer

   - System Options
     - Lock Provider when balance >
     - Number of times used?
     - Number of times sterilized?
     - Minimum dispense quantity:
     - Number of extra labels required
     - Number of extra labels required

   - Sterilization bar code printing:
     - Bar code data generated from the application?
     - Bar code labels printed in batches?

   - Dispense Bar Codes
     - Default Printer
     - Regular Font
     - Bar Code Font
     - Start Character
     - Stop Character

48
• Sterilization adds out bar code?: selected
• Outer bar codes generated from this application?: selected

4. Click OK.

axiUm saves the changes and closes the Dispensary Setup window.

You have now successfully enabled this sterilization location’s workstation to print sterilization bar codes individually. When you scan an item at this sterilization location, it will allow you to print them as you scan each item into axiUm. If you have a default sterilization printer set up, axiUm sends the print job to this printer. For instructions on setting up default sterilization printers, see Setting up Printers for Sterilization Labels on page 45.

Because you have indicated to use axiUm (rather than a separate application) to generate bar codes, you must select the bar code font for axiUm to use when printing sterilization bar codes. For instructions, on selecting bar code fonts, see Selecting Bar Code Font on page 51.

You can also set up axiUm to print sterilization bar codes in batches, after all items have been scanned at the sterilization location. For instructions on setting up axiUm to print sterilization bar codes in batches, see Enabling Batch Sterilization Bar Code Printing on page 49.

Enabling Batch Sterilization Bar Code Printing

You can set up axiUm to hold off the printing of sterilization bar codes until all items at the sterilization location have been scanned into axiUm, then print them in a single print job.
To enable batch sterilization bar code printing:

1. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

2. Go to the System Options section.

3. Enter the fields and options. For our example, we will enter the following:
   - Sterilization adds out bar code?: selected
   - Outer bar codes generated from this application?: selected
   - Outer bar code labels printed in batch?: selected

4. Click OK.
axiUm saves the changes and closes the Dispensary Setup window.

You have now successfully enabled this sterilization location’s workstation to print sterilization bar codes in batches. When you scan an item at this sterilization location, it will not give you the option to print. Once all items have been scanned in, you can print all the labels in a single print job. For instructions on printing sterilization bar codes in a single print job, see *Printing Sterilization Bar Codes in Batches* on page 115.

Because you have indicated to use axiUm (rather than a separate application) to generate bar codes, you must select the bar code font for axiUm to use when printing sterilization bar codes. For instructions on selecting bar code fonts, see *Selecting Bar Code Font* on page 51.

You can also set up axiUm to print sterilization bar codes individually, after each item is scanned at the sterilization location. For instructions on setting up axiUm to print sterilization bar codes individually, see *Enabling Individual Sterilization Bar Code Printing* on page 48.

**Selecting Bar Code Font**

If you indicated that you want axiUm (rather than a separate application) to generate sterilization bar codes, you must select the bar code font for axiUm to use when printing these.

For instructions on setting up axiUm to generate sterilization bar codes, see *Enabling Individual Sterilization Bar Code Printing* on page 48 or *Enabling Batch Sterilization Bar Code Printing* on page 49, depending on how you want axiUm to print sterilization bar codes.
To select a bar code font:

1. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and seeDispensary Setup Window on page 21.

2. Go to the Dispensary Printouts section.
3. In the Bar Code Font field, select the font you want axiUm to use.
4. Click OK.

axiUm saves the changes and closes the Dispensary Setup window.

When axiUm prints the sterilization bar codes, it will use this font.

7 Setting up for Dispensary Requests

This section covers the following topics:

- Setting up automatic dispensary requests
- Setting up printouts for manual dispensary requests
7.1 Setting up Automatic Dispensary Requests

Providers can manually submit a dispensary request the day before an appointment, or they can have axiUm automatically submit the request at the time a scheduling staff books the appointment.

Manual requests do not require any setup. For instructions on submitting manual dispensary requests, refer to the axiUm User Guide for Rolodex & Patient Card and see Submitting a Dispensary Request on page 221.

In an automatic request, dispensary items are associated to procedure codes, and when you book an appointment containing this procedure code, axiUm submits a request for the associated dispensary items.

Typically, you would limit the use of the automatic dispensary request to only faculty and graduate students. This way, undergraduate students must manually submit their dispensary requests to show they understand what items are required to perform a procedure.

To set up an automatic dispensary request:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Procedure Requirements icon.

axiUm displays the Procedure Requirements List window. For information on the Procedure Requirements List window, refer to the axiUm Reference Manual for Maintenance and see Procedure Requirements List Window on page 115.

3. Click on (Create a new Record).
axiUm displays the Procedure Requirements window. For information on the Procedure Requirements window, refer to the axiUm Reference Manual for Maintenance and see *Procedure Requirements Window* on page 117.

4. Enter the fields and options. For our example, we will enter the following:

   - **Procedure From:** D2710
   - **Procedure To:** D2792
   - **Item Type:** Kit
   - **Item:** CRBR, Crown & Bridge
   - **Prov. Type:** All

5. Click **Add**.

   axiUm saves the entries and displays the new record in the Procedure Requirements List window’s list view.

6. Click **OK**.

   axiUm closes the Procedure Requirements window and returns to the Procedure Requirements List window.
axiUm adds the new record and display it in the list view.

You have now successfully associated a dispensary item to a range of procedure codes so axiUm can automatically submit dispensary requests on behalf of the provider when an appointment for this procedure code is booked.

### 7.2 Setting up Printouts for Manual Dispensary Requests

When providers submit manual dispensary requests, they can print a receipt, which they can bring to the dispensary location on the day of their appointment.

The dispensary staff can scan the bar code displayed on their receipt to bring up their request on the screen. For instructions on submitting manual dispensary requests, refer to the axiUm User Guide for Rolodex & Patient Card and see *Submitting a Dispensary Request* on page 221.

This section explains how to set up axiUm for generating manual dispensary request printouts.

▼ **To set up a printer for printing manual dispensary receipts:**

1. Go to the **Dispensary** module.
2. Click **Setup**.
axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

3. Go to the Dispensary Printouts section.

4. Go to the Regular Font field and click \( \ldots \) (ellipsis).

   axiUm displays the Font window to select from.

5. Select your font and font styles for the text displayed on your manual dispensary receipt.

6. Click OK.

7. Go to the Bar Code Font field and click \( \ldots \) (ellipsis).

   axiUm displays the Font window to select from.

8. Select your font and font styles for the bar code displayed on your manual dispensary receipt.

9. Click OK.

   axiUm saves the changes, closes the Font window, and returns to the Dispensary Setup window.

10. In the Bar Code Start Character field, enter the character to display at the beginning of the bar code when printing a manual dispensary receipt.

11. In the Stop Character field, enter the character to display at the end of the bar code when printing a manual dispensary receipt.
12. Click OK.

axiUm saves the changes.

13. Click (Close).

axiUm closes the Dispensary Setup window and returns to the Dispensary window.

You have now successfully configured the print display of dispensary request receipts. When a provider submits a manual dispensary request, and they select to print a receipt for this request, the configurations you entered here are displayed on their Dispensary Request receipt.

8 Setting up the Bar Code Scanner

This section covers the following topics:

- Defining wait time between scanning
- Setting scan beeps

8.1 Defining Wait Time Between Scanning

There is a wait time between scanning the bar code of an item and axiUm processing the bar code in the system. This wait time can be changed. For example, experienced dispensary staff working in a busy dispensary location may want to shorten this time so they can scan items faster.

To define time between scanning:

1. Go to Maintenance module’s System tab.
2. Double-click the Station Options icon.
axiUm displays the Station Options window. For information on the Station Options window, refer to the axiUm Reference Manual for Maintenance and see *Station Options Window* on page 870.

3. Go to the **General** section, the **Dialog** section, and then the **Scan Delay** item.

4. In the **Default** field, enter the number of seconds between scanning the bar code and axiUm processing it. For our example, we will enter **1**.
5. Click 

(axiUm saves the changes.

6. Click 

(axiUm closes the Station Options window and returns to the Maintenance window.

You have now successfully defined the wait time between scanning bar codes.

8.2 Defining Scan Beeps

You can set up axiUm to emit a sound when you scan a bar code, or you can mute this.

For this example, we will choose to have axiUm emit a sound.

▼To set up scan beeps:

1. Go to the Dispensary module.

2. Click Setup.

axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

3. Go to the Workstation Options section.
4. Select the **Beep on scan** option.

This enables axiUm to emit a sound when a bar code is scanned.

