

myQLink.net User Guide

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Changes in equipment, software, or procedures occur periodically; information describing these changes will be included in future editions of the manual

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MyQLink Database Customer Login

www.myQLink.net

Cubex Customer Portal

www.cubexsystem.com/customerportal

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Introduction

Thank you for choosing the Cubex System!

The Cubex System helps maximize the efficiency of your practice through proven technology that automates pharmacy and supply management. Our inventory management solutions are designed to control the cost of supplies and support staff with automated inventory tracking.

The Cubex Solution consists of automated dispensing systems, wireless access devices and the myQLink web-hosted software application that together improve the overall performance of the supply chain while providing the data you require to make better-informed business decisions.

Cubex Digital Inventory Solutions work much like an ATM machine that automates the access, control and dispensing of health care, dental, and veterinary supplies

The Cubex System maximizes efficiencies and cost savings by:

- ✓ Reducing inventory holding costs through the elimination of excess inventory
- ✓ Automating manual reorder processes
- ✓ Increasing workflow efficiency by having inventory stocked and available
- ✓ Reducing dental supply consumption by controlling access and standardizing supplies
- ✓ Allowing staff more time to focus on patient care

Who Should Read This?

Practice Owners, Practice Managers, System Administrator(s), Restock Technicians, certified technicians who maintain the Solution System and possess System Administrator's privileges.

Welcome to myQLink.net

myQLink.net is the web based software that allows you to control and manage your inventory remotely from any computer system that has internet connectivity (*Be sure to speak with your Information Systems representative for access to the web*). The myQLink web-hosted software application facilitates the day-to-day management of Cubex Digital Inventory Solutions for a single practice, or across multiple practices, improving the overall performance of the supply chain while providing the data required to make better-informed business decisions.

Contacting Customer Solutions

For immediate assistance, please contact Customer Solutions. Customer Solutions provides telephone support 24/7 and on-site assistance.

US/Canada: 1.866.930.9251

United Kingdom: 0808.189.0365

Australia: 1.800.763.670

New Zealand: 0800.466.190

E-mail: support@cubexsystem.com

Web URL: <http://www.cubexsystem.com>

System Administrator's Role with myQLink.net

System Administrator responsibilities and tasks may include: Implementation of the Solution, stocking locations and data upload; site point-of-contact for controlled substance policy and system utilization; add, edit, or delete, supplies, medications, users, and suppliers; change inventory minimum, maximum and reorder levels, as well as, critical restock levels; change unit cost and maintain current inventory pricing; manage item restrictions and Solution Cabinet zones (doors and/or drawers); generate order and restock lists for performing Scheduled Restocks.

Cubex Customer Portal

The Cubex Client Portal is a compilation of learning resources including a reference library, Cubex University video tutorials, and weekly articles. It is designed for Cubex System Administrators to maximize their use of the Cubex Solution through skill development, continued education, and technical solutions.

Please visit and sign up for email alerts at www.cubexsystem.com/customerportal

Software Requirements

myQLink.net works with Internet Explorer® version 8.0.76 or higher and Windows 7 or higher (myQLink.net is not compatible with Mozilla Firefox or MAC).

To view reports, the PC will need the Crystal Reports Viewer downloaded and installed.

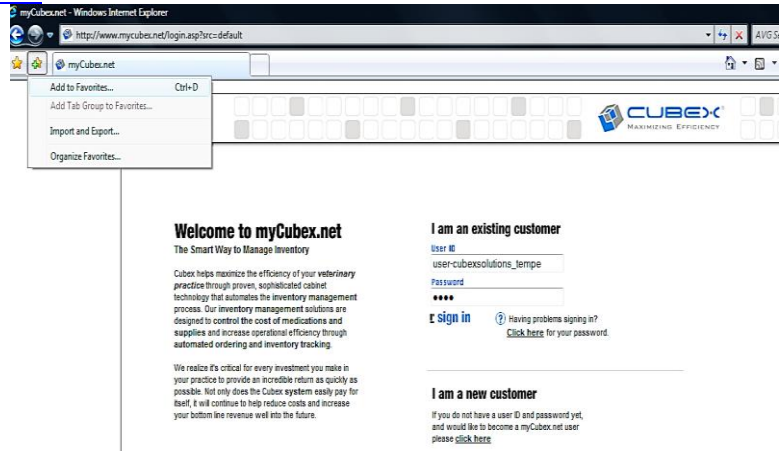
Accessing the myQLink Website

Open Internet Explorer and type www.myQLink.net in the URL. Press ENTER.

Once the Welcome screen appears, add the myQLink.net web address to your Internet Explorer browser's favorites.

Click on the New Favorites > Select Add to Favorites > Add. The myQLink icon will now appear in the favorites menu. Minimize the myQLink window so the desktop is visible and drag the myQLink favorite to the desktop for easy access.

Enter your User ID and Password provided during the implementation. Click Sign In or press Enter



Note: Your myQLink.net User ID will be in the format of UserID@practice_location, this is not the same log in used at the Solution



The Welcome Screen will provide the user three options:

Accessible Database: Organizational database by location

Account Information: Administrator contact and email information

Downloads & Support: Internet Explorer, Crystal Report Viewer, and Support via phone or email

Welcome to myCubex.net

myCubex.net makes it easier to get the most from our automated inventory systems, whether you are managing your inventory, creating purchase orders, or generating reports. It provides real-time online management of your inventory that are being issues on the work floor at your company.

Accessible Databases

- Total 1
- ▼ Cubex Solutions
 - File Server
 - Cubex Solutions (Tempe)

Account Information

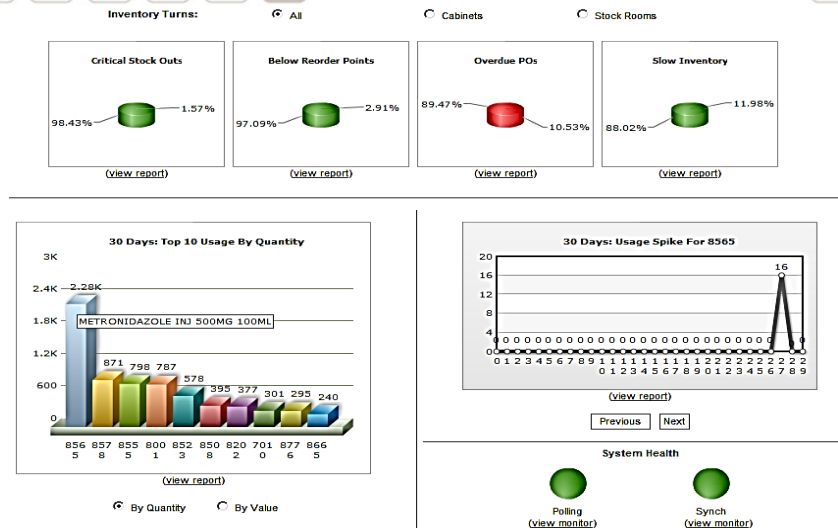
- Accounting
- Change my email address
 - Update my registration information
 - Change my password


Downloads & Support

- Downloads
- Microsoft Internet Explorer 8.0 SP1
 - Crystal Report Viewer 2.11
- Support
- Email Support - Click Here
 - Phone Support - 866.950.9251

The Dashboard

When a user with dashboard privileges logs in, the system will display a high level overview and status of the system. The dashboard displays inventory turns, Top 10 Items Used within the past 30 days, usage spike within the last 30 days, and the system communications. The information is designed to keep the System Administrator informed of system status. *The user may place the mouse pointer on the bar chart to see the item name.*



 **Important:** The Dashboard draws system resources as the database grows. As the database ages, it will grow larger; thereby increasing dashboard loading time. This feature may be turned off from your home screen in "My Profile"

Pop-Up Blockers

System Administrators need to be aware of the pop-up blockers that could potentially stop data windows from opening and providing data. Some security and virus applications block pop-ups as well as some browser toolbars, such as the Google toolbar.

For Internet Explorer 7 and higher, add Protected mode (this will show as "Protection Mode: Off" in the bottom task bar)

myQLink.net General Navigation

Like any software application, continual interaction will increase ease of use; myQLink.net is no different. There is a pattern to the Menu Bar and sub-menu navigation. The main menu is located at the top of the application, known as the Menu Bar.



Search Box

To locate data within the system, utilize the search box in the upper right corner of the screen.

Search


Cabinets Menu

The Cabinet menu is where you manage and edit your Solutions, manage and edit the bins, and control access to each Solution

Click on View Cabinets to show the Solution(s) in your System. The settings can be edited by clicking on the desired Solution, then click Edit on the bottom right of the screen

Cabinets Cabinets Show All Cabinets (2 Cabinets)				Add New Cabinet
Cabinets ▲	Description	Type	Enabled	
01	PHARMACY1	Cabinet	✓	
02	TREATMENT	Cabinet	✓	
				Previous Next

Cabinets | Cabinets | View detail (cabinet 500) * required

Cabinet: *
 Name: * x
 Type: *
 Enabled: ☒
 Supplier: 
 Auto PO: ☒
 PO Method:
 Last Issue:
 Profile Critical Override: ☐
 Enable Cabinet Profile: ☐
 Profile Timeout Period:
 Profile Alive: ☐
 No Profile Overrides Allowed: ☐
 Cabinet Log-Out Password:

Cabinet: This is the Solution number within your System. This is a pre-assigned number and cannot be edited.

Name: This is the name of the Solution. If the Solution name is changed, it must also be changed in the Solution computer or the myQLink.net will not communicate to the Solution and transactions will not be logged.

Type: A Solution can be designated to be a "Cabinet" or a "Consolidated Cabinet". The Consolidated Cabinet setting should be used for Solution(s) that have the same item(s) assigned to multiple bin locations within the Solution. For more information, see Consolidated Cabinet section in this Guide and the Solution Guide

Enabled: Flag should always be checked for use.

Supplier: Select the Supplier from the list if this Solution is used for one supplier only

Auto PO: Ensure Auto PO is checked to receive Automatic Purchase Orders from this Solution

Last Issue: States the date of the last issue from this Solution

Profile Critical Override: This is the main flag that has to be set when the interface fails, to allow regular users, who don't normally have override access, to get to meds that patients may need for first doses. Certain items can be excluded from that override in Item Attributes

Profile Time Out Period: This is meant to be a "Heartbeat Monitor" and this is the time period in minutes of that heartbeat not ticking before the Solution switches to Override Mode. If the interface is not "heard" from in this period, the Profile Critical Override flag is set on that Solution, users who don't normally have the ability to override are allowed to since orders aren't coming through. Certain items can be excluded from that override in Item Attributes

Profile Alive: Inactive at this time

No Profile Overrides Allowed: When checked, this Solution, whether the interface is up or down, you can't allow Profile overrides.

Cabinet Log-out Password: The password that is entered at the login screen to return to the desktop

Consolidated Cabinet

The Consolidated Cabinet setting should be used for Solution(s) that have the same item(s) assigned to multiple bin locations within the Solution. When a PO is generated, the system takes into account the consolidated bins and distributes the order across the consolidated bins based on bin capacity.

The Max for the bin becomes the bin capacity - the limit of items that can be stocked in that bin. The bin capacity across the item's multiple bins will add up to its MultiMax. The sum of the mins across the item's multiple bins create a Multi Min, which becomes the PO trigger. The difference in MultiMax and MultiMin must be equal to or greater than the Order Quantity.

Under Cabinets tab, select the Consolidated Solution then Max/Min. A list of the Solution items will appear indicating how many bins are assigned to the item and the consolidated Multi Max and Multi Min levels.

For more information on how to view/adjust an item's individual bin max/mins, see "Bins" below.

Cabinets

- ▼ Cabinets
 - Show all
 - View detail
 - Defaults
 - Notes
 - History
 - Issues
 - Transactions
 - **MinMax**
 - Bins
 - Access

Site1 (Test)

Cabinets | Cabinets | MinMax (cabinet 500)

◀ Previous Next ▶									
Cabinet ▲	Description	Bins	Order Qty	Capacity	Max	Min	Critical	Level	
01	Tramadol 25mg tablet	2	50	61	61	11	False	2	
01	Tramadol 5mg capsule	1	120	131	131	11	False	0	
01	Tramadol 20mg/ml	1	120	150	150	30	False	0	
◀ Previous Next ▶									

View Bins

Bins

See a complete listing of all bins in the Sug done at the cabinet.