5. Click **OK**.

axiUm saves the changes.

6. Click **(Close)**.

axiUm closes the Dispensary Setup window and returns to the Dispensary window.

You have now successfully set up axiUm to emit a sound when a bar code is scanned.

9 Setting up Printers for Dispensary Printouts

You can set up the default printer for general printouts. For example, printing dispensary billing receipts, dispensary billing statements, issue receipts, and return receipts. If you do not set up a default printer, you can still process print jobs, but you must manually select your printer each time you select to print.

▼To set up a printer for general dispensary printouts:

1. Go to the **Dispensary** module.
2. Click **Setup**.
axiUm displays the Dispensary Setup window. For information on the Dispensary Setup window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Setup Window on page 21.

3. Go to the Dispensary Printouts section.
4. Go to the Default Printer and click (ellipsis).

axiUm displays the Select Printer window to select from.

5. From the list box, highlight a printer name.
6. Click OK.

axiUm saves the changes.

7. Click (Close).

axiUm closes the Dispensary Setup window and returns to the Dispensary window.

You have now successfully set up your workstation printer for printing general dispensary printouts.

10 Defining Out-of-Service Reasons

You can apply an out-of-service reason to a kit or an instrument when you remove it from active use. An item may become inactive if they require maintenance (e.g. sharpening), or if the item is broken or lost by the provider.
If the out-of-service reason is for a lost or broken item, you can associate this out-of-service reason to a billing code. When do you so, the last checked-out person will be billed the replacement cost of any lost or broken items. The replacement cost for an instrument is defined in the Instrument Codes window. For information on the Instrument Codes window, refer to the axiUm Reference Manual for Maintenance and see Instrument Codes Window on page 102.

If a provider loses an entire kit, the replacement cost of the kit will be added to their balance. The replacement cost of a kit is defined in the Kit Type Codes window. For information on the Kit Type Codes window, refer to the axiUm Reference Manual for Maintenance and see Kit Type Codes Window on page 103.

For this example, we will create an out-of-service reason called Returned for Repair, and the use of this code will not bill the provider.

▼ To define an out-of-service reason:

1. Go to Maintenance module’s Dispensary tab.
2. Double-click the Out of Service Reasons icon.

axiUm displays the Out of Service Reasons window. For information on the Out of Service Reasons window, refer to the axiUm Reference Manual for Maintenance and see Out of Service Reasons Window on page 114.

3. Enter the fields and options. For our example, we will enter the following:
   - Code: REP
   - Description: Returned for Repair
   - Billable to Provider: deselected

   If this out-of-service code is to affect the provider’s account balance, you must set up a billing code and enter this in the Bill Code field or Refund Code field. For instructions on setting up billing codes, see Setting up Billing Codes on page 63.
4. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

5. Click (Close).

axiUm closes the Out of Service Reasons window and returns to the Maintenance window.

You have now successfully set up an out-of-service reason.

If a provider returns a kit, and you indicate that one of the instrument needs repair (by selecting this code), the item will be indicated as out-of-service and the student will not be charged any replacement costs.

For instructions on billing and refunding a provider’s account balances, see Managing Provider Billings on page 119.

11 Setting up Billing Codes

Billing codes are credit and debit codes used in conjunction with out-of-service reasons, so that axiUm can automatically charge the provider for lost or broken items or refund them for items returned. For instructions on setting up out-of-service reasons, see Defining Out-of-Service Reasons on page 61.

Billing codes can also be used to manually charge or refund a provider’s account balance for miscellaneous items such as start-of-year deposits and year-end refunds.

For this example, we will create a debit code called Unreturned Item for lost items, and the use of this code will bill the provider.
To define a billing code:

1. Go to Maintenance module’s Dispensary tab.
2. Double-click the Billing Codes icon.

axiUm displays the Billing Codes window. For information on the Billing Codes window, refer to the axiUm Reference Manual for Maintenance and see Billing Codes Window on page 89.

3. Enter the fields and options. For our example, we will enter the following:
   - Code: LOST
   - Type: Debit (+)
   - Description: Unreturned Item
   - Print on Receipt: selected

4. Click (Add a new Record).

axiUm saves the new record and displays it in the list view.

5. Click (Close).

axiUm closes the Out of Service Reasons window and returns to the Maintenance window.
You have now successfully set up a billing code. Selecting this billing code on a provider’s account balance will add to their amount owing. If you associate this billing code to an out-of-service reason, and you indicate this out-of-service reason on a returned kit, axiUm charges the replacement cost of the kit to the provider who last checked out the kit.

For instructions on billing and refunding a providers’ account balances, see *Managing Provider Billings* on page 119.

### 12 Setting up Station Options for Dispensary

This is your workstation setup. The options defined here must match the specific functions at your dispensary location. For more information, refer to the axiUm Reference Manual for Maintenance and see *Station Options Window* on page 883.
This chapter covers the tasks you can accomplish using the Dispensary module.

This chapter covers the following topics:

- Searching dispensary items and activities
- Submitting dispensary requests
- Searching dispensary records
- Deleting dispensary records
- Checking items out
- Checking items in
- Managing lost and found items
- Transferring items to other locations
- Managing sterilization
- Managing provider billings
- Printing receipts
- Printing lists
- Processing inventory counts

At the end of this chapter you will be familiar with these tasks.

1 Searching Dispensary Items & Activities

You can further define your search by selecting details from the fields and options provided.
2 Submitting Dispensary Requests

For instructions on submitting dispensary requests, refer to the axiUm User Guide for Rolodex & Patient Card and see *Submitting a Dispensary Request* on page 221.

3 Searching Dispensary Records

You can search for any type of dispensary record, identified by the tab names. For example, the Requests tab lets you search for dispensary requests.

Use the Dispensary window to search for:

- dispensary requests
- dispensary items scanned out
- disposable items scanned out
- kits available at a location
- kit inventory levels at a location
- activity history of dispensary items
- instruments in axiUm
- lost items
- provider account balances

You can further define your search by selecting details from the fields and options provided.

This section explains how to search for various dispensary activities.

3.1 Searching for Dispensary Requests

When dispensary requests are submitted, either manually by provider or automatically by axiUm, they are displayed here.

In the following example, we will search for dispensary requests submitted today.
To search for dispensary request records:

1. Select **Requests** tab.

2. Enter the fields and options. For our example, we will enter:
   - **Provider:** Caan, David
   - **Item Type:** KITS
   - **Location:** DISP2, 2nd Floor Dispensary

3. Click **Search**.

axiUm displays all items that match the search criteria.

You have now successfully found dispensary request records in axiUm.

You can use this list to gather dispensary items to scan out for this date.

### 3.2 Searching for Dispensary Items Scanned Out

When a dispensary item is scanned out, they are displayed here.
In the following example, we will search for all dispensary items checked out today.

▼To search for a dispensary item that is scanned out:

1. Select **Dispensary Out** tab.

2. Enter the fields and options. For our example, we will use the default and change nothing.

3. Click **Search**.

   axiUm displays all items that match the search criteria.

   ![Dispensary Out Tab](image)

   You have now successfully found checked out dispensary items in axiUm.

   At the end of the clinic session, or the end of the day, dispensary staff can use this list to identify dispensary items that have not been returned.

3.3 Searching for Disposable Items Scanned Out

When a sundry item is scanned out, they are displayed here.

In the following example, we will search for all large-sized masks scanned out today.

![Dispense Out Tab](image)
▼To search for a sundry item that is scanned out:

1. Select **Disposables** tab.

2. Enter the fields and options. For our example, we will enter:
   - Item Type: 4003, Large Mask
   - Location: ALL

3. Click **Search**.

axiUm displays all items that match the search criteria.

You have now successfully found checked out sundry items in axiUm.

Dispensary staff can use this list to identify frequently used items at each location, and stock disposables according to its usage rate.

### 3.4 Searching for Kits Available at a Location

All kits that are physically present at a location are displayed here. These may be kits at a dispensary location that are available for scanning out, or dirty kits collecting in a return cart for transfer to the sterilization room. Currently checked out items are unavailable and therefore not listed here.
In the following example, we will search for all Post Grad Crown and Bridge Cassettes located in the 2nd Floor Dispensary.

**To search for a kit type in a location:**

1. Select **Kits In** tab.

2. Enter the fields and options. For our example, we will use the default and change nothing.

3. Click **Search**.

axiUm displays all items that match the search criteria.