► [View Bins](#)

The Bins Menu allows you to modify Bin Max/Min and Critical levels for assigned items. Select Cabinets Tab, then select View Bins. Search for the item. Select the item description to view the item details. To adjust item details, select Edit in the lower right hand corner

Cabinets

► Cabinets

▼ Bins

► [Show all](#)

► [Max and Min](#)

► [Access](#)

Cabinets | Bins | Cabinets (cabinet 02 - Pharmacy)

Cabinet	Description	Type	Bin	Item Description
01	Surgery/Treatment	Cabinet	01 19	DERACOXIB CHEW TABS 75MG 30CT
02	Pharmacy	Cabinet	01 1A	DERACOXIB CHEW TABS 25MG 90CT
			01 1B	FIROCOXIB DOG L (227MG) 60CT
			01 1C	FIROCOXIB DOG S (57MG) 60CT
			01 1D	CARPROFEN 100MG CHEWS 180CT
			01 1E	CARPROFEN 75MG CHEWS 180CT
			01 1F	CARPROFEN 25MG CHEWS 180CT
			01 20	VITAMIN K1 50MG CHEWTAB 100CT
			01 21	VITAMIN K1 25MG CHEWTAB 100CT

Bin Capacity: For consolidated cabinets: the bin capacity is made equal to the desired Max value for each individual bin. This is because, on creating the Purchase Order, this forces the Purchase Order to distribute the total items being re-ordered across the bins, only filling each bin to the Bin capacity. The Bin Capacity essentially becomes the individual bin Max.

For non-consolidated cabinets: the Bin Capacity can be set to any amount at or above the item's max. This gives the ability to order and restock the bin above the given Max.

Restock: When this box is checked the item will reorder through the Automatic Purchase Order process.

Email if Bin at Critical*: When this is selected, myQLink.net will send an e-mail every 60 minutes until the item is restocked to the maximum quantity. (To set up the email, see the Purchasing Tab > View Suppliers)

Status: Not Available

Form: Form of the Item. To customized Forms, see the Inventory Tab

Pack Quantity: Indicates the amount of Order Units in a Issued Pack. (For Pack use, see the Inventory Section in this guide)

Cubex Training (Tempe)

Cabinets | Bins | View detail (cabinet LB bin 11 00)

Cabinet:

Bin:

Item:

Description 1:

Description 2:

Item Type:

Fractional Issue, Single Use: ☐

Fractional Issue, Multidose: ☒

Bin Capacity:

Restock: ☒

Email if Bin at Critical: ☐

Status:

Form:

Pack Quantity: VIAL per VIAL

Maximum: VIAL

Critical Level: VIAL

Minimum: VIAL

On Hand: VIAL

(Minimum) Order Qty: VIAL

Bulk Order Qty: VIAL per BOX

Issued:

On Order:

Dose OnHand: ML

Maximum: Maximum quantity to stock in bin. This is the amount the POs will order to.

Critical Level*: This level is set below the minimum level for critical items that must not be out of stock. This number is inactive until Critical email is set up in Supplier Attributes

Minimum: Minimum level of items in stock before PO is generated.



*Important: Email address must be added to the supplier under Critical Email for this to take effect



Important: The Min and Maximum Levels **MUST** be in increments of the Order Quantity to order correctly

For Consolidated Cabinets, the Max will be the bin's capacity. When assigning the same item in multiple bins, the bin capacity, added up for all bins, becomes the "Multi-Max" and the "Multi-Min" becomes the PO trigger. The difference between the "Multi Max" and the "Multi Min" is a multiple or greater of the order quantity. An order is received and distributed within the Solution based on Bin capacity.

For Example: Three separate bins contain Drug A. Order Quantity of Drug A is 7 units. The Unit of Issue (UOI) is by the unit.

Drug A	Bin 1	Bin 2	Bin 3	Multi Max	Multi Min
Bin Max (Bin Capacity)	4	4	2	10	
Bin Min	1	1	1		3
Order Point	0	1	2		

To view or edit multiple bin items at once, select Bins > Max and Min > Edit.

Edit the Bin Capacity, Restock Flag, activate the Critical email flag, Max, Critical level and Min. Select Save when changes are complete.

Site1 (Test)
 Cabinets | Bins | Max and Min (cabinet 45)

1 2 [Previous](#) [Next](#)

Bin	Item Description	BinCap	Restock	Email	Max	Crit	Min	UOM	OnHand	OnOrder	OrdQty	Supplier
05 02	One	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>		0	0	1	Vendor1
1111	Slocum 3.5mm TPLO Left	<input type="text" value="40"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="40"/>	<input type="text" value="1"/>	<input type="text" value="3"/>	EACH	0	0	1	WAREHOUSE
999003	AMOXICILLIN 100MG Tab	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="100"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	test1	0	0	1	Schein
EXT1	Slocum 3.5mm TPLO Left	<input type="text" value="40"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="40"/>	<input type="text" value="1"/>	<input type="text" value="3"/>	EACH	0	0	1	WAREHOUSE
EXT2	AMOXICILLIN 100MG Tab	<input type="text" value="100"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="100"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	test1	0	0	1	Schein

[Save](#) [Cancel](#)

View Access This is used to restrict access of individuals or Departments from Solution Zones. At the file menu, select Cabinets then select View Access.

Cabinets | Access | Access Generator (select an employee)

Select Employees		Remove Access From Cabinets	
Employee	Name	Cabinet	Name Doors

[Insert](#) [Delete](#) [Select All](#) [Clear All](#) [Select Department](#)

Insert: To set up restrictions for an individual employees select Insert. This will bring up the list of employees. In the Search box type the first few letters of the employee's first or last name and click Go. Select the Employee. This will add the employee to the Select Employees screen on the left. To select more employees click on each employees name. Once all employees are selected, close the Employee Look Up box by clicking on the Blue X. Under Remove Access from Cabinets box on the right of the screen select Insert. This will bring up the Cabinet Look Up box. This will list all Solution doors/zones in your database. Select the doors/zones that you DO NOT want the selected employees to have access to. Check the boxes for each zone you want to Restrict Access. Select Add Cabinet then Supply and Overwrite. To set up restrictions per Department, follow the steps above by first clicking on Select Department.

Select All: The Select All button is used when all employees will have the same access restrictions. By clicking on the Select All button, all employee names will show up on the select Employees screen.

Clear All: The Clear All button will clear all selections on the Select Employee screen.

Select Department: The Select Department button will show all the Departments in your database when selected.

Remove Access From Cabinets: The options here are for adding and deleting Solution restrictions at the time of setting them

Insert: Once an Employee or Department is selected from the Select Employees screen click on the Insert button to bring up the list of Solutions and Doors. Check the boxes for each zone you want to Restrict Access. Select Add Cabinet then Supply and Overwrite.

Delete: While setting up an Employee or Department restrictions, you can delete the Solutions by checking the box to the right of the Solution then click Delete to remove the restrictions.

To remove the restrictions previously set, select the Database Tab > View Employees > Search and Select the Employee > Select Access on the left sub menu > Check the box of the Zone restricted and select Delete. This will allow the employee to regain access to the zone.

Database

- ▼ [Employees](#)
 - [Show all](#)
 - [View detail](#)
 - [Access](#)
 - [Notes](#)
 - [History](#)
 - [Issues](#)
 - [Transactions](#)
- [Departments](#)
- [Patients](#)
- [Cases](#)
- [Discrepancy Reasons](#)
- [Waste Reasons](#)
- [Custom Fields](#)

Cubex Training (Tempe)

Database | Employees | View detail (employee 01)

No image
available

Employee: 01
 First Name: Sam
 Last Name: Turner
 ID: 01
 PIN: *****
 Active: ✓
 Department:
 Email:
 Administrator:
 Schedule 2 Witness: ✓
 Schedule 2 Cycle Count:
 Schedule 2 Issue: ✓
 Schedule 2 Stock:
 Medication Stock:
 Medication CycleCount:
 Medication Issue: ✓
 Supply Only Issue: ✓
 Attending Doctor:
 Dispensing Doctor:

Inventory Menu

The Inventory Menu is where you manage all Item Information such as, adding or editing items, creating Alternate IDs, Item Manufacturers, Item Unit of Measure, Classes, Categories, or Forms

View Items


Once you click on View Items the screen will bring up all items in the database. By selecting an item from this screen you can Edit, Copy, or Delete the item. Using the Sub-Categories, you can find the Bin location and change Max and Min for that item, view any open POs with that item on it, and view the item's transactions

Edit Item: To edit an existing item, search for the item using the Search Box in the upper right side of the screen. Select the item then click Edit on the bottom right.

The only function that cannot be edited is the item ID. If this needs to be changed, you can Copy the item to change it.

Copy: The Copy function allows you to copy similar items that may have only a dose or quantity difference. This function also allows you to change the Item ID number. If you have an item such as Amoxicillin 400mg. and you are going to add different strengths, you can select Amoxicillin 250mg then click the Copy option on the lower right corner of the page. Once you click Copy you can add the Item ID and make the appropriate changes with the item description, order Quantity, pricing, etc.

Delete: This option is used to delete an item from the myQLink.net database.

 Important: If an item is assigned in the cabinet or has an outstanding Purchase Order it will not be able to be deleted

Use Caution when deleting. Historical data will be lost

To View Item Transactions

Once an Item has been selected, the transactions can be viewed in a list format by selecting Transactions from the sub menu on the left column. For more detail on the individual transaction, click on the transaction line item.

Adding New Items

Prior to logging into myQLink.net, collect the data needed for data input. Gather the necessary reorder information such as cost data and replenishment form. Visualize how the item will be removed from the Solution (tab, cap, ml, vial, box, etc.) Log in with System Administrator rights and select the site's accessible database. On the menu bar, select Inventory. On the primary pane select View Items. In the upper right, select Add New Item. Begin the data input with the information that describes the product to issuing users, restocking users, and purchasing agents. Note: Items with a red asterisk denote required fields.

Item Attributes

***Item ID:** Unique alpha or numeric sequence to be used as a key identifier within the database. This number will be the practice management number, if applicable. Characters other than hyphen or space are not permitted.

***Description 1:** Full Item description with units. Input the data as a user would performing a search with the most popular used name and strength/ size. This field is limited to 35 alpha numeric characters.



, " ' # % * characters are not permitted

Description 2: This field is for a generic name, or if your practice calls the item by another name.

Alternate Name: Alias for user to cross reference. This will not be displayed on the Solution issue list.

Item Type: Select Item Type from the drop down list. Medication selection will allow dose, form and volume fields available for input. Supply selection will deselect availability to edit Form, Dose, and Volume.

Drug Schedule: Enter the 1-5 drug class for each controlled substance (or any medication you would like treated as a controlled substance). Non controlled medications are listed as 6; Supplies are listed as 0. All other schedules can be used for unique items that need restriction or to be treated separately from other items. Example: Keys, Rx Labels, etc.

Category: Enter the category for this item. Used for User Privileges and Templates. Leave defaulted if there are no restrictions on this item. Set up Item Categories in Item Categories in Inventory Tab

Fractional Issue, Multi-dose: Use for fractional dosing of liquids, injectables, and tablets. A decimal point is provided for the user when dispensing the medication. This feature is recommended for multi-dose vials and bottles.

Fractional Issue, Single Use Item: For single use items, like pre-filled syringes. In this case, the whole contents of the syringe will be recorded as issued, and the difference between the full content of the syringe and the dose the user entered will be record as a waste transaction at the time of issue. If the user needs to subsequently change the waste, they can return to

the cabinet, look up the transaction, and decrease or increase the waste up to the full amount issued.

Form of Administration: (Medication) How the medication will be administered to the patient. Examples: oral, topical, injectable

Strength Numerator: (Medication) Enter a numeric value. In the drop down menu to the right, add the Unit of Measure (UOM) i.e. mg, ml, mcg, mEq, oz, etc. Example: 5mg

Strength Denominator: (Medication) Enter a numeric value for the volume including the **Fractional Dose Units** which indicated the units of the dose at the time of issue. Example: 1ml

Total Amount in Unit of Cabinet Restock: Volume per container size. Issue units in a restock unit. Example: 10ml in a Vial. This is the amount the system will calculate waste from for a Single Dose Vial.

Minimum Order Quantity: Defaulted to equal the Supplier portion lower on the page

Bulk Order Quantity: Defaulted to equal the Supplier portion lower on the page

***Supplier Choice 1-3:** Indicate the primary or default supplier 1, 2 or 3. Supplier information is filled in at the bottom of the screen.

User Defined Text: *(Future Release)*

NDC Number: (Numeric National Drug Code) Text box for unique product identifier for drugs used in the United States

NDC on Restock: Allows entry of a NDC number during a restock of an item

NDC on Issue: Allows entry of a NDC number during an issue of an item in the event a bin contains multiple NDCs

External Item: Item will be stocked outside the Solution, but tracked through the system. External items cannot reside both inside and outside the Solution. They will need different item ID#s. Must be check for QBud items

Refrigerated Item: *(Legacy flag for OmniCell Cabinet users)* In current settings, the fridge name will show on issue if set in the Fridge Admin Screen. If not set, the bin number of the item's location will show on issue

Billable Item: Identifies an item that would be billable to the patient through third party interface, if applicable

Billing ID/J-Code: HCPCS Level II J-Code Billing Identifier or other Billing ID (available for other industries)

Billing unit of Measure: What are the billing units? mg? ml? tab? Etc

Issue/Dose Units to Billing units conversion: How many issue units are in a billing unit? Dictated by J-Codes. Can also be used in other industries. This field accepts a decimal point when needed to accomplish the conversion. Defaulted to 1

Round Billing Quantity up to Nearest Integer: Indicates Decimal Billing Quantities need to be rounded up to nearest integer (whole number) quantity.

Issue Witness: Two users required to access the item

Waste Witness: During issue process, this function will require two users to document waste

Restock Witness: Two users are required to restock the item

Cycle Count Witness: Two users required to Cycle Count item

Can Return to Issue Location: Allows user to return item back to the original bin.

Return only to Return Bin: For items that cannot be returned to the original issue location, but are returned to an designated return bin (Cubie) within the Solution

Countback: Initial count of the bin during the transaction. Once access is gained to the bin, the user will be prompted to verify the beginning count, verifying the last user's entered quantity. The bin quantity will deduct the requested issue amount after the count has been verified.

Blind Countback: As in Countback mentioned above, but the beginning count will not appear on the screen; the user will be required to input a count into a blank text box.



The Countback box (above) must be selected in conjunction with this option.

Container Number on Restock*: For controlled items that have a container number assigned by the practice, the user will be requested to input the container number during the restock process

Container Number on Issue*: As mentioned above, this feature is used to track controlled item containers. The user is prompted to verify the container number during the Issue process

Lot Number on Restock*: Used to track medical supplies and medications restocked in the Solution. During the restock process the user will be prompted to enter the item lot number

Lot Number on Issue*: As mentioned above, this function is used to track medical supplies and medications issued to patients. The user will be prompted to verify the item lot number during the issue process.

Expiration Date on Restock*: Used to track medication and supplies that expire to reduce or eliminate monthly medication expiration date check. The user will be requested to input item expiration date during the restock process. (*Used alone for Simple Expiration – see Note*)

Expiration Date on Issue*: Used to track medication & supplies that may expire to ensure expired meds & supplies are not in the stocked or issued to patients.

The user will be prompted to verify the expiration date during the issue process.

Emergency Item: Future Release

Emergency Dose: Future Release

Item Class: Used in conjunction with the Item Class list in the popup window. The user may select the magnifying glass for list selection of item classes.

Exclude from Critical Override: When checked, this feature will NOT allow a "Profile Override, Critical" user to add this item to a Patient Profile. Only "Profile Override" delegated users can add this item to a Patient Profile

Rx Check Needed: **This is a feature for the CRx Station.** When enabled, a secondary check will be required for this item prior to transport. Must be check in both Databases

Pharmacy Owned: **This is a feature for the CRx Station.**

This item is supplied via Cubie Replenishment from an supplying Pharmacy

Active: Ability to Activate or Deactivate an item

***Supplier:** Supplier providing this item. Click on magnifying glass for list selection and select a supplier. The asterisk denotes this is a required field, the supplier list may be modified in the Purchasing Menu

***Supplier Item:** Supplier order number from supplier catalog. This number will show up on the Automatic PO sent to the Supplier. If unknown, will be defaulted to 99999999

Supplier Minimum Order Quantity: Enter the minimum amount to order. This must be equal to or greater than the Bulk Order Quantity

***Supplier Bulk Order Quantity:** In the first field add a numeric value. The second field (form) are the units in the Order. The third field is used for the unit of measure used in ordering the product. How is the product sold and shipped?

Supplier Bulk Order Price: Numeric field for the cost of a Bulk Order Unit

Supplier Manufacturer: Select the manufacturer for this item. The manufacturers may be added on secondary pane to the left. Select Manufacturers

Mfg. Item: Add the manufacturer's number in this field

Supplier NDC: Enter Supplier specific NDC for the item

Account #: Add the supplier's account number or general ledger code in this text field

Lead Time: The amount of time it takes for an order to be submitted, processed, and delivered by the wholesaler

Last Review: Date field to record for replacement item or pricing update

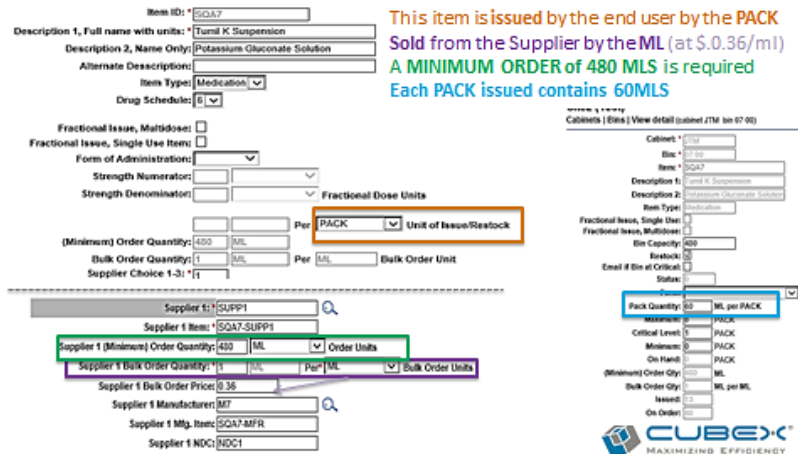
***Container Expiration Date:** "Container Number on Issue and Restock" must be checked to use the Lot Number and Expiration Date feature for each individual container (i.e. for when each bottle or vial will expire)
Items already assigned must be de-assigned then reassigned for the above feature to function

***Simple Expiration Date:** Flagging "Expiration Date on Restock" alone will provide a single expiration date for the bin as entered during the Assignment, Restock, or Cycle Count process (i.e. The expiration date for all items in the bin that is entered for the soonest expiration date)

Pack Issue

The "Pack Issue" feature is only indicated for supply items and Non-Fractional Issue mediations.

This feature allows the item to order in small units but issue in larger, "Pack" quantities from the Solution. In the below example, the item is set up to order by the ML a minimum of 480 mls every order and will be issued in a pack of 60ML

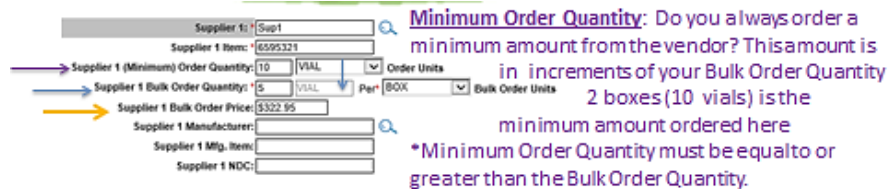


Item ID: SQA7
Description 1, Full name with units: Tumil K Suspension
Description 2, Name Only: Potassium Gluconate Solution
Alternate Description:
Item Type: Medication
Drug Schedule: 0
Fractional Issue, Multidose: ☐
Fractional Issue, Single Use Item: ☐
Form of Administration:
Strength Numerator:
Strength Denominator:
Fractional Dose Units:
(Minimum) Order Quantity: 480 ML
Bulk Order Quantity: 1 ML
Supplier Choice 1-3: 1
Supplier 1: SUPP1
Supplier 1 Item: SQA7-SUPP1
Supplier 1 (Minimum) Order Quantity: 480 ML
Supplier 1 Bulk Order Quantity: 1 ML
Supplier 1 Bulk Order Price: 0.36
Supplier 1 Manufacturer: M7
Supplier 1 Mfg. Item: SQA7-MFR
Supplier 1 NDC: NDC1

Annotations:
 - This item is issued by the end user by the **PACK**
 - Sold from the Supplier by the **ML** (at \$0.36/ml)
 - A **MINIMUM ORDER** of 480 MLS is required
 - Each **PACK** issued contains 60MLS
 - **Unit of Issue/Restock:** PACK
 - **Per:** ML
 - **Bulk Order Unit:** Bulk Order Unit

Minimum Order Quantity

This setting allows the item to be set to order a minimum amount each order.

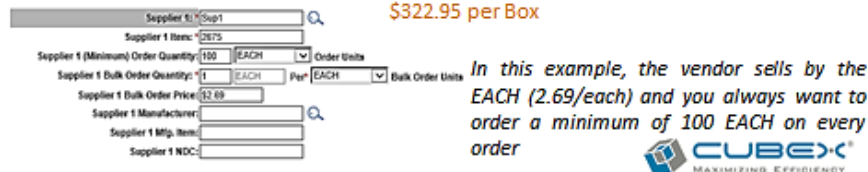


Supplier 1: Sup1
Supplier 1 Item: 6595321
Supplier 1 (Minimum) Order Quantity: 10 VIAL
Supplier 1 Bulk Order Quantity: 5 VIAL
Supplier 1 Bulk Order Price: \$322.95
Supplier 1 Manufacturer:
Supplier 1 Mfg. Item:
Supplier 1 NDC:

Annotations:
 - **Minimum Order Quantity:** Do you always order a minimum amount from the vendor? This amount is in increments of your Bulk Order Quantity
 - 2 boxes (10 vials) is the minimum amount ordered here
 - *Minimum Order Quantity must be equal to or greater than the Bulk Order Quantity.