You have now successfully found available kits, by type and location.

A dispensary staff can use this list to see what items are currently available for checking out.

### 3.5 Searching for Kit Inventory Levels at a Location

The inventory levels of all kit types, at a specified location, whether available or currently checked out, are displayed here.

In the following example, we will search for all unfilled kit types in the 2nd Floor Dispensary.
To search for inventory levels in a location:

1. Select Kits Levels tab.

2. Enter the fields and options. For our example, we will enter the following:
   - Location: DISP2, 2nd Floor Dispensary
   - Display kit levels for: All Unfilled

3. Click Search.

axiUm displays all items that match the search criteria.

You have now successfully displayed unfilled kit inventory levels, location. You can use this list to identify kit types that do not fulfill the minimum required to have stocked at this dispensary location.

A dispensary staff can use this list to find dispensary locations with excess kits that can be transferred to another location with a shortage of those kits.

3.6 Searching for Activity History of Dispensary Items

The history of all dispensary items (both kits and sundry items) are displayed here.
In the following example, we will search for all dispensary activity that occurred today in the 2nd Floor Dispensary, between a specific time range.

To search for dispensary history in a location:

1. Select **Dispensary History** tab.

2. Enter the fields and options. For our example, we will enter the following:
   - Time From: 9:00 AM
   - Time To: 2:00 PM
   - Disp. Out: DISP 2, 2nd Floor Dispensary
   - Disp. In: ALL

3. Click **Search**.

axiUm displays all items that match the search criteria.

You have now successfully displayed the dispensary history of a location. You can use this list to identify kit types that do not fulfill the minimum required to have stocked at this dispensary location.

A dispensary staff can use this list to find dispensary locations with excess kits that can be transferred to another location with a shortage of those kits.
3.7 Searching for Instruments in axiU姆

All dispensary types (both kits and sundry items) recorded in axiUм are displayed here.

In the following example, we will search for all PGCB (Post Grad Crown and Bridge Cassette) activity in the 2nd Floor Dispensary, that occurred today during the morning only.

▼To search for dispensary types in axiUм:

1. Select Instruments tab.

2. Enter the fields and options. For our example, in the Item Type drop-down field, we will select PGCB, Post Grad Crown & Bridge Cass.

3. Click Search.

axiUм displays all items that match the search criteria.

You have now successfully displayed all kits of kit type PGCB, Post Grad Crown and Bridge Cassette. You can use this list to identify the number of times used and the dispensary location where the kit's last activity occurred.
3.8 Searching for Lost Items

All dispensary types (both kits and sundry items) that are indicated in axiUm as lost are displayed here. If a student returns a kit to the dispensary location but an instrument is missing from the case, you can mark this in axiUm as lost. axiUm will then add the lost item to the list view in the Lost Items tab.

In the following example, we will search for all items that were lost in the past year.

To search for lost items in axiUm:

1. Select Lost Items tab.

2. Enter the fields and options. For our example, we will enter the following:
   - Item Type: ALL
   - Date From: 02/06/2009
   - Date To: 02/06/2010
   - Location: ALL

3. Click Search.

axiUm displays all items that match the search criteria.
You have now successfully displayed all items that were lost in the past year. You can use this list to identify kits that need to be purchased for replacement, and also to track providers who frequently lose items.

### 3.9 Searching for Provider Account Balances

All dispensary items (both kits and sundry items) that are indicated in axiUm as lost or found, and resulted in a charge or refund to the provider, are displayed here. If a student lost an instrument from a kit case and you charged the student a replacement cost, or if they later returned the instrument and you gave them a refund, axiUm will calculate this into the provider’s balance and display that balance in this list view.

In the following example, we will search for the account balance for the provider Terry Gates

▼To search for a provider’s account balance:

1. Select Provider Bal tab.

2. In the Provider field, enter the provider whose balance you want to see. For our example, we will enter Terry Gates.

3. Click Search.

axiUm displays all items that match the search criteria.
You have now successfully displayed the provider Terry Gates’ current dispensary balance. You can use this to remind providers of payments owing.

## 4 Deleting Dispensary Records

You can only delete dispensary requests. All other records remain in axiUm until resolved. For example, if a provider requested a kit but did not check it out on the date they requested it, you can delete the request to free the kit for someone else to check out.

For this example, we will search for all dispensary requests that were not scanned out yesterday and delete the request.

**▼ To delete a dispensary request:**

1. Select **Requests** tab.

2. Enter the fields and options. For our example, we will enter the following:
   
   - **Item Type:** ALL
   - **Location:** ALL

3. Click **Search**.

axiUm displays all items that match the search criteria. In our example, there is only one dispensary request that remains in the Requests tab.
4. Highlight the item from the list view.
5. Click **Delete**.

axiUm deletes the item from the list view.

You have now successfully displayed all dispensary requests that the providers have not checked out, and deleted them.

## 5 Checking Items Out

When a provider arrives at the dispensary location, you can physically pick up their requested items from the shelves and scan these items to check out.

There are different methods to checking an item out:

- list view
- Check Out button

This section covers the different methods.

**To check items out using the right-click option:**

1. Search for dispensary requests.

   For instructions on searching for requests, see *Searching for Dispensary Requests* on page 68.

2. From the list view, highlight an item.
3. Right-click to display a list of options.

4. Select the **Check Out** option.

   axiUm displays the Check Out window. For information on the Check Out window, refer to the axiUm Reference Manual for Dispensary and see *Check Out Window* on page 5.

5. In the **Dispensary Item** field, scan the bar code from the item.

   Alternatively, you can manually enter the bar code in this field.
6. Click **Check-Out**.

---

*Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see *Defining Wait Time Between Scanning* on page 57.*

---

axiUm checks out the item and displays it in the list view.

You have now successfully checked an item out using the right-click method.

At this time, you can print an issue receipt. For instructions on printing an issue receipt, see *Printing Receipts for Items Issued* on page 122.

If you try scanning out a kit that uses a unique bar code and this kit was not part of the last dispensary count, axiuUm displays the message, “Kit was not counted during last count process. Please see an administrator.”
To check items out using the Check Out button:

1. Click **Check Out**.

   axiUm displays the Check Out window. For information on the Check Out window, refer to the axiUm Reference Manual for Dispensary and see *Check Out Window* on page 5.

2. In the **User Login** field, enter the provider login.

   Alternatively, the provider can swipe their card and axiUm will display their provider information in this field.

3. In the **Dispensary Item** field, scan the bar code from the item.
Alternatively, you can manually enter the bar code in this field.

4. Click **Check-Out**.

   Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm checks out the item and displays it in the list view.

You have now successfully checked an item out using the Check Out button.

6  **Checking Items In**

When the providers return their checked-out items, you must check these back in.

This section covers the following topics:

- Checking in used items
- Checking in unused items
6.1 Checking in Used Items

Typically, providers return kits that have been used, evident by the lack of a sterilization wrapper. The sterilization wrapper is discarded at the time the kit was opened. Once the sterilization wrapper is removed from the kit, the kit is no longer sterile.

There are different methods to checking an item out:

- list view
- Check In button

This section covers the different methods.

To check in used items using the list view:

1. Search for dispensary items that are currently checked out.

   For instructions on searching for dispensary items that are currently checked out, see Searching for Dispensary Items Scanned Out on page 69.

2. From the list view, highlight an item

3. Right-click to display a list of options.

   ![List View of Dispensary Items]

4. Select the Check In option.

   axiUm displays the Check In window. For information on the Check In window, refer to the axiUm Reference Manual for Dispensary and see Check In Window on page 1.
The outer bar code of the highlighted item is displayed in the Dispensary Item field.

5. Click **Check-In**.

   Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm checks in the item and deletes it from the list view.

You have now successfully checked in a returned item using the list view method.
To check in used items using the Check In button:

1. Click Check In.

axiUm displays the Check In window. For information on the Check In window, refer to the axiUm Reference Manual for Dispensary and see Check In Window on page 1.

2. In the User Login field, enter the provider login.

Alternatively, the provider can swipe their card and axiUm will display their provider information in this field.

3. In the Dispensary Item field, scan the bar code from the item.
Alternatively, manually enter the bar code in this field.

4. **Click Check-In.**

   Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm checks in the item and deletes it from the list view.

You have now successfully checked in a used item using the Check In button.

### 6.2 Checking in Unused Items

Sometimes providers return unused kits, evident by the presence of a sterilization wrapper. This often occurs when a provider checks out kits for their appointment but the patient never arrived, and therefore the kit was unused. Because the sterilization wrapper is still present on the kit, the kit is still sterile.