Bulk Order Quantity: How is this sold? Packaged and sent by the vendor? 5 vials per Box here

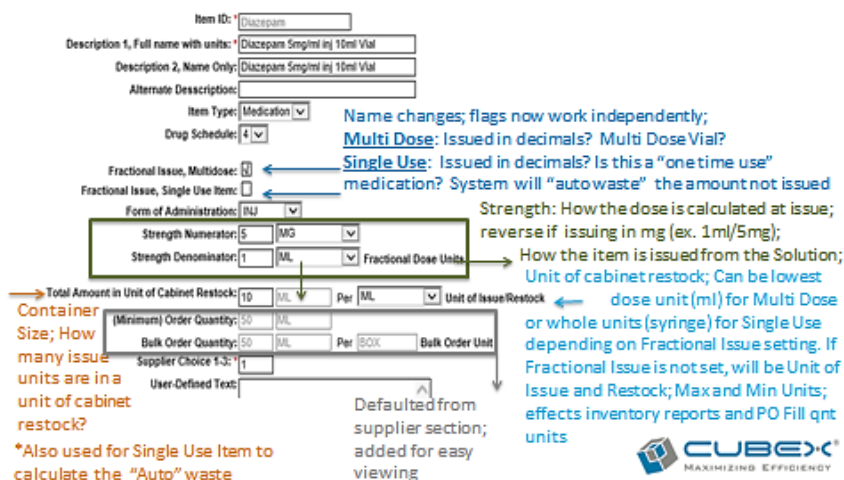
Bulk Order Price: Price for the "Bulk Order Units". \$322.95 per Box



Supplier 1: Sup1
Supplier 1 Item: 12675
Supplier 1 (Minimum) Order Quantity: 100 EACH
Supplier 1 Bulk Order Quantity: 1 EACH
Supplier 1 Bulk Order Price: 32.69
Supplier 1 Manufacturer:
Supplier 1 Mfg. Item:
Supplier 1 NDC:

Annotations:
 - In this example, the vendor sells by the EACH (2.69/each) and you always want to order a minimum of 100 EACH on every order

Sample Item Setup



Item ID: Diazepam
Description 1, Full name with units: Diazepam 5mg/ml in 10ml Vial
Description 2, Name Only: Diazepam 5mg/ml in 10ml Vial
Alternate Description:
Item Type: Medication
Drug Schedule: 4
Fractional Issue, Multidose: ☒
Fractional Issue, Single Use Item: ☐
Form of Administration: INJ
Strength Numerator: 5 MG
Strength Denominator: 1 ML
Fractional Dose Units:
(Minimum) Order Quantity: 50 ML
Bulk Order Quantity: 50 ML
Supplier Choice 1-3: 1
User-Defined Text:

Annotations:
 - Name changes; flags now work independently;
 - **Multi Dose:** Issued in decimals? Multi Dose Vial?
 - **Single Use:** Issued in decimals? Is this a "one time use" medication? System will "autowaste" the amount not issued
 - Strength: How the dose is calculated at issue; reverse if issuing in mg (ex. 1ml/5mg);
 - How the item is issued from the Solution;
 - Unit of cabinet restock; Can be lowest dose unit (ml) for Multi Dose or whole units (syringe) for Single Use depending on Fractional Issue setting. If Fractional Issue is not set, will be Unit of Issue and Restock; Max and Min Units; effects inventory reports and PO Fill qty units
 - Total Amount in Unit of Cabinet Restock: 10 ML
 - Container Size; How many issue units are in a unit of cabinet restock?
 - *Also used for Single Use Item to calculate the "Auto" waste
 - Defaulted from supplier section; added for easy viewing

Med Equivalents *(for Patient Profile Users only using cabinet software version 35 or higher)*

By setting Med Equivalents, the system will be able to issue an equivalent item if the original item is not available. For example: An order for 500mg Amoxicillin can be fulfilled by issuing two 250mg Amoxicillin, an item which has a different item ID.

To set up Med Equivalent Items, select View Med Equivalent in the Inventory Tab. Select Add New Equivalent Item. Use the magnifying glass to search and select the Original Item, in this case Amoxicillin 500mg. Use the second field to search and select the equivalent item, Amoxicillin 250mg. Set the number of equivalent items equal to the original item. In this case, it takes two Amoxicillin 250mg to equal one Amoxicillin 500mg. Select Save to save the new equivalent item.



Inventory

- Items
- ▼ Med Equivalents
- Med Combos
- Alternate IDs
- Manufacturers
- Form
- UOM
- Item Class
- Cycle Counting

Site1 (Test)

Inventory | Med Equivalents | Add New Equivalent Item

► [Add New Equivalent Item](#)

Item:*	<input type="text" value="MBC12"/>	
Description 1:	<input type="text" value="Amoxicillin 500mg"/>	
Equivalent Item:*	<input type="text" value="MBC11"/>	
Description 1:	<input type="text" value="Amoxicillin 250mg"/>	
Number of Equivalent Items equal to original Item:	<input type="text" value="2"/>	
		► Save ► Back



Med Combos *(for cabinet software version 35 or higher)*

Setting Med Combos allows a medication to be linked to an associated medication or supply that needs to be combined with the first medication. For Example: Anytime a unit of insulin is selected to be issued from the Solution, an insulin syringe will be issued automatically with it.

To set up a Med Combo, select View Med Combos in the Inventory Tab. Select Add New Combo Item. Use the magnifying glass to search and select the Primary Item, in this case the insulin. Use the second field to search and select the Combo item, in this case, the syringe. Set the number of Combo items equal to the original. In this case, any time insulin is issued, one syringe will be issued. Check the box at the bottom for the the Combo item to be issued in multiples based on the Primary item issue amount. Example: If the user issues out 1 unit, 1 Combo item will be issued; if 2 units are issued, 2 Combo items will be issued, etc. This items amount will be dynamic based on the issue amount.

- Items
- ▼ Med Equivalents
- ▼ Med Combos
 - Show all
 - View detail
- Alternate IDs
- Manufacturers
- Form
- UOM
- Item Class
- Cycle Counting
- Item Categories

Inventory | Med Combos | Add New Combo Item

Item:*	<input type="text"/>	
Description 1:	<input type="text"/>	
Combo Item:*	<input type="text"/>	
Description 1:	<input type="text"/>	
Combo Item Dose:	<input type="text" value="0"/>	
Use above number to multiply the main item does to get the Combo Item Dose:	<input type="checkbox"/>	

Alternate ID

Inventory items can commonly be used for different purposes within a facility. These primary items can be set up with Alternate IDs and alternate descriptions to carry a different purpose associated with the Alternate ID yet still be assigned to the same single product. The end user will have the option of selecting this Alternate ID during an Issue/Return/Waste transaction.

View Alternate IDs

From the item listing page you will be able to view a detailed listing. You will be able to Add or Edit each Alternate ID

Adding an New Alternate Item ID

From the View Alternate ID page, select Add New Alternate ID. Select the magnifying glass to the right of the Item ID to search and select an existing item in the Database.

Fill in the new Alternate ID and Alternate Descriptions to identify it to the end user. Descriptions can be up to 60 characters in length.

Active: Check if this Alternate ID is to be viewed and used by the end user. Uncheck to de-activate.

Billable: Check if linked to a Data Interface to a Third Party System for charge capture against the specific Alternate ID


If unchecked, charge capture data will not be sent to a Third Party System for transactions performed against the specific Alternate ID.

Once the Alternate ID is set as active, the end user will have the option of selecting the Alternate description during a Pre-select transaction for button, non-button, and external items transaction.




This feature is not for use with Touch to Take options or QBuds.

Inventory | Alternate IDs | Add New Alternate ID ▶ Add New Alternate ID

Item ID:	<input type="text"/>	
Description 1, Full name with units:	<input type="text"/>	
Description 2, Name Only:	<input type="text"/>	
Alternate ID:	<input type="text"/>	
Alternate Description 1:	<input type="text"/>	
Alternate Description 2:	<input type="text"/>	
Active:	<input checked="" type="checkbox"/>	
Billable:	<input type="checkbox"/>	

▶ Save
▶ Delete
▶ Back

Inventory | Alternate IDs | Add New Alternate ID ▶ Add New Alternate ID

Item ID:	<input type="text" value="12345"/>	
Description 1, Full name with units:	<input type="text" value="Amoxicillin 400mg tab"/>	
Description 2, Name Only:	<input type="text" value="Amoxicillin 400mg tab"/>	
Alternate ID:	<input type="text" value="12345a"/>	
Alternate Description 1:	<input type="text" value="Amoxicillin 400mg Out Patient Bill"/>	
Alternate Description 2:	<input type="text" value="Amoxi 400 mg Out Patient Bill"/>	
Active:	<input checked="" type="checkbox"/>	
Billable:	<input checked="" type="checkbox"/>	

▶ Save
▶ Delete
▶ Back

Edit: Select Edit to edit an existing Alternate ID

Delete: Select Delete to delete an existing Alternate ID



Deleting an Alternate ID causes historical data loss. It is recommended to deactivate instead.

View Manufacturers

Manufacturers

See a complete listing of all manufacturers in the system. You will be able to edit each manufacturer, delete manufacturers.

► [View Manufacturers](#)

From the manufacturers listing page you will be able to view a detailed listing. You will be able to add, edit, or delete manufacturers.

View Form

Form

See a complete listing of all forms in the system. You will be able to edit each form, delete forms.

► [View Form](#)

From the Form listing page you will be able to view a detailed listing. You will be able to add, edit, and delete forms.

Inventory | Form | Show All Form (24 forms)

Form ▲	Description
BOX	Box
BTTL	BOTTLE
CAN	Can
CAP	Caplet
CC	Cubic Centimeter
EACH	Each

View Unit of Measure (UOM)

UOM

See a complete listing of all UOM in the system. You will be able to edit each UOM, delete UOMs.

► [View UOM](#)

From the UOM listing page you will be able to view a detailed listing. You will be able to add, edit, and delete UOMs.

Inventory | UOM | Show All UOM (27 uom)

UOM ▲	Description
BAG	Bag
BOX	Box
BTTL	Bottle
CAN	Can
CAP	Caplet
CASE	CASE
CC	—

Item Class

Item Class

See a complete listing of all item class in the system. You will be able to edit each item class, delete item classes.

► [View Item Class](#)

From the Item Class listing page you will be able to view a detailed listing. You will be able to add, edit and delete item classes.

Inventory | Item Class | Show All Item Class (7 classes)

Item Class ▲	Description
C-2	CONTROLLED SUBSTANCES
FOOD	FOOD
HOSP	HOSPITAL
INJ	INJECTION
MED	MEDICATION
SS	SURGICAL SUPPLIES
SUTURE	SUTURES

Item Categories

Item Categories

See a complete listing of all item categories in the system. You will be able to edit each item category, delete item categories.

► [View Item Categories](#)

From the Item Category listing page you will be able to view a detailed listing. You will be able to add, edit and delete item Categories.

Database Menu

The Database Menu is where you manage all Employees, User Templates, Departments, Patients, and customize the Database

View Employees

Employees

See a complete listing of all employees in the
You will be able to edit each employee, delete

► [View Employees](#)

The View Employees field reveals the users entered in the database and their individual attributes or Templates. Here, users can be added, deleted, or modified.

Adding a New User

Prepared with the new user's name, employee numbers, Solution User ID & Password, log into myQLink.net with Administrator rights and select Database on the main menu bar. From the Database screen, select View Employees. Select Add New Employee.

** Fields with a red asterisk denote required data elements.*

Enter the employee number, first & last name, User ID, and the password or PIN number the user will use at the Solution to access items.



The PIN is a 1 to 4 digit password either letters or numbers or combination of both

Check the Active box to activate the new user's login. Select the magnifying glass to the right of Department and choose, if applicable.

User Permissions

Special Privileges: Permissions only a high level user should have.

Administrator: When checked, this will give the user the Admin button to Assign/De-Assign, Setup Zones, change Max and Min levels, change Software settings, etc. This will also give this user the Restock and Cycle Count button (exception is if an Access Privilege is assigned to this user which will override this)


Attending Doctor: When checked, this Employee will appear on the Doctor Selection Screen during the issuing/return process (if this feature is enabled in Software options at the Solution)

Dispensing Doctor: Allows a Doctor or other users to bypass the witness feature for an item requiring a witness to complete the transaction

Rx Check Authorized (For use with CRx Station) Allows the user to perform the second check during the verification process prior to item transport.

Database | Employees | Add New Employee (* required)






No image available

Employee: *
First Name: *
Last Name: *
ID: *
PIN: *
Active: ☒
Department: 
Email:
Administrator: ☐
Attending Doctor: ☐
Dispensing Doctor: ☐
Rx Check authorized: ☐

Legacy Privileges

Controlled Substance Witness: ☐
Controlled Substance Cycle Count: ☐
Controlled Substance Issue: ☐
Controlled Substance Stock: ☐
Medication Stock: ☐
Medication Cycle Count: ☐
Medication Issue: ☐
Supply Only Issue: ☐
Supply Stock: ☐
Supply Cycle Count: ☐
Profile Override: ☐
Profile Override, Critical: ☐

Access Privilege Selection (Cabinet Release 35 on)

Access Privilege 1: 
Access Privilege 2: 
Access Privilege 3: 
Access Privilege 4: 
Access Privilege 5: 

Legacy Privileges: Permissions used in prior versions of the Software. These are still available for use but will be overridden if an Access Privilege (or User Template) is added.

Controlled Substance Witness: Allows user to Witness a Schedule 2-5 drug transaction and Witness a Discrepancy Resolution.

Controlled Substance Cycle Count: Allows user to inventory Schedule 2-5 drugs

Controlled Substance Issue: User may issue items saved as Drug Schedule 2-5

Controlled Substance Stock: User may restock Schedule 2-5 drugs

Medication Stock: User may restock bins that contain items saved as Medications

Medication Cycle Count: User may inventory bins that contain items saved as Medications

Medication Issue: User may Issue items saved as Medications

Supply Only Issue: User may issue only the items saved as a Supply.