There are different methods to checking an item in:

- list view
- Check In button
This section covers the different methods.

▼To check in unused items using the list view:

1. Search for dispensary items that are currently checked out.

   For instructions on searching for dispensary items that are currently checked out, see Searching for Dispensary Items Scanned Out on page 69.

2. From the list view, highlight an item.

3. Right-click to display a list of options.

4. Select the **Check In** option.

   axiUm displays the Check In window. For information on the Check In window, refer to the axiUm Reference Manual for Dispensary and see Check In Window on page 1.

   The outer bar code of the highlighted item is displayed in the Dispensary Item field.
5. Select the **Is Sterile** checkbox.

![Check In Window](image)

6. Click **Check-In**.

   *Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.*

axiUm checks in the item and deletes it from the list view.

![Check In Window](image)

You have now successfully checked an unused item in using the list view method.

The Is Sterile checkbox remains selected so that you can check in additional unused items that this provider returns.
To check in unused items using the Check In button:

1. Click **Check In**.

axiUm displays the Check In window. For information on the Check In window, refer to the axiUm Reference Manual for Dispensary and see *Check In Window* on page 1.

2. In the **User Login** field, enter the provider login.

Alternatively, the provider can swipe their card and axiUm will display their provider information in this field.

3. In the **Dispensary Item** field, scan the bar code from the item.
Alternatively, manually enter the bar code in this field.

4. Select the **Is Sterile** checkbox.

5. Click **Check-In**.

> Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm checks in the item and deletes it from the list view.

You have now successfully checked an unused item in using the Check In button.
The Is Sterile checkbox remains selected so that you can check in additional unused items that this provider returns.

7 Managing Lost & Found Items

This section covers the following topics:

- Indicating lost kits
- Indicating found items
- Replacing instruments and indicating reasons

7.1 Indicating Lost Kits

When providers check out kits and do not return the kits for some time, you must indicate these in axiUm as lost kits.

If the kit was returned but some of the instruments are missing or broken, you must indicate the individual items in axiUm during the replacement process. For information on replacing instruments, see Replacing Instruments & Indicating Reasons on page 95.

axiUm automatically charges the replacement cost of the lost kits to the account of the provider who last checked out the kit containing this instrument. To do this, you must set up your billing code to bill the provider. For instructions on setting up billing codes, see Setting up Billing Codes on page 63.

For this example, we will indicate that a kit is lost.

▼To indicate lost kits:

1. Search for dispensary items that are currently checked out.
   
   For instructions on searching for dispensary items that are currently checked out, see Searching for Dispensary Items Scanned Out on page 69.

2. From the list view, highlight an item.

3. Click Lost.
axiUm displays the Kit/Sundry Not Returned window. For information on the Kit/Sundry Not Returned window, refer to the axiUm Reference Manual for Dispensary and see Kit / Sundry Not Returned Window on page 32.

4. From the Reason field, select a reason. For our example, we will select KITMIS, Kit Missing.

axiUm displays the replacement cost in the Total field.

5. Click OK.

axiUm saves your entries, closes the Kit/Sundry Not Returned window, and returns to the Dispensary window. axiUm deletes the item from the Dispensary Out tab’s list view.

You have now successfully indicated that a kit was lost.

In the Lost Items tab, if you search for items that this provider lost, axiUm displays it in the list view. For instructions on searching for lost items, see Searching for Lost Items on page 76.

In the Provider Bal tab, if you search for this provider’s account, axiUm displays the replacement cost has been charged to this student’s account balance. For instructions on searching for provider account balances, see Searching for Provider Account Balances on page 77.
7.2 Indicating Found Items

When providers return lost items (entire kits or individual instruments), you must indicate these in axiUm as found items.

axiUm automatically reimburses the replacement cost of the returned items to the account of the provider who was charged for it. To do this, you must set up your billing code to reimburse the provider. For instructions on setting up billing codes, see Setting up Billing Codes on page 63.

For this example, we will indicate that a kit was found.

To indicate a found instrument:

1. Search for dispensary items that are currently lost.

   For instructions on searching for dispensary items that are currently lost, see Searching for Lost Items on page 76.

2. From the list view, highlight an item.

3. Click Found.

   axiUm displays the Kit / Sundry Found window. For information on the Kit / Sundry Found window, refer to the axiUm Reference Manual for Dispensary and see Kit / Sundry Found Window on page 31.

The Refund field defaults to the replacement cost of the item. For instructions on setting up replacement costs, see Defining Instrument Types in axiUm on page 8.

4. Click OK.
axiUm displays the Check In Lost Kit Question window.

5. Click Yes.

axiUm checks in this kit, saves your entries, closes the Kit / Sundry Found window, and returns to the Dispensary window.

The Lost Items tab no longer displays it in the list view.

You have now successfully indicated that an instrument was returned.

In the Provider Bal tab, if you search for this provider’s account, axiUm no longer displays the replacement cost that was charged to this student’s account balance. For instructions on searching for provider account balances, see Searching for Provider Account Balances on page 77.

7.3 Replacing Instruments & Indicating Reasons

This section covers the following topics:

- Replacing lost and broken instruments
- Replacing expired instruments

Replacing Lost & Broken Instruments

Sometimes providers may return kits with missing or broken instruments. You must physically check all returned items in the dirty location, and when you find missing or broken items, you must physically replace these items and indicate the replacement reasons in axiUm.

axiUm automatically charges the replacement cost of the lost kits to the account of the provider who last checked out the kit containing this instrument. To do this, you must set up your billing code to bill the provider. For instructions on setting up billing codes, see Setting up Billing Codes on page 63.

For this example, we will indicate that the instrument was returned broken.
To replace an instrument and indicate reasons for replacement:

1. Click Replace.

axiUm displays the Replace Kit Instrument window. For information on the Replace Kit Instrument window, refer to the axiUm Reference Manual for Dispensary and see Replace Kit Instrument Window on page 34.

2. Go to the Kit field.

3. Take an item from the dirty location and scan the bar code on the item.

axiUm displays the bar code in the field, and also displays all items associated to the kit in the list view.
4. Click **Last Used By**.

axiUm defaults the provider name to the provider who last checked out the kit. This is useful if the instrument was discovered broken after the kit was checked in (e.g. you noticed this later in the day, or was noted by a different person such as the sterilization staff), and you do not know or remember the provider who returned the item.

5. From the list view, select the checkbox next to the items. For our example, we will select the checkbox next to item 2, 5-306, Iris Scissors, Curved.

6. From the **Reasons** drop-down field, select a reason code for replacing this item. For our example, we will select **BROKEN**.

7. Click **OK**.

axiUm saves your selection, closes the Replace Kit Instrument window, and returns to the Dispensary window.

You have now successfully replaced an instrument in a kit and indicated its replacement reason.
Because the reason code is associated to a charge, axiUm charges this amount to the provider’s balance. For instructions on searching provider’s account balance, see *Searching for Provider Account Balances* on page 77.

**Replacing Expired Instruments**

Instruments within a kit will eventually reach the end of life (for instructions on setting up instrument expiry, see *Defining Lifecycle of Instrument Types* on page 9). Typically, different instruments reach the end of life before other instruments in the same kit; entire kits do not expire, only the instruments within in them expire. Also, you must replace instruments that are broken or lost.

You must set up axiUm so that it does not automatically charge the replacement cost of the expired instrument to the account of the provider who last checked out this instrument. To do this, you must set up your billing code to not bill the provider. For instructions on setting up billing codes, see *Setting up Billing Codes* on page 63.


▼ To replace an expired instrument:

1. Click **Replace**.

   axiUm displays the Replace Kit Instrument window. For information on the Replace Kit Instrument window, refer to the axiUm Reference Manual for Dispensary and see *Replace Kit Instrument Window* on page 34.

2. Go to the **Kit** field.
3. Take an item from the dirty location and scan the bar code on the item.
axiUm displays the bar code in the field, and also displays all items associated to the kit in the list view.

4. Click Last Used By.

axiUm defaults the provider name to the provider who last checked out the kit. This is useful if the instrument was discovered broken after the kit was checked in (e.g. you noticed this later in the day, or was noted by a different person such as the sterilization staff), and you do not know or remember the provider who returned the item, and you need to know whose account balance to apply any charges to.

5. From the list view, select the checkbox next to the items. For our example, we will select the checkbox next to item 5, 76-1, Articulating Paper Forceps.
6. From the **Reasons** drop-down field, select a reason code for replacing this item. For our example, we will select **W&T**.

![Image of Replace Kit Instrument window]

**If the kit contains a mix of missing and damaged items, you must group the instruments and process them one reason at a time. To do this, select all items of the same reason, select the reason, and click the Save button; then select all items of another reason, select the reason, and click the Save button again.**

7. Click **OK**.

axiUm saves your selection, closes the Replace Kit Instrument window, and returns to the Dispensary window.

You have now successfully replaced an expired instrument in a kit and indicated its replacement reason.

In the Lost Items tab, the provider is not billed for the replacement cost of these items because we selected a reason code that is not associated to any charge.
8 Transferring Items to Other Locations

You may be required to use a transfer cart to:

- Transfer items during the dispensary process, where the various dispensary locations are physically separated from each other. For example, you must transfer returned items from the dirty location to the sterilization room.
- Transfer inventory from a location with a surplus of items to a location with a shortfall of these items.

There are two scenarios of transfers:

- Transferring from one location to another without using a transfer cart (e.g. we are transferring from dirty location to dispensary room, and they are physically in the same location)
- Transferring from one location to another using a transfer cart (e.g. we are transferring from dirty location to dispensary room, and they are physically in a separate location)

8.1 Transferring Items Directly (No Transfer Carts)

Sometimes, providers return their used kits directly to the sterilization room so that transfer carts are not required for transporting dirty items from the dispensary location to the sterilization location.

For this example, a dispensary staff will scan in the items as providers drop them off at the sterilization location, and the dirty items will be placed in a dirty bin (the dirty dispensary location). When the bin is full, they are ready to be cleaned and sterilized.

▼To transfer items directly:

1. Check in all returned items and physically place them in the dirty bin.
   
   For instructions on checking in items, see Checking Items In on page 83.
   
   For instructions on setting up dirty locations, see Setting up Dirty Locations on page 25.

2. Search for all dirty items in the dirty location.
   
   For instructions on searching items in a location, see Searching for Kits Available at a Location on page 71.
For our example, we will search for all dirty items in the Dirty location. The item you checked in is listed here.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
<th>Bar Code</th>
<th>Unit Code</th>
<th>Location</th>
<th>Last Dep</th>
<th>Trace Used</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>FC02</td>
<td>Face Grit Crown &amp; Br...</td>
<td>01:FC020025</td>
<td>DIRTY</td>
<td>DIRTY</td>
<td>10</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These returned items are now waiting for cleaning and sterilization. When the bin is full, they are ready to be transferred to the sterilization location where they will be cleaned and sterilized.

3. **Click Transfer.**

axiUm displays the Transfer Kits window. For information on the Transfer Kits window, refer to the axiUm Reference Manual for Dispensary and see *Transfer Kits Window* on page 40.

### Transfer Kits Window

4. Select the **Individual Kit(s)** option.
5. In the **Kit** field, scan the bar code on the item.

   axiUm displays the bar code number in the field.

6. **Click Transfer.**
axiUm confirms the transfer, transfers the items’ records from the dirty location (DIRTY1, Dirty 1) to the sterilization location (CSF, Central Sterilization).

You have now successfully transferred items from one location to another using the direct transfer method.

When you search for kits in the dirty location, this item is deleted from the Kits In tab’s list view. If you search for kits in the sterilization location, it will display there. For instructions on searching kits in a location, see *Searching for Kits Available at a Location* on page 71.

### 8.2 Transferring Items Using Transfer Carts

You may need a transfer cart to:

- Move kits from the drop-off (dirty) location to the sterilization location.
- Move kits from the sterilization location back to the dispensary location.
- Transferring kits from one location with a surplus to another location with a shortfall.

You must have a transfer cart set up as one of your locations. For instructions on setting up a transfer cart, see *Setting up Transfer Carts* on page 30.

For this example, we will transfer sterilized kits from one dispensary location to another.
To transfer items using a cart:

1. Search for items at a location. For our example, we will search for items in DISP 2, 2nd Floor Dispensary.

   axiUm displays all sterilized items in this location.

2. Click Transfer.

   axiUm displays the Transfer Kits window. For information on the Transfer Kits window, refer to the axiUm Reference Manual for Dispensary and see Transfer Kits Window on page 40.

3. Select the Individual Kit(s) option.

4. In the Destination field, select the final destination of the contents. For our example, we will select the pre-sterilization holding location, DISP1, 1st Floor Dispensary.

5. In the Kit field, scan the bar codes on the items as you place them in the transfer cart. For our example, we will scan a PGCB, Post Grad Crown and Bridge Cassette.
Transferring Items to Other Locations

axiUm displays the bar code number in the field.

![Transfer Items to Other Locations](image)

6. Click **Transfer**.

axiUm confirms the transfer.

![Transfer确认](image)

axiUm transfers the items from the dirty location to the transfer cart. The scanned items from the original dispensary location is now associated to the transfer cart. When you run a search in the Kits In tab for the 2nd Floor Dispensary, this item is deleted from the list view.

![Transfer Items To Other Locations Table](image)

Now you must physically transfer the cart to the dispensary location, and unload the cart. The dispensary staff will follow the next procedures.

7. Search for kits in **CART01, Cart 1**.

For instructions on searching for kits in a location, see *Searching for Kits Available at a Location* on page 71.
axiUm displays all dirty items in the cart.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
<th>Bar Code</th>
<th>Data Code</th>
<th>Location</th>
<th>Last Disp</th>
<th>Time Used</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>PG724</td>
<td>424577482</td>
<td>603076</td>
<td>000000</td>
<td>CART01</td>
<td>000000</td>
<td>000000</td>
<td>0</td>
</tr>
</tbody>
</table>

8. Click **Transfer**.

axiUm display the Transfer Kits window.

9. Select the **All Kits from Location** option. If you have multiple items in the cart, this will transfer all items in a single scan.

10. In the **Transfer to** field, select a location. In our example, this will be 1st Floor Dispensary.

11. In the **Location** field scan the bar code on the transfer cart.

Because the items being transferred are associated to the transfer cart, scanning the bar code on the transfer cart is equivalent to scanning the individual items.
12. Click **Transfer**.

Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm transfers the items from cart (Cart 1) to the location (1st Floor Dispensary).

You have now successfully transferred items from one location to another using a transfer cart.

When you search for kits in Cart 1, this item is deleted from the Kits In tab’s list view. If you search for kits in the 1st Floor Dispensary, it will display there. For instructions on searching kits in a location, see *Searching for Kits Available at a Location* on page 71.

### 9 Managing Sterilization

This section covers the following topics:

- Sterilizing items
- Printing sterilization bar code labels
- Viewing sterilization history of items
- Verifying sterilization
9.1 Sterilizing Items

When you receive used items at the sterilization room, you must clean and sterilize the items, and indicate in axiUm that they are ready to be used again.

Before you begin sterilizing items, make sure that the dirty items have been transferred to your sterilization location. For instructions on transferring items, see Transferring Items to Other Locations on page 101.

The kits must first go into the washer. In the meantime, print the sterilization bar codes (for instructions see Printing Sterilization Bar Code Labels on page 114). When the kits come out of the washer, they are prepped for sterilization by wrapping them and giving them a sterilization bar code that you printed. You must then place the kits in the autoclave for sterilization.

This section covers the following topics:

- Sterilizing items that use unique bar codes
- Sterilizing items that use generic bar codes

Sterilizing Items that use Unique Bar Codes

Typically the items you sterilize will be kits, and these kits have a unique bar code to differentiate one kit of a kit type from another kit of the same type.

You must set up kits to use unique bar codes. For instructions on setting up kits to use unique bar codes, see Defining Kit Types that use Unique Bar Codes on page 15.

You must first set up your workstation for printing outer bar codes. For instructions see Setting up Printers for Sterilization Labels on page 45.

Before you start sterilizing, make sure that the items at your location have been washed. Once the items are washed, they are ready to be sterilized.

▼ To sterilize items that use unique bar codes:

1. Search for items at your sterilization location. For our example, we will search for items at CSF, Central Sterilization.

   For instructions on searching for items at a location, see Searching for Kits Available at a Location on page 71.
axiUm displays all the washed items at the sterilization location that are ready to be sterilized.

2. Click Sterilize.

axiUm displays the Sterilize Kits window. For information on the Sterilize Kits window, refer to the axiUm Reference Manual for Dispensary and see Sterilize Kits Window on page 37.