Supply Stock: User may restock bins that contain items saved as Supply

Supply Cycle Count User may count inventory bins that contain items saved as a Supply

Viewing Employee Transactions

Once an Employee has been selected, their transactions can be viewed in a list format by selecting Transactions from the sub menu on the left column. For more detail on the individual transaction, click on the line item.

Profile Override: When checked, this feature allows a user to add any items, on the spot, to an existing Patient Profile in Profile Mode

Profile Override, Critical: When checked, this feature allows a user to add items, on the spot, to an existing Patient Profile in Profile Mode. These users will NOT be able to add items that have been set up to "Exclude from Critical Override" in Item Attributes.

Access Privilege: Use the blue magnifying glass to select an Access Privilege (or User Template). To set up Access Privileges, see the next section. Once selected, the Access Privilege will override any Legacy Privilege.

Select **Save** in the lower right side of the display to save changes

Copy: In the event you need to change an Employee's Practice ID or duplicate the Attributes for another new employee, you can select the Copy function and make the change or addition

Delete (not recommended): This function is used to delete an employee from the database.



Once the user is deleted, their historical transactions will be lost.

To **Deactivate** the User, uncheck the active box

Access Privileges

Access Privileges are User Templates that defines the user's access in more detail. In these Templates, Drug Schedules can be separated and Items assigned with a Category can be listed as accessible or restricted. These templates override the Legacy privileges.

Privilege Name: Enter the title for this template

Description: Enter the description of the template

Privilege Matrix: Complete the Matrix using the check boxes. These users will be able to perform any action checked for any Drug Scheduled checked. (Drug Schedule is set in the Item Attributes. See the Inventory Tab section for more detail)

Item Category Access: All

When checked, the user that is assigned this template will be restricted to any Item Category listed below.

When unchecked, the user that is assigned this template will be allowed access to any Item Category listed below. The user must have access to the schedule in the Matrix of the drug that is listed in the Item Category.

Item Categories are setup in the Inventory Tab and must be setup before assigning them to a template.

Once the Matrix and Category allowances or restrictions are assigned, the template can now be assigned to the employee.

General Rules and Conditions

1. If the category is Blank in the item Attributes, only the schedules given can be accesses. i.e. if you have access to a Schedule II and the item does not have a category attached to it you will have access to it. Conversely, if you have access to Schedule II but an item has a category attached to it, you will have access to all items EXCEPT the item with a category UNLESS they are given that category ("Inclusion") in the Template.
2. If a Category is present on a template, the user MUST have the schedule allowed (whether it is 6, 2, or 0, they must have access to it). The Schedule is higher than Category in the rights hierarchy, so they must have the Schedule rights in order to see an Item with a corresponding Category assigned under it. Since Schedule is up above Category, they have access to the entire Schedule and the INCLUDED Categories under that Schedule, but if they EXCLUDE a Category ("Exclusion") then they still have access to everything in the Schedule that is not excluded.
3. Creation of a Template will not affect "Zone Restriction". Zone Restriction is higher than Category and Schedule in the rights hierarchy, so they must have access to the zone in order to have access to the Schedule or Category within that Zone.
4. If there is not a Category in the Item and no Category listed in the template, the user will have access to all items granted by the above matrix.











Database | Access Privileges

Privilege Name (16 Char):
 Description (64 Char):
 Privilege Matrix:

	Issue	Return	Waste	Cycle Count	Scheduled Restock	Supplemental Restock	Witness	Override Witness	Profile Override	Title Override Critical
Sched00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched06	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched08	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched09	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sched12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Item Category Access: All ☒

If "All" is checked above, Categories below are for EXCLUSION
 If "All" is not checked above, Categories below are for INCLUSION

Category 
 Category 
 Category 
 Category 
 Category 
 Category 
 Category 
 Category 
 Category 
 Category 

View Departments

Departments

See a complete listing of all departments in the listing. You will be able to edit each department

► [View Departments](#)

From the Departments listing page you will be able to view a detailed listing. You will be able to add, edit or delete departments

View Patients

Patients

See a complete listing of all patients in the listing. You will be able to edit each patient, delete patients

► [View Patients](#)

From the patients listing page you will be able to view a detailed listing, be able to add, edit or delete patients.

Adding Patients

From the Menu bar, select Database. Select View Patients. In the upper right of the patient list, select Add New Patient. Enter the Patient ID (Unique Number), the Patient Name, and (for Animal Care) Owner First and Last Name. Complete the other data fields in accordance with the facility's policy and procedure. When finished entering data, select Save in the lower right corner.

For Animal Care

Patient ID:
 Patient Name:
 Temporary: ☐
 DOB:
 First Name, Owner:
 Last Name, Owner:
 Client ID:
 Active: ☒
 Aggressive: ☐
 Sex:
 Breed:
 Species:
 Weight:
 Weight Units:
 Height:
 Height Units:
 Location:
 Patient Notes:
 Last Issue:
 Client Gender:
 Address1:
 Address2:
 City:
 State:
 Zip:
 Country:
 Date of Birth of Client:
 Driver's License Number:
 Client's Phone Number:
 Email:
 Allergies:

For Human Care

Patient ID:
 Patient Name:
 Temporary: ☐
 DOB:
 Active: ☒
 Sex:
 Weight:
 Weight Units:
 Height:
 Height Units:
 Location:
 Patient Notes:
 Last Issue:
 Address1:
 Address2:
 City:
 State:
 Zip:
 Country:
 Driver's License Number:
 Client's Phone Number:
 Email:
 Allergies:

Editing, Deactivating or Deleting Patients

Edit: To edit a patient's information, select Database from the Menu Bar then Select View Patients. Search and select the patient to deactivate. In the lower right hand corner, select Edit. Make the changes necessary. Select Save to save the changes

Deactivate: To deactivate a patient, select Database from the Menu Bar then Select View Patients. Search and select the patient to deactivate. In the lower right hand corner, select Edit. Uncheck the Active box. When a user searches for a patient at the Solution, they will have the ability to search and Issue/Return/Waste for Active or Inactive patients.

Delete: (*not recommended*) To Delete a patient (including all associated transactions from the database), select Database from the Menu Bar then Select View Patients. Search and select the patient to deactivate. In the lower right hand corner, select Delete. Select Ok in the pop up window to confirm.

To View Patient Transactions

Once a Patient has been selected, the patient transactions can be viewed in a list format by selecting Transactions from the sub menu on the left column. For more detail on the individual transaction, click on the line item.

Edit the Patient Profile

In the event interface connectivity is lost, Patient Profiles may be edited from the myQLink.net database. Med Orders can also be filtered by those that are open, closed, not due yet, or all orders.

To Add Items: From the Main Menu, select Database then View Patient. Search and select the patient then select Patient Items on the left hand column. Select Add New Patient Item. Fill in the Required fields the select Save.

Database | Patients | Patient Items | Add New Patient Item

Patient ID:	0123
Patient Name:	Frank
Profile ID:	<input type="text"/> (Leave blank to have Cubex auto-assign a unique ID)
Charge Code:	<input type="text"/>
Item ID:	<input type="text"/>
Description1:	<input type="text"/>
Description2:	<input type="text"/>
Profile Quantity Required:	<input type="text"/>
Occurrences Requested:	<input type="text"/>
Start Date/Time:	<input type="text"/> 9/18/2014 <input type="text"/> 12:00:00 AM ▲▼
End Date/Time:	<input type="text"/> 9/18/2014 <input type="text"/> 11:59:59 PM
Doctor ID:	<input type="text"/>
Doctor First Name:	<input type="text"/>
Doctor Last Name:	<input type="text"/>
Patient Meds from White Bag:	<input type="checkbox"/>
SIG:	<input type="text"/>
Information and Notes:	<div style="border: 1px solid #ccc; height: 40px;"></div>

To Edit: From the Main Menu, select Database then View Patient. Search and select the patient then select Patient Items on the left hand column.

Select the item in the Profile then select Edit. Editable fields are the following: Charge code, Profile Quantity Required, Occurrences Requested, Schedule (date and time), Canceled, and Sig. information and Notes

Database | Patients | Patient Items | View Detail

Patient ID:	0123
Patient Name:	Frank
Profile ID:	CBX5086328387
Charge Code:	<input type="text"/>
Item ID:	10523
Description1:	Artificial Tears
Description2:	Artificial Tears
Profile Quantity Required:	<input type="text"/>
Profile UOM:	EACH
Strength (from Interface):	
Strength Units (from Interface):	
Last Quantity Issued:	0
Occurrences Requested:	<input type="text"/>
Occurrences Completed:	0
Start Date/Time:	<input type="text"/> 9/18/2014 <input type="text"/> 12:00:00 AM ▲▼
End Date/Time:	<input type="text"/> 9/11/2019 <input type="text"/> 11:59:59 PM
Doctor ID:	<input type="text"/>
Doctor First Name:	Robert
Doctor Last Name:	Smith
Patient Meds from White Bag:	<input type="checkbox"/>
Last Updated (Date/Time):	9/18/2014 11:28:40 AM
Canceled:	<input type="checkbox"/>
SIG:	Use as needed
Information and Notes:	<div style="border: 1px solid #ccc; height: 150px;"></div>

View Discrepancy Reasons

From the discrepancy reason listing page, you will be able to view a detailed listing, add, edit, or delete discrepancy reasons

Discrepancy Reasons

See a complete listing of all discrepancy reasons a detailed listing. You will be able to edit each discrepancy reason.

► [View Discrepancy Reason](#)

Discrepancies occur when an item inventory count is incorrect. Discrepancies can occur during a Cycle Count, Countback, or during a Scheduled or Supplemental Restock. To add Discrepancy Reasons, from the View Discrepancy Listing, click on the Add New Discrepancy Reason option on the top right of the screen. The Discrepancy Reason is to number the discrepancies 1, 2, 3, etc. The Discrepancy box is used for the description of the discrepancy. For example, dropped medication on floor, count in bin was incorrect, etc. This description will be what appears on the Resolution screen and on reports.

View Waste Reasons

From the Waste Reason listing page, you will be able to view a detailed listing, be able to add, edit, or delete waste reasons

Waste Reasons

See a complete listing of all waste reasons a detailed listing. You will be able to edit each waste reason.

► [View Waste Reason](#)

Waste is used when a product is taken out of the Solution but a portion or all must be wasted - such as dropping a medication, the patient unable to accept, or controlled drugs that are not used that have to be wasted. The Waste Reasons entered on the myQLink.net database will show up on the Solution when using the Change Dose/Waste Preselect feature. To Add a Waste Reason, click on the Add New Waste Reason. The Reason box is to number the Waste Reasons 1, 2, 3, etc. The Description box is used for the Waste Description. For example, patient unable to accept medication, controlled substance not used, bottle dropped, etc. The description is what will appear on the screen

Temporary Patient Reconciliation

From the Patient Reconciliation listing page, you will be able to find, match, and reconcile temporary patients created in the system.

Patient Reconciliation

See a complete listing of all patients in the system.

To reconcile Temporary Patients in order to match a Permanent Patient ID, select View Patient Reconciliation from the Database Menu Tab and select the Temporary Patient. The selected Patient will appear in a header at the top of the page. Search and select the Permanent Patient to be matched to. Once selected, the two patients will appear side by side for comparison. When ready to reconcile the two records together, select Match.

The Temporary Patient will now be merged and share the Permanent Patient ID. Any Profile items will be merged and, for reporting purposes, will be seen as one patient.