3. In the Kit field, scan the kit bar code.
4. **Press ENTER.**

Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.

axiUm displays the Replace Kit Instrument window. If you find missing or broken instruments, you must indicate them here. For instructions on indicating lost or broken instruments, see *Indicating Lost Kits* on page 92.
For our example, there is nothing missing or broken, so we will click the (Close) button. axiUm closes the Replace Kit Instrument window and returns to the Sterilize Kits window. The Outer Code field is now enabled.

Place a sterilization bar code on the kit, if you have not already done so when the kit came out of the washer. This bar code can be printed by axiUm or by another application. For instructions on using axiUm to print sterilization bar codes, see Printing Sterilization Bar Code Labels on page 114.

5. In the Outer Code field, scan the sterilization bar code on the kit.

6. Press ENTER.

💡 Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.
When axiUm clears the fields, the sterilization bar code has been scanned.

7. Place the kits in the autoclave for sterilization.

You have now successfully processed the kits for sterilization.

When you search in the Kits In tab for items in this location, the sterilized items are still in this location (if you set up your dispensary locations in Setting up Locations on page 22).

If you have defined a sterilize transfer location, the sterilized items are now in the sterilize transfer location (e.g. a transfer cart) where sterilized items accumulate until transfer. When the kits come out of the autoclave, they are ready to be transferred to the original dispensary location. For instructions on setting up your sterilize transfer location, see Setting up Dispensary Locations on page 22.

Sterilizing Items that use Generic Bar Codes

Occasionally, you may need to sterilize items that use a generic bar code (e.g. handpieces), and one instrument of one type is not differentiated in axiUm from another instrument of the same type. During axiUm’s sterilization process, items with generic bar codes are processed differently from those that use unique bar codes.

You must set up generic kits to use generic bar codes. For instructions on setting up kits to use generic bar codes, see Defining Kit Types that use Generic Bar Codes on page 18.

You must first set up your workstation for printing outer bar codes. For instructions on setting up your workstation for printing outer bar codes, see Setting up Printers for Sterilization Labels on page 45.

Before you start sterilizing, make sure that the items at your location have been washed. Once the items are washed, they are ready to be sterilized.
To sterilize items that use generic bar codes:

1. Search for kits in the sterilization location.
   
   axiUm displays all the dirty items that are ready to be sterilized.

2. Click Sterilize.
   
   axiUm displays the Sterilize Kits window. For information on the Sterilize Kits window, refer to the axiUm Reference Manual for Dispensary and see Sterilize Kits Window on page 37.

3. In the Kit field, enter the generic bar code for the generic kit (typically you will have a laminated list of generic items in the sterilization room for these types of kits). This is the bar code entered in the Bar Code field of the Kit Type Codes window. For our example, we will enter 11111114.

4. Press ENTER.

   Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.
axiUm displays the Sterilization Batch Kit Processing window. For information on the Sterilization Batch Kit Processing window, refer to the axiUm Reference Manual for Dispensary and see Sterilization Batch Kit Processing Window on page 36.

5. Enter the fields and options. For our example, we will enter the following:
   - Starting Outer Bar Code: 11
   - Number to Sterilize: 3

6. Click OK.

   axiUm saves your entries, closes the Sterilization Batch Kit Processing window, and returns to the Sterilize Kits window.

You have now successfully sterilized a batch of generically bar coded items.

When you go to the Kits In tab and search in the batch sterilize location, they are no longer in the list view; they are now in the list view under the sterilize transfer location (clean location), and if you look at the Outer Code column, the generic items now have a sterilization (outer) bar code, and these bar codes are the same on all generic items of the same type.

9.2 Printing Sterilization Bar Code Labels

This section covers the following topics:

- Printing sterilization bar codes individually
- Printing sterilization bar codes in batches
Before you begin, make sure that axiUm is enabled to print sterilization bar codes. For instructions on printing sterilization bar codes, see Enabling Sterilization Bar Code Usage on page 46.

You must also select a bar code font for axiUm to use to print bar codes. For instructions on selecting a bar code font, see Selecting Bar Code Font on page 51.

Printing Sterilization Bar Codes Individually

Make sure that you have axiUm set up to assign sterilization bar codes individually and automatically print them as each kit is scanned for sterilization. For instructions on enabling axiUm to assign sterilization bar codes individually, see Enabling Individual Sterilization Bar Code Printing on page 48.

When you scan an item into the sterilization location, axiUm assigns a sterilization bar code and automatically prints them individually as they are scanned in.

Printing Sterilization Bar Codes in Batches

Before you begin, make sure that you have axiUm set up to print sterilization bar codes in batches. For instructions on setting up axiUm for printing sterilization bar codes in batches, see Enabling Batch Sterilization Bar Code Printing on page 49.

▼ To print sterilization labels:

1. Click Labels.

   axiUm displays the Print Kit Labels window. For information on the Print Kit Labels window, refer to the axiUm Reference Manual for Dispensary and see Print Kit Labels Window on page 34.

2. In the Number of Labels to Print field, enter the number of bar code labels to print. For our example, we have 31 items that have been scanned into the sterilization location and ready to go into the autoclave, so we will enter 31.

3. Click OK.
axiUm prints the sterilization bar codes to your default printer. axiUm numbers the bar codes sequentially; it prints the next bar code number following the last one.

You have now successfully printed sterilization (outer) bar codes.

9.3 Viewing Sterilization History of Items

You can view the history of an item in the Dispensary Out tab and the Kits In tab.

For our example, we will access an item’s sterilization history from the Kits In tab for CSF, Central Sterilization.

▼To view sterilization history of an item:

1. In the Kits In tab, run a search for dispensary items at a location. For our example, we will search for all kits in DISP 2, 2nd Floor Dispensary.

   For instructions on searching for dispensary items at a location, see Searching for Kit Inventory Levels at a Location on page 72.

2. From the list view, highlight an item.

3. Right-click to display a list of options.

4. Select the Sterilization History option.

   axiUm displays the Sterilization History window. For information on the Sterilization History window, refer to the axiUm Reference Manual for Dispensary and see Sterilization History Window on page 37.
You have now successfully displayed the sterilization history of a dispensary item.

### 9.4 Verifying Sterilization

You may want to verify that the batch of sterilized kits coming out of the autoclave is indeed sterile. If the sterilization of a kit is questioned, you can trace that kit to the batch it was sterilized with, and identify other kits from the same batch.

The kit item code is tied to the batch number in the Info Manager module.

▼To verify a sterilization process:

1. Run the sterilization process with a kit.
2. Search for kits in the sterilization location. For our example, this will be **CSF**, Central Sterilization.

For instructions on searching for dispensary items at a location, see *Searching for Kit Inventory Levels at a Location* on page 72.

axiUm displays all the dirty items that are ready to be sterilized.

3. Click **Sterilize**.

axiUm displays the Sterilize Kits window. For information on the Sterilize Kits window, refer to the axiUm Reference Manual for Dispensary and see *Sterilize Kits Window* on page 37.
4. Enter the fields and options provided. For our example, we will enter:

- **Type**: Verification.
- **Batch#**: 001001 (this is the bar code indicated on the autoclave’s printout)
- **Outer Code**: 01PGCB0025A

5. Press **ENTER**.

   *Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.*

axiUm saves the information and clears the fields for another verification.

You have now successfully verified the sterilization for a kit.
10 Managing Provider Billings

You can bill providers for lost or damaged items to their account balances. The Provider Bal tab provides a list of providers and the total dispensary balance on their account.

This section covers the following topics:

- Billing providers
- Refunding providers

10.1 Billing Providers

Items that were marked as missing or lost have been automatically billed to the account of the provider who last checked out the item. You can also manually add charges to their account balance for items that axiUm does not automatically allocate, such as deposits.

For this example, we will manually add a deposit to the provider David Caan’s account balance.

▼To bill a provider:

1. In the Provider field, enter the provider ID of the provider whose billing information you want to view. For our example, we will enter David Caan.
2. Click Billing.

axiUm displays the Dispensary Billings window. For information on the Dispensary Billings window, refer to the axiUm Reference Manual for Dispensary and see Dispensary Billings Window on page 18.

The Dispensary Billings window’s list view displays any items in this provider’s account balance.
3. Click ® (Clear Data).

axiUm clears some of the fields and options.

4. Go to the Code field and click ¸ (ellipsis).

axiUm displays the Billing Codes window to select from. For information on the Billing Codes window, refer to the axiUm Reference Manual for Maintenance and see Billing Codes Window on page 89.

5. Enter the fields and options. For our example, we will enter the following:
   
   - Code: DEP. Deposit
   - Amount: 15.00

6. Click ❘ (Add a new Record).

axiUm saves the new record and displays it in the list view.

You have now successfully added a deposit to a provider’s account balance.

When you search in the Provider Bal tab, this provider’s account balance has been updated in their current balance.

10.2 Refunding Providers

Items that were marked as found will automatically refund the account of the provider who was charged for the missing item. You can also manually add refunds to their account balance.

For this example, we will manually add a refund to the provider David Caan’s account balance.
To refund a provider:

1. In the **Provider** field, enter the provider ID of the provider whose billing information you want to view. For our example, we will enter David Caan.

2. Click **Billing**.

   axiUm displays the Dispensary Billings window. For information on the Dispensary Billings window, refer to the axiUm Reference Manual for Dispensary and see **Dispensary Billings Window** on page 18.

3. Click (Clear Data).

   axiUm clears some of the fields and options.

4. Enter the fields and options. For our example, we will enter the following:
   - **Code**: REF, Refund
   - **Amount**: 15.00

5. Click (Add a new Record).
axiUm saves the new record and displays it in the list view.

You have now successfully added a refund to a provider’s account balance.

When you search in the Provider Bal tab, this provider’s account balance has been updated in their current balance.

11 Printing Receipts

This section covers the following topics:

- Printing receipts for items issued
- Printing receipts for items returned
- Printing Receipts for items transferred
- Printing billing receipts and statements

11.1 Printing Receipts for Items Issued

When dispensary staff checks out items for providers, they may be required to print dispensary receipts as hardcopy proof that items have been checked out.

You can print issue receipts from one of the following areas:

- Check Out window
- Dispensary window’s tabs

This sections describes the different methods.
Printing Issue Receipts From the Check Out Window

To print an issue receipt from the Check Out window:

1. Check out an item.
   
   For instructions on checking out an item, see Checking Items Out on page 79.

2. Click **Print**.
   
   axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.
   
   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click **Select**.
   
   axiUm prints the receipt to the selected printer.

You have now successfully printed an issue receipt from the Check Out window.

If you did not select to print some of the issue receipts while in the Check Out window, axiUm notifies you when closing this window. Clicking (Close) displays the following message.

Click Yes to print to the default printer.
Printing Issue Receipts From the Dispensary Window's Tabs

You can print issue receipts from the following tabs:

- Dispensary Out
- Dispensary History

For this example, we will print an issue receipt from the Dispensary Out tab.

▼To print an issue receipt from the Dispensary Out tab:

1. Check out an item.
   
   For instructions on checking out an item, see *Checking Items Out* on page 79.

2. Search for dispensary items that are currently checked out.

   For instructions on searching for dispensary items that are currently checked out, see *Searching for Dispensary Items Scanned Out* on page 69.

3. From the list view, highlight an item.

4. Right-click to display a list of options.

5. Select the **Print Receipt** option.
axiUm displays the Select Printer window.

6. Highlight an item. This is the printer you want to print to.

💡 You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

7. Click Select.

axiUm prints the receipt to the selected printer.

You have now successfully printed an issue receipt from the Dispensary window’s Dispensary Out tab.

### 11.2 Printing Receipts for Items Returned

When dispensary staff checks in items for providers, they may be required to print dispensary receipts as hardcopy proof that items have been returned.

You can print issue receipts from one of the following areas:

- Check In window
- Dispensary window’s tabs

This sections describes the different methods.

**Printing Return Receipts From the Check In Window**

▼To print a return receipt from the Check In window:

1. Check in an item.

For instructions on checking in an item, see *Checking Items In* on page 83.
2. Click **Print**.

   axiUm displays the Select Printer window.

   ![Select Printer Window](image)

3. Highlight an item. This is the printer you want to print to.

   You can print to file by selecting the Print to File checkbox. When you click **OK**, axiUm prompts you to browse to a directory to save the file.

4. Click **Select**.

   axiUm prints the receipt to the selected printer.

You have now successfully printed a return receipt from the Check In window.

If you did not select to print some of the return receipts while in the Check In window, axiUm notifies you when closing this window. Clicking **Close** displays the following message.

   ![Print Question](image)

Click Yes to print to the default printer.

**Printing Return Receipts From the Dispensary Window’s Tabs**

You can print return receipts from the Dispensary History tab only.

▼ **To print a return receipt from the Dispensary History tab:**

1. Check in an item.

   For instructions on checking in an item, see *Checking Items In* on page 83.
2. Search for dispensary items in the Dispensary History tab.

For instructions on searching for dispensary items in the Dispensary History tab, see *Searching for Activity History of Dispensary Items* on page 73.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
<th>Bar Code</th>
<th>Prov</th>
<th>Provider</th>
<th>Date Out</th>
<th>Time Out</th>
<th>Disp. 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCO5</td>
<td>Pacifier Box and Case</td>
<td>01PCO500055</td>
<td>D1257</td>
<td>Mary Jones</td>
<td>07/06/2019</td>
<td>09:42 AM</td>
<td>D1SP2</td>
</tr>
<tr>
<td>PG05</td>
<td>Pacifier Box and Case</td>
<td>01P1000055</td>
<td>D1257</td>
<td>Mary Jones</td>
<td>07/06/2019</td>
<td>09:42 AM</td>
<td>D1SP2</td>
</tr>
</tbody>
</table>

3. From the list view, highlight an item.

4. Right-click to display a list of options.

5. Select the **Print Receipt** option.

   axiUm displays the Select Printer window.

6. Highlight an item. This is the printer you want to print to.

   💡 You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

7. Click **Select**.

   axiUm prints the receipt to the selected printer.

You have now successfully printed a return receipt from the Dispensary window’s Dispensary History tab.
11.3 Printing Receipts for Items Transferred

When items are transferred to your dispensary location and scanned in, you have the option to print a transfer receipt at that time to confirm items received at that dispensary location.

To print a transfer receipt:

1. Transfer a kit.

   For instructions on transferring kits, see Transferring Items to Other Locations on page 101.

2. Click Print.

   axiUm displays the Select Printer window.

3. Highlight an item. This is the printer you want to print to.

   ![Select Printer Window]

   You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

   axiUm prints the receipt to the selected printer.

You have now successfully printed a transfer receipt from the Dispensary window’s Dispensary History tab. You may be required to sign your name on the signature line of the transfer receipt.

11.4 Printing Billing Receipts & Statements

The receipts and statements print dispensary charges for the provider in the date range.

The Statement button in the Dispensary Billings window is for billing purposes, like if the student owes money because they broke it, there will be a charge and show on the statement.
12 Printing Lists

You can only print lists displayed in the tabs, not individual items from the tab’s dispensary list. For example, you can print all items displayed in the Requests tab’s list view, but you cannot select individual records to print.

Depending on your workstation setup, axiUm may display different print windows. Your workstation may default to the previously selected printer, including the folder you selected if you printed the report to file. Or you may be prompted to select a printer.

In the following example, we will search for kit levels in the 2nd Floor Dispensary.

▼To print the request list:

1. Search for kit levels in DISP2, 2nd Floor Dispensary.

   For instructions on searching kit levels, see Searching for Kit Inventory Levels at a Location on page 72.

   axiUm displays 2nd Floor Dispensary’s kit levels.

<table>
<thead>
<tr>
<th>Requests</th>
<th>Dispensary Out</th>
<th>Dispensable</th>
<th>Kit In</th>
<th>Kit Levels</th>
<th>Dispensary Rating</th>
<th>Instruments</th>
<th>Lost Items</th>
<th>Provider Est</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISP2</td>
<td>ACR1</td>
<td>Acrinic Bar Block</td>
<td>0</td>
<td>15</td>
<td>15</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>ADF1</td>
<td>Acne Adaptin 1</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>AMSC</td>
<td>Acne Equipment Box</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>ASCL</td>
<td>Acne Scope</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>BAC1</td>
<td>Basic Cassette</td>
<td>0</td>
<td>15</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>BCT1</td>
<td>Bacteric Kit</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>BPED1</td>
<td>Blood Pressure Monitor</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>CT1</td>
<td>Composite Tigt</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>CRH1</td>
<td>Crew Remover</td>
<td>0</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>CVHP</td>
<td>Cervical Triage</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>CVTR</td>
<td>Cervix</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>DRH1</td>
<td>Digital-View Scans</td>
<td>0</td>
<td>12</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>DRH2</td>
<td>Digital-Ring</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>DTIN</td>
<td>Donor Handle</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>EVON</td>
<td>Divert</td>
<td>0</td>
<td>7</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>EMBN</td>
<td>Endo Burn</td>
<td>0</td>
<td>10</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>ENG1</td>
<td>Endo Surgery Cassette</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>FPOW</td>
<td>Full &amp; Partial Omentum Co.</td>
<td>0</td>
<td>10</td>
<td>10</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DISP2</td>
<td>HANS1</td>
<td>HystoMatic</td>
<td>0</td>
<td>20</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

2. Click Print.

axiUm displays the Select Printer window.
3. Highlight an item. This is the printer you want to print to.