Database | Patients | Patient Reconciliation (20 patients)

Internal ID	Creation Date	Original Patient ID	Current Patient ID	Patient Name	DOB
19			435177	Jane Doe	3/1/1963
Click on Patient for the above patient to be matched to					
Internal ID	Creation Date	Original Patient ID	Current Patient ID	Patient Name	DOB
1			0002	Jack	
3			0002	Jack	
2			0003	Doug	
6			0004	JJ Still	
7			0005	Tommy Grimm	
10			0006	Jimmy	
9			00152	Fluffy	
5			004	Sam Jackson	
8			006	Jinny Waters	
12			007	April	
13			008	Tim	
16			009	Jimmy John	6/20/1966
11			0123	Frank	03/23/1999
20			030414	Phyllis Kim	3/1/1963
17	1/7/2014 2:54:24 PM	2224	2224	Brown, Charlie	

Database | Patients | Patient Reconciliation (patient 19)

Change this Patient.....	To be this Patient
Internal Record ID: 19 Patient ID: 435177 Patient Name: Jane Doe Temporary: <input checked="" type="checkbox"/> DOB: 3/1/1963 Active: <input checked="" type="checkbox"/> Sex: Female Weight: 112 Weight Units: lbs Height: 0 Height Units: Location: Rm 102 Patient Notes: Last Issue: Address1: Address2: City: State: Zip: Country: Driver's License Number: Client's Phone Number: Email: Allergies: pen	Internal Record ID: 20 Patient ID: 030414 Patient Name: Phyllis Kim Temporary: <input type="checkbox"/> DOB: 3/1/1963 Active: <input checked="" type="checkbox"/> Sex: F Weight: 112 Weight Units: lbs Height: 0 Height Units: Location: 102 Patient Notes: Last Issue: Address1: Address2: City: State: Zip: Country: Driver's License Number: Client's Phone Number: Email: Allergies: pen

Match



The Temporary Reconciliation process does not deactivate the Temporary Patient in the Database.

View Doctors

From the Doctors listing page, you will be able to view a detailed listing, be able to add, edit, or delete Doctors

Doctors
See a complete listing of all doctors in the Cubex. You will be able to edit each doctor, delete doctor and add new doctors.

▶ [View Doctors](#)

The Doctors are used when a Patient Profile is created. To create the Doctors, select Database and then Doctors from the sub-menu on the left. Select Add New Doctor in the top right or edit/copy in the lower right. Once a Doctor is created, it can be viewed and selected within the Patient's Profile in the .net.

View Patient Order Overview

From the Patient Order Overview listing page, you will be able to view a detailed listing of the active Patient Orders, # of Orders, # of Orders Complete and the # of Orders Remaining.

Patient Order Overview
See a complete listing of all patient orders in the system. You will be able to edit each patient order, delete order and add new orders.

▶ [View Patient Orders](#)

To view the Patient Order Overview, select Database and then Patient Overview from the sub-menu on the left. Select the Patient to view the Patient Item in more detail.

Transaction Menu

The Transaction Menu allows the user to view discrepancies, resolve discrepancies and view a complete history of all transactions

View Discrepancy

Allows the user to see a complete listing of all discrepancies within your database. From the discrepancy listing page you will be able reconcile the discrepancies.

Discrepancy Resolution

Resolving discrepancies is a process of discovering, adjusting, and fixing the unresolved discrepancy. Once resolved, the System Administrator has a permanent record in the "Resolved Discrepancy Report". Your resolved discrepancy will be archived in the System. This section will outline the best practice for resolving discrepancies.

During bin access, if a discrepancy is found, the original transaction is recorded intact with the initial value, less the amount for the transaction, then a separate Discrepancy (DI) transaction is recorded with the same time/Date stamp. This DI transaction list the missing amount as a discrepancy transaction, with a known user and patient (if applicable).

Once the discrepancy is detected, the shift supervisor or System Administrator should investigate the discrepancy and provide a resolution. The myQLink.net will provide the data: who, what, when, and where. The System Administrator finds the why. They will need to ask the users who had prior access to the bin and what happened. Most of the time, the patient's chart will divulge how the discrepancy occurred.

From the main menu, Select Transactions. Select View Discrepancy. The Discrepancy information will display any unresolved discrepancies (This list can be set to age off after a transaction has been listed for a given period of time. Please contact Customer Solutions to customize this setting). Select the transaction to resolve. The discrepancy resolution screen appears. Review the discrepancy, and the prior transactions. If the count in the bin was short of the expected count, ask the prior user and verify on the patient's chart the amount of medication administered. After the investigation has been completed, then a resolution reason may be documented with a witness. The System Administrator may assign reasons (Database > View Discrepancy Reason) to resolve discrepancies. In addition, the user may amplify the default reasons by free texting in the Written textbox

The final step in the Discrepancy Resolution is for the Resolver and a Witness to log in with their Solution User ID's & passwords.

Discrepancy Resolution

Item					
Description:	Multi 118mg/2mL 10mL Vial-S2-T				
Item Detailed Description:	Generic Multi 118 MG/ INJ 10 ML VIAL				
Item #:	SQA118				
Cabinet:	JTM				
Zone:	06				
Drawer:					
Bin:	06 08				
Container:	C118-33				
Schedule:	2				

Transactions	Prior Transactions		Discrepancy	Subsequent Transactions	
Type:	B	R	P	B	R
Date:	1/12/2013	1/12/2013	1/12/2013	1/12/2013	1/21/2013
Time:	9:17:29 AM	9:19:46 AM	9:20:13 AM	9:21:12 AM	9:23:34 PM
User:	Smith, Bob	Smith, Bob	Smith, Bob	Smith, Bob	Smith, Bob
ID:	1111	1111	1111	1111	1111
Witness:					
ID:					
Patient:	10pm Pomeranian	10pm Pomeranian		10pm Pomeranian	10pm Pomeranian
Patient ID:	TEMP524039	TEMP524039		TEMP524039	TEMP524039
Client:					
ID:	TEMP524039	TEMP524039		TEMP524039	TEMP524039

Transaction as recorded					
Computer On-Hand Count:	3.7 ML	-3.9 ML	-1.1 ML	10 ML	-2 ML
Count found:	0	7.6	10	10	0
Qty Returned/(Issued):	-3.7	1.3	0	-10	2
Discrepancy:	0	2.6	1.1	0	0
Count after Return/(Issue):	0	0	0	0	0
R = Resolved:					

Reason

Select: Count entered incorrectly

Written:

Reason

Select: Error in Countback

Written: Error in Countback
Incorrect in Prior Countback
Error in previous dose issued
Unexplained loss - See Report
CUBEX Data Resolution

Resolver ID:

Resolver Password:

Witness ID:


Witness Password:


Date: 9/9/2011
Time: 5:17:04 PM

► OK ► Cancel

The Discrepancy transaction is resolved by the Resolver and a Witness.

The item is now moved to the resolved discrepancy list in myQLink.net

 Schedule 2 Witness Employee Attribute must be flagged in their employee attributes to witness a resolved discrepancy.

 Non Solution Users may be chosen and set up to resolve discrepancies. See the Tool Menu section for more details

Auto Resolve for Container Items:

The Cabinet Software has an option to "Auto Resolve" discrepancies that fall under a set %. This percentage is per container and determined by the site. The way this will work is when a Container reaches zero on hand, the system will sum the discrepancies and if the summed amount falls under the percentage set, these discrepancies will be Auto Resolved. The Auto Resolved transactions can be located on the Resolved Discrepancy Report. Amounts over the set percent will need to be investigated and resolved manually as described in the steps above (see the *Cubex Solution Guide* for more details on setting the Software Options).

View History

History

See a complete listing of all transactions in the listing.

► [View History](#)

From the transactions listing page you will be able to view a detailed listing.

Transactions | History | Monthly Transaction Reports

Date

[September 2011](#)
[August 2011](#)
[July 2011](#)
[June 2011](#)
[May 2011](#)
[April 2011](#)
[March 2011](#)
[February 2011](#)
[January 2011](#)

Transactions

Number of transactions recorded: **871**
 Number of transactions recorded: **3067**
 Number of transactions recorded: **2766**
 Number of transactions recorded: **2608**
 Number of transactions recorded: **2617**
 Number of transactions recorded: **3267**
 Number of transactions recorded: **3948**
 Number of transactions recorded: **322**
 Number of transactions recorded: **0**

Archive: [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

Transactions | History | Transactions - September 2011

Date ▼	Time	Cabinet	Bin	Type	Item Description	Dose	Qty	Employee
9/9/2011	5:25:37 PM	02	83 7F	B	BUTORPHENOL INJ 10MG/ML	-0.11 ML	-1 ML	02
9/9/2011	5:15:10 PM	01	0C 1F	B	DOXYCYCLINE TABS 100MG	-20 TAB	-20 TAB	16
9/9/2011	5:10:19 PM	02	01 22	B	WHITE TAPE 1IN	-1	-1 ROLL	31
9/9/2011	5:09:47 PM	02	00 0C	B	VET WRAP 2"	-2	-2 ROLL	31
9/9/2011	5:09:45 PM	02	07 17	B	CONFORM GAUZE 3IN	-2	-2 ROLL	31
9/9/2011	5:09:11 PM	02	07 1D	B	CAST PADDING 3in	-2 ROLL	-2 ROLL	31
9/9/2011	5:02:34 PM	01	00 11	B	METOCLOPRAMIDE ORAL SUSP	-1 OZ	-1 OZ	16
9/9/2011	5:02:09 PM	01	00 17	B	EPI OTIC EAR WASH 8oz	-1 BOTTLE	-1 BOTTLE	16
9/9/2011	4:40:08 PM	01	0C 1F	B	DOXYCYCLINE TABS 100MG	-30 TAB	-30 TAB	16
9/9/2011	4:39:35 PM	02	04 2A	B	IV CATH INSYTE 22G BD	-2	-2 EACH	31
9/9/2011	4:35:04 PM	01	00 16	B	CONOFITE	-7.5 ML	-8 ML	02
9/9/2011	4:33:45 PM	01	00 0F	B	TRIZULTRA PLUS KETO 4OZ	-1 BOTTLE	-1 BOTTLE	02
9/9/2011	4:32:05 PM	02	04 2F	B	IV CATH CAP T-PORT	-1	-1 EACH	31
9/9/2011	4:31:34 PM	02	04 06 36	B	IV CATH CAP LOCK INJ	-1	-1 EACH	31
9/9/2011	4:30:06 PM	01	00 09	B	FUROSIMIDE ORAL SOLN 10MG/ML	-1 BOTTLE	-1 BOTTLE	08

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 29 30 44 45 58

◀ Previous |

Transactions | History | Transaction : 19491

Transaction #: 19491	Type: B
Date: 9/9/2011	Time: 5:25:37 PM
Cabinet: 02	Bin: 83 7F
Item: 1TORB0	Type: Medication
Description: BUTORPHENOL INJ 10MG/ML TORB INJ	
Consignment Qty Issued: 0 ML	On-Hand Qty Issued: -1 ML
Issue Dose: -0.11 ML	Waste: 0 ML
Issue Cost: \$3.2624	Unit Price: \$3.2624
Unit Cost: \$3.2624	Employee #: 02 Jess Tracy
Department: DR	Patient: temp pt temp pt
Case:	Supplier: MWI
PO#:	External PO#:
Restock#:	Lot:
Package Qty: 1	Packing Slip:
Current Consignment 0 ML	Current OnHand: 82 ML
Server Date/Time: 9/9/2011 5:26:30 PM	Vendor Item: 017669
Comment:	Computer Name: TREATMENT

Purchasing Menu

The Purchasing Menu manages the database Suppliers and Purchase Orders. Here, Automatic Purchase Orders (Auto PO) can be customized, edited, or deleted.

View Suppliers

Suppliers

See a complete listing of all suppliers in the : will be able to edit each supplier, delete sup

From the suppliers listing page you will be able to view a detailed listing. You will be able to add, edit, or delete suppliers

► [View Suppliers](#)

To Add a New Supplier

To setup a new Supplier, select Purchasing from the main menu bar. Select Add New Supplier on the top right of the screen.

The required fields to fill in are Supplier and Name. Supplier is limited to 12 characters (no spaces). Name is limited to 30 characters. The **E-mail** box is used for Automatic Reports, if you would like the supplier to receive automatic reports, enter their e-mail in this box. If you would like to receive Automatic Reports, add yourself as a Supplier and fill in the email text box.

Add more than one e-mail address by separating each address with a semi-colon and NO SPACE between the semi-colon and following e-mail addresses. It is recommended to include the System Administrator's e-mail address to confirm transmission.

The **P.O. E-mail** box is used for the Automatic Purchase Order process. The entries in this box will receive the Purchase Orders when they are scheduled below. Add more than one e-mail address by separating each address with a semi-colon and NO SPACE between the semi-colon and following e-mail addresses.

If the PO is required to be reviewed and approved, check the box for **Approval Required** and the email address of the approver. The approver must review the PO and select Apply before it can be sent to the PO email.

The **Critical E-Mail** is used for an item that is setup for Critical Level Reporting. To set up an item for Critical reporting, go to Cabinets > Bins > select the item > click Edit > check the box Email if Bin at Critical > click Save. When the Critical Level reporting is set up, the system will send an e-mail every hour until the item has reached its Max level. Critical level is defaulted to one and inactive until enabled.

Purchase Orders

Use Custom PO Report: ☒
 Custom PO FileName:
 Auto PO: ☒
 Time:
 ERP:
 Use Order Qty: ☒
 Day: Sun ☐ Mon ☐ Tues ☐ Wed ☐ Thur ☐ Fri ☐ Sat ☐
 Tag Labels: ☐
 Default Supplier Item:
 PO Aging Days:
 Delete Aged POs: ☐
 Email: ☒ File Type:
 cXML: ☐
 Host:
 Auth:
 Sender ID:
 Shared Secret:
 CustomerID:
 ReceiverID:
 Language Type:
 Currency Type:

Port:
 User:
 PW:

Automatic Purchase Order Set Up

Verify the following for each Supplier:

- ☒ Custom PO Reports box is checked.
- ☒ "PORReport.rpt"(case sensitive) text in the Custom PO File Name field
- ☒ Auto PO box is checked
- ☒ **Select the time you wish to receive the e-mail** (avoid 12:00am PST)Defaulted to 4:00am
- ☒ Use order Qty box is checked
- ☒ **Select the day(s) you wish to generate the PO** E-mail box is checked for format
- ☒ Rich Text Format is selected for File Type
- ☒ Select Save

Set up any other way will cause the PO to fail

PO Aging Days

PO Aging Days allows the System Admin to set the days the PO remain open. Once the time entered has passed, the POs are deleted. For example, if set to 7 days, the POs generated 7 days ago will be deleted. To be used in combination with **Delete Aged POs**.

View Purchase Orders

Purchase Orders

See a complete listing of all purchase orders in the detailed listing. You will be able to create and edit p

► [View Purchase Orders](#)

From the purchase orders listing page you will be able to view a detailed listing. You will be able to create and edit purchase orders, create scheduled restock, and receive items

Generate Manual Purchase Order

Purchasing | Purchase Orders | New PO PO: 1032W External PO: _____

Cabinet: All Supplier: Substitute: Method: At/Below Min

Cabinet Bin Item Description Max Min InStock OnOrder OrderQty Req. Purchase Due Date

To manually generate a PO, Select View Purchase Orders, click the magnifying glass to the right of the Supplier box. This will bring up the list of Suppliers in your database, select the Supplier. In the **Method** box select At/Below Min, click Go. This will generate a PO for the selected Supplier.

☒ Use Order Qty ► [Spot Buy](#)

Click **Purchase All**. this will fill in the Purchase box for all items. Review the items and verify the quantities that need to be ordered. If you need to make a change to an item quantity, click on the box and type in the correct amount to order. Once all the changes are made, click **Apply**. A pop-up box will appear with the total dollar amount for the PO. Click Yes. The Header script box for the PO Header Confirmation will open. This is for the shipping address of the PO. If this does not need to be modified, click No. The Send PO Confirmation script box appears last, Send PO to Supplier. If you would like this PO to go to the Supplier email click Yes. This will send the PO to the e-mail address(s) listed in the P.O. E-Mail under the Supplier Set Up screen.

For a Consolidated Cabinet, simply select Consolidated New PO on the left side of the screen. Follow the same above steps

Edit a Purchase Order

To edit an existing PO click on the Edit PO option on the left of the screen. Click on the magnifying glass to the right of the PO box. This will bring up the list of all open PO's. Click on the appropriate PO then click Go. The PO will open and show all items under that PO that need to be ordered.

Purchasing | Purchase Orders | Edit PO (select PO)

Supplier: Name: PO:

Cabinet Bin Item Description Max Min In Stock On Order Revise Due Date

PO Lookup - Windows In...
 https://www.mycubex.net/dlgPoN
PO Look Up (show all)
 search for:
 PO 1031W External PO
 1030W
 1029W
 1027W
 1026W

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If a Supplier Order Interface is enabled, make changes directly on the supplier website.

There are PO options on the bottom right side of the screen to Edit PO's.

To delete an entire PO click on the **Delete PO** option on the bottom right side of the screen. This will delete the PO from the System.

To revise quantities click the **Revise** box to the right of the item and change the quantity, complete this for all items that need to be changed. Once all items have been updated, click on the **Apply** option on the bottom right of the screen. The three script boxes will appear, Update PO now, click Yes, Change PO header, click No, Send PO to Supplier, click Yes.

Purchasing | Purchase Orders | Edit PO (# 1029W)

Supplier: MWI Name: MWI PO: 1029W

Cabinet	Bin	Item Description	Max	Min	In Stock	On Order	Revise	Due Date
01	00 17	IV LINE PRIMARY HOSPIRA	75	25	85	0	0	10/3/2011
01	01 0F 78	T PORT	75	40	59	0	0	10/4/2011
01	01 21	CATHETER CV DL 7FRX20CM <input type="button" value="⬇"/>	6	4	3	3	<input type="text" value="3"/>	10/3/2011 <input type="button" value="⬇"/>
01	01 23	CATHETER CV DL 4FRX13CM <input type="button" value="⬇"/>	6	4	2	2	<input type="text" value="2"/>	10/3/2011 <input type="button" value="⬇"/>
01	04 1B	SNAP PARVOVIRUS ANTIGEN TEST KIT	10	5	10	0	0	10/3/2011
01	05 04	Chem15	24	12	12	0	0	10/3/2011
01	05 05	Chem10	12	6	9	0	0	10/4/2011
01	05 06	Lyte4	48	24	46	0	0	10/4/2011
01	06 1F	F AIR ANESTHESIA CANISTER	6	3	6	0	0	10/4/2011
01	07 05	CATHETER RED RUBBER FEEDING 8FRX16 <input type="button" value="⬇"/>	6	3	9	4	<input type="text" value="4"/>	10/4/2011 <input type="button" value="⬇"/>
02	02 21	NUTRI-CAL PASTE	4	2	4	0	0	10/3/2011
02	03 08	ENROFLOXICIN INJ 22.7MG/ML 20ML	100	40	142	0	0	10/3/2011
02	04 0F 79	COSYNTROPIN .25MG VIAL	2	1	2	0	0	10/4/2011

[Delete PO](#)
[Apply](#)
[Send Quote](#)
[Spot Buy](#)
[Add Item](#)
[Delete Item](#)
[Add Note](#)

Add Item vs Spot Buy

If a Supplier Order Interface is enabled, make changes directly on the supplier website

Add Item: To add items (that are already assigned to a Solution) to a PO, select the Add Item option on the bottom right of the screen. The Item Look Up box for the Supplier will open. Search for the item to add to the PO, Select the item. This will add the item to the PO, click on the revise box and enter the quantity to be ordered, click Apply. If more items need to be added, click on the Add Item option and repeat the steps. Once all items have been added, select the Apply option on the bottom right side of the screen. The three script boxes will appear, Update PO now, click Yes, Change PO header, click No, Send PO to Supplier, click Yes. These items will be added to the scheduled PO restock list.

Spot Buy: "Spot Buy" is used to add items, either assigned to a bin location or not, to an existing PO. These items will be received as a Supplemental Restock. Spot Buy Items will not show as "on order". It is recommended to use "Add Item" when possible.

If you have item(s) that need to be deleted from the PO check the box to the right of the item. Then click on Delete Item option on the bottom right of the screen, and then click Apply.

Items that have changed bin locations within the Solution from the time the PO was created to the time the PO is received will need to be Supplementally Restocked. The user will be informed of this by a pop up box at the time of restocking the Scheduled PO.

Reports

Reports

Crystal Report ActiveX Viewer required. [Download Now.](#)

Standard Reports

See a complete listing of all standard reports in the Cubex Solutions (Tempe) database. From the report listing page you will be able to view a detailed report.

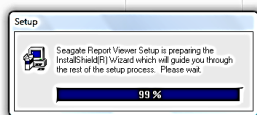
► [View Standard Reports](#)

Automatic Reports

See a complete listing of all automatic reports in the Cubex Solutions (Tempe) database. From the report listing page you will be able to view a detailed report.

► [View Automatic Reports](#)

Name	Type	Compressed size
npviewer	Application	4,705 KB



Downloading Crystal Reports

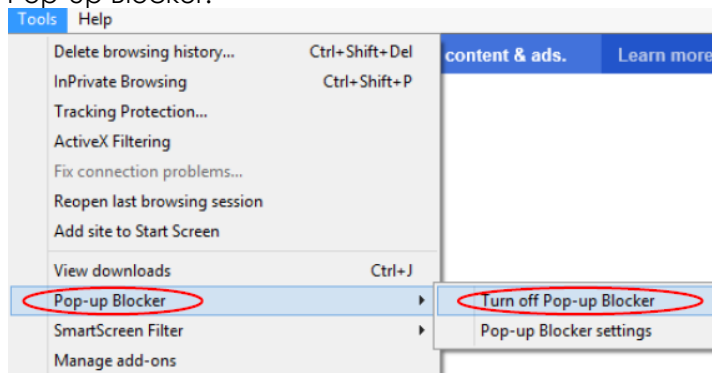
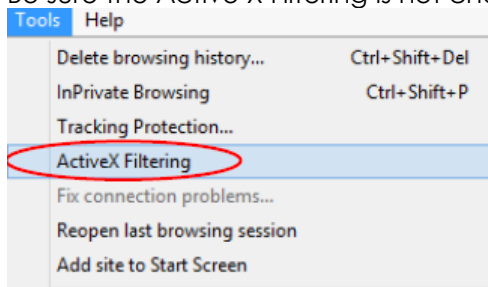
To view reports, you must first Download Crystal Reports. Log in to myQLink.net. Select the Reports Menu. Select Download Now. Save the file. Select OK. Open the Download and Save to your desktop. Open the Application – npviewer. Follow the Setup Wizard by selecting Next and Finish when prompted. Select any Report. Select Preview and Print. You will see a pop-up blocker on the top tool bar. Select “allow all websites” – repeat this for each of the three pop up messages.

Prepare your computer before downloading Crystal Report Active X Viewer from the myQLink.net site. Open Internet Explorer and follow these steps.

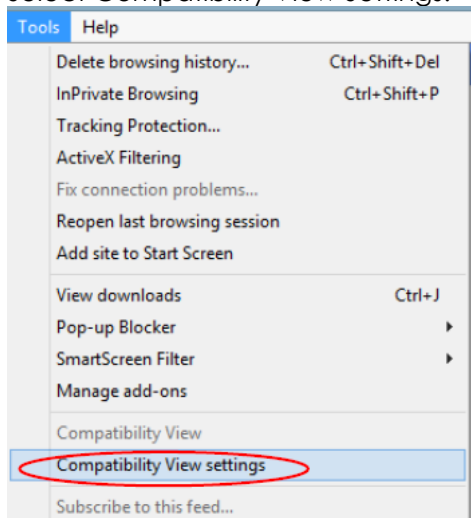
If you do not currently have a menu bar displayed, right click your mouse in the top bar away from the web address window. Select Menu Bar.

The Menu Bar will appear. Select Tools.

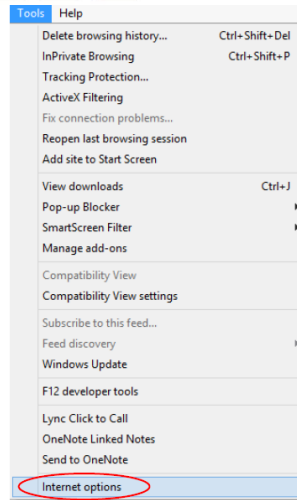
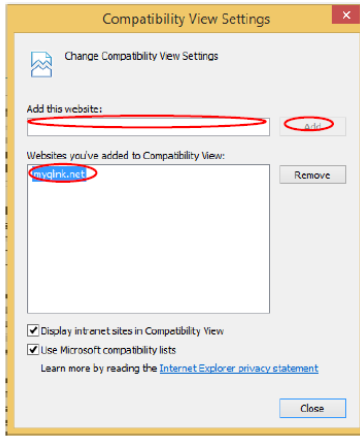
Be sure the Active X Filtering is not checked and Turn off Pop-Up Blocker.