You can print to file by selecting the Print to File checkbox. When you click OK, axiUm prompts you to browse to a directory to save the file.

4. Click Select.

axiUm prints all the requests on the list to the selected printer, similar to how they appear on the Requests tab's list view.

You have now successfully printed a list of items.

13 Processing Inventory Counts

This section describes the dispensary inventory count process. The process can be performed at any time, for any given dispensary. Once the process is started, the dispensary module will operate in count mode throughout the institution. This means items cannot be checked out, checked in, transferred, or sterilized during this process.

This section covers the following topics:

- Setting up for dispensary counting
- Counting dispensary inventory by location
- Appending dispensary inventory
- Printing the Dispensary Count report

13.1 Setting up for Dispensary Counting

This section covers the following topics:

- Enabling dispensary inventory counting
- Disabling dispensary inventory counting
Enabling Dispensary Inventory Counting

Dispensary inventory counts must be done outside normal clinic hours. Once the dispensary has been put into count mode, you cannot check in or check out items from any station even if that location does not want to participate in the count.

The count process applies to all locations. However, when you end the count process, any locations that did not count at least one item are considered excluded from that count. Otherwise they would get errors when checking in/out kits that the kit was not included in the last count. This also excludes those locations from the report when the All Participating Locations option was chosen.

▼To enable dispensary inventory counting:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Count Processes icon.

axiUm displays the Dispensary Count Processes window. For information on the Dispensary Count Processes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Count Processes Window on page 91.

3. Click Start.

axiUm displays the Count Start Warning window.

4. Click Yes.

axiUm switches the Dispensary module to count mode, closes the Count Start Warning window, and returns to the Dispensary Count Process window. The Start
button is greyed and the End button is enabled. The Last Started field shows today’s date.

You have now successfully started the dispensary inventory process. Each dispensary location can now begin the inventory counting process. For instructions on counting a location’s inventory, see Counting Dispensary Inventory by Location on page 134.

The following occurs in the Dispensary module:

- Check In button disappears and the Count button appears in its place on the main dispensary window.
- Right-click Check In and CheckOut options are disabled
- Check Out, Transfer, and Sterilize buttons are disabled

When all the locations have finished counting their dispensary inventory, remember to disable the inventory count process. For instructions on disabling the inventory count process, see Disabling Dispensary Inventory Counting on page 132.

Disabling Dispensary Inventory Counting

Once the inventory count process is complete for all the dispensary locations, you must disable the dispensary count process so that dispensary locations are able to conduct daily dispensary activities.
To disable dispensary inventory counting:

1. Go to Maintenance module's Dispensary tab.
2. Double-click the Dispensary Count Processes icon.

   axiUm displays the Dispensary Count Processes window. For information on the Dispensary Count Processes window, refer to the axiUm Reference Manual for Maintenance and see Dispensary Count Processes Window on page 91.

3. Click End.

   axiUm displays the Count End Warning window.

4. Click Yes.

   axiUm switches the Dispensary module to regular mode, closes the Count End Warning window, and returns to the Dispensary Count Process window. The End button is greyed and the Start button is enabled. The Last Started field shows the start date of the last inventory count.

You have now successfully disabled the dispensary inventory count. Each dispensary location can now conduct daily dispensary activities again.
The following occurs in the Dispensary module:

- The Count button disappears and the Check In button is displayed in its place on the main dispensary window.
- Right-click Check In and CheckOut options are enabled.
- Check Out, Transfer, and Sterilize buttons are enabled.

### 13.2 Counting Dispensary Inventory by Location

Before you begin counting your location’s dispensary inventory, make sure that your institution has enabled all locations for dispensary counting. For information on enabling dispensary counting, see *Enabling Dispensary Inventory Counting* on page 131.

**To count your location’s dispensary inventory:**

1. Click on **Count**.

   axiUm displays the Dispensary Count window. For information on the Dispensary Count window, refer to the axiUm Reference Manual for Dispensary and see *Dispensary Count Window* on page 92.

   Alternatively, go to the Maintenance module’s Dispensary tab and click the Dispensary Count Processes icon to display the Dispensary Count Processes window and click the Append button to display the Dispensary Count Window.

2. In the **Kit** field, scan the first dispensary item at your location.

3. Press **ENTER**.

   Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see *Defining Wait Time Between Scanning* on page 57.
axiUm adds the scanned item to the Kits Scanned list and disables the Dispensary drop-down field. When you close and re-open the Dispensary Count window, axiUm clears this list.

4. Continue scanning all items at your location.

5. When you are done counting all the items in your dispensary location, click **Close**.

axiUm closes the Dispensary Count Processes window and returns to the Dispensary window.

Once all counts have been completed the user will return to the Dispensary count processes window in Maintenance and click on the End button to end the count process and return the main dispensary window's full functionality. For instructions on disabling the dispensary location count process, see *Disabling Dispensary Inventory Counting* on page 132.

When the dispensary count process is completed, and you find additional items to add to the dispensary inventory count, you must append these. For instructions on appending, see *Appending Dispensary Inventory* on page 135.

### 13.3 Appending Dispensary Inventory

Appending allows the user to reconcile kits that are found after the initial inventory is complete. This feature allows the user to resume the previous inventory count and scan further found items in, and then reprint the report with the updated numbers.

**To append inventory items to a location with existing inventory:**

1. Begin the dispensary count process.

   For instructions on counting dispensary inventory, see *Processing Inventory Counts* on page 130.

2. Go to **Dispensary** module.

3. Click **Count**.
axiUm displays the Dispensary Count window. For information on the Dispensary Count window, refer to the axiUm Reference Manual for Maintenance and see *Dispensary Count Window* on page 92.

![Dispensary Count Window](image)

4. **In the Kit field, scan the outer bar code on the item.**
5. **Press ENTER.**

   *Alternatively, wait for the timeout period to expire. For instructions on setting a timeout period, see Defining Wait Time Between Scanning on page 57.*

   ![Item scanned](image)

axiUm displays the scanned item in the list view.

6. **When you have finished scanning all new items at this dispensary location, click Process.**

   axiUm uploads the items in the list view into the dispensary count.

7. **Click Close.**

   axiUm closes the Dispensary Count window.

   You have now successfully appended an item to this dispensary location’s inventory count.
13.4 Printing the Dispensary Count Report

▼ To print the Dispensary Count Report:

1. In the **Maintenance** module’s **Dispensary** tab.
2. Click the **Dispensary Count Process** icon.
   
   axiUm displays the Dispensary Count Process window. For information on the Dispensary Count Process window, refer to the axiUm Reference Manual for Maintenance and see *Dispensary Count Processes Window* on page 91.

3. Click **Report**.
   

4. Enter the fields and options. For our example, we will enter the following:
   - **Dispensary count started**: 07/06/2010
   - **Report ordered by**: Dispensary
- Dispensary: DISP2, 2nd Floor Dispensary
- Include sections on: Items counted, Summary

5. Click Print.

The Inventory report has a date column in the Items Scanned section that shows the date it was scanned. The report is sorted so the appended items show at the end of the Scanned section.
This chapter covers some of the problems you may come across while using the Dispensary module, their possible causes, and solutions.

1 Message Boxes

Problem:

Cause:
You clicked the Sterilize button but you have not set up a default sterilization printer in the Default Printer field in the Dispensary Setup window.

Solution:
Setup a default sterilization printer by going to the Dispensary Setup’s Sterilization Printout section and clicking the ellipsis to select a printer from the options. Click OK to save and close the Dispensary Setup window.
**Cause:**
You entered a kit bar code or sundry item type code in the Check In window’s Dispensary Item field that the student did not check out. You may have manually entered this field incorrectly.

**Solution:**
Scan the kit bar code, or manually re-enter the kit bar code or sundry item type code.