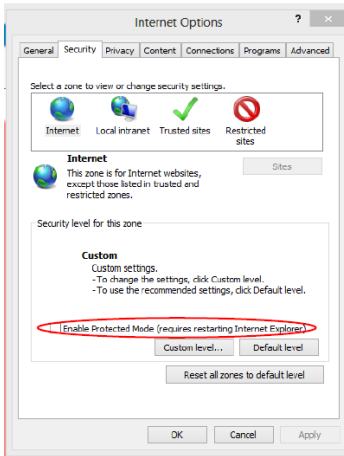
Select Compatibility View Settings.



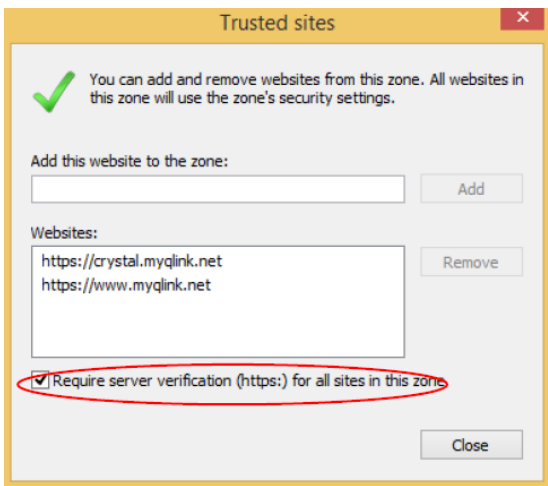
Insert myQLink.net into Compatibility View window by typing it into the Add this website field and selecting Add if it is not currently listed. Select Internet Options.



Select Security. Enable Protected Mode should not be checked.



Continuing in the Security Tab, select Sites to open the Trusted Sites window. Add these websites to your Trusted Sites and check Require server verification (https:) for all sites in this zone.



Now you are ready to logon to myQlink.net, select Reports, and download Crystal Report Active X Viewer.

View Standard Reports

Standard Reports

See a complete listing of all standard reports

► View Standard Reports

Reports | Standard | Report (Cubex - Inventory on Hand)

Report Category: **Cubex**

Report Description

- C50, Top 80% Spend Report
- C54, Top 10 Items by On-Hand Value
- C55, Purchase Order Distribution
- Consumption Cost by Department
- Consumption Cost by Dispensing Location
- Controlled Substance Admin Log
- Discrepancies - Resolved
- Discrepancies - Unresolved
- Inventory on Hand**
- Item Download-Database Change
- Open Purchase Orders By Item
- Open Purchase Orders By Supplier
- Purchase Orders
- Stockout Projections Report
- Top 10 Items by Consumption
- Transactions by Cabinet by Schedule 2
- Transactions by Cabinet by Type
- Transactions by Patient
- Weekly Consumption Cost Trends

No Date Selection

Cabinet Selection

From: To:

Item Selection

From: To:

From the report listing page you will be able to view detailed reports. For more detailed information on each report, see the separate "Reports Guides"

Select the Report Category, then click Go. Select the desired report by clicking it. It is selected when it appears bold.

Set the report parameters on the right, then select Preview/Print.

The selected report can also be emailed by selecting email and selecting a supplier or entering the address the report is to be sent.

View Automatic Reports

Automatic Reports

See a complete listing of all automatic reports

► View Automatic Reports

Reports | Automatic | Report (Transactions - Discrepancies/User Report, C35)

Report Category: **Transactions**

Report Description

	Daily	Weekly	Monthly	Day(s)	Email
Discrepancies/User Report, C35	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discrepancy Summary, C43	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transaction Skip Report, C58	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by Cabinet by Type, C6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by Charge Dept, C4b	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by Employee, C15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by Patient, C14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by User Dept and Item, C4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions by User Dept and Item, C4e	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions Summary by Item, C47	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions, Complete Export, C51	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions, Condensed Export, C51b	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions, Condensed Patient Export, C51c	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions, Qbud Items, C34	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transactions, Qbud Items, Summary C34s	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Schedule

Time:

Day: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Date:

Parameters

Date Selection

Date Range:

Note: Maximum Date Range is 92 days

Cabinet Selection

From: To:

Item Selection

From: To:

Prior to Setting up Automatic Reports, add the facility as a Supplier (Purchasing Menu > View Suppliers > Add New Supplier) including adding System Administrator's email in the E-Mail box.

You can select specific reports to be automatically generated and sent to a specified email at regular intervals within Automatic Reports.

Select the Report Category, then click Go. Select the desired report by clicking it. It is selected when it appears bold. Check the box for at what interval you wish the report to be generated and sent – Daily, Weekly, or Monthly. Select e-mail for the method to be sent.

This will bring up a list of "Suppliers". Select the File type to be XLS for Excel format. Check the Facility box under Supplier, then select Add. This will add the e-mail addresses to the right. Click the blue box to close the screen. Define the parameters for that specific report on the right and click Update Report

For more detailed information on Reports, See the separate "Reports Guide".

Discrepancies/User Report, C35

Supplier

Acinet	<input type="checkbox"/>
Amaltheon	<input type="checkbox"/>
Bader	<input type="checkbox"/>
Bilr Schn	<input type="checkbox"/>
Conmed	<input type="checkbox"/>
ControlledRc	<input type="checkbox"/>
Imex	<input type="checkbox"/>
ME	<input type="checkbox"/>
MWI	<input type="checkbox"/>
Novartis	<input type="checkbox"/>
SC	<input type="checkbox"/>
SynthesVel	<input type="checkbox"/>
WAREHOUSE	<input type="checkbox"/>

E-mail Address

LB brown@cube-system.com ☐

File Type

☐ PDF ☐ TXT ☐ RPT ☒ XLS ☐ RTF ☐ DOC

Exporting Reports

Preview | Export Report

LB

Cab	CabName	Bin	Item	Description	Alternate	Notes
2.7MM x 35MM C	LB Demo Cabinet 01 01	SS001072	2.7MM x 35MM C	Controlled Substance Admin Log	newest-fapping	4/26/13
2.7MM x 39MM C	LB Demo Cabinet 01 02	SS001073	2.7MM x 39MM C	Controlled Substance Admin Log	newest-fapping	4/26/13
2.7MM x 40MM C	LB Demo Cabinet 01 03	SS001074	2.7MM x 40MM C	Controlled Substance Admin Log	newest-fapping	4/26/13
Blood Admin Set	LB Demo Cabinet 01 04	10035	Blood Admin Set	Controlled Substance Admin Log	newest-fapping	4/26/13
Butterfly cath 19g	LB Demo Cabinet 01 05	10037	Butterfly cath 19g	Controlled Substance Admin Log	newest-fapping	4/26/13

Reports, once opened in Crystal Reports, can be exported and saved to the file type of choice. Select the envelope with the red arrow from the top left corner. Select the location to save in, then name the report. Select the file type then select Save.

Reports ending in "e" are easily exported into Excel with very little formatting efforts.

Reports ending in "cc" are reports that will pull the current batch costs for items on that report

Transactions Types

Note: The convention is that an Issue is a negative number (i.e. stock is being reduced), restock is positive, and a negative discrepancy means you found less than the computer shows on hand (so you had effectively an issue that was unaccounted for)

S	Restock, Scheduled or Supplemental	Positive. Always integer Units of Issue. May be as a result of, assigning an item. Or a Supplemental restock. Or a schedule restock
DI	Discrepancy	Recorded whenever a difference is found between what the computer thinks is on-hand, and what the user enters as on-hand. This difference is noted in the transaction (issue, Return, Cycle Count) where the Cycle Count or Countback is made, but the correction is not done in that transaction, but in a subsequent DI transaction (q.v.). This can occur during a cycle count or Countback, or if the user modifies the on-hand value during restock or issue/return because they realize that the computer's count is wrong. This is an on-the-fly cycle count
DS	Destock	Shows quantity destocked from a bin or button location when un-assigning
EB	Exit before witness	Not currently used. If you see "I" there is a system problem. Please report
I	Consignment Issue	Not currently used. If you see "I" there is a system problem. Please report
N	Null transaction	Only applies to "Touch to Take" zones. Recorded if a user access the Solution but doesn't push any button
P	Cycle Count	A P transaction is recorded every time a bin is accessed or a button is pushed in the cycle count mode, regardless of whether a new count is made and regardless if there is a discrepancy. If there is a discrepancy a DI transaction will follow and make a "Mystery Issue/Return" to balance up the books
PE	A Purchase Order line is edited	This shows every time an item is edited on a PO. Most significantly, if a restock list still has un-stocked items on it, and the restock PO is cancelled at the Solution, a PE transaction is recorded for each item. We have a future feature to use another field to record and report on these quantities
PO	A new Purchase Order is created.	Currently this is recorded for each item ordered, but we do not show the quantity. The quantities should not be in the issue return field, since the item has not yet been stocked. We have a future feature to use another field to record and report on these quantities
R	Item Return	Positive numbers. May be integer or decimal depending on the item type
SK	Skip transaction	User preselected then when they have access to the item, bin lid open or door open, they decide to cancel the transaction. Records the drug they were accessing and the user
T	Stock Transfer in Modify bin	Positive quantity.
W	Dose/Waste correction transaction	Records any changes in that are entered in the Dose waste screen

Tools Menu

Adding System Administrators to myQLink.net

[Add New User](#)

Tools | Security | Add New User (* required)

User: * @cubexsolutions_tempe

Password: *

Confirm Password: *

Level: *

Supplier:

First Name: *

Last Name: *

Address:

City:

State:

Zip:

Country:

Phone:

Email:

Dashboard: ☒

Permit Exit: ☒

[Save](#)
[Cancel](#)

To add a myQLink.net Administrator, the user must have Administrators rights themselves. A user may only add a user with rights equal-to or less-than their user rights.

From the main menu bar, select Tools. From the Tools sub menu, select View Security. Select Add New User in the upper right. User ID's must be unique. Add the user information noting the fields with red asterisks are required. Select the Administrator Level from the drop down menu. Note the default is xx@sitename_location.

Select the Save button in the lower right.

Adding Read Only Users to myQLink.net

Tools | Security | Add New User (* required)

User: * @cubexsolutions_tempe

Password: *

Confirm Password: *

Level: * ☐ Discrepancy Resolver ☒ Add Patient

Supplier:

First Name: *

Last Name: *

Address:

City:

State:

Zip:

Country:

Phone:

Email:

Dashboard: ☒

Permit Exit: ☒

[Save](#)
[Cancel](#)

Log in to myQLink.net with System Administrator permissions and navigate to the Main Menu Bar. Select Tools. Select View Security. In the upper right corner, select Add New User. Enter the employee information. The red asterisk denotes required field, User ID's must be unique. Leave the default level of Read Only. Select Save. Select Employee again and select Edit. Check the Add Patient box or Discrepancy Resolver if Applicable. In the lower right of the screen, select Save.



Note: When a User is added as Read/Only and the Add Patient box is checked, the user will only have the ability to Add, Edit, or Delete patients, or run reports

Printing Bin Labels

Bin Labels

See a complete listing of all bin labels in the system. You will be able to create bin labels and many more.

► [View Bin Labels](#)



Important: Items must be assigned to the cabinet in order to print their labels

Log in with System Administrator privileges. From the Main Menu Bar, Select Tools then View Bin Labels. Select Cubex, Cubex by bin, or Cubex Alpha as the Style from the drop down menu.

Tools | Bin Labels | Create Labels

Cabinet	Description	Enabled	Start Location	Style
01	PHARMACY1	✓	1 2 3 4	Cubex
02	TREATMENT	✓	5 6 7 8	
			9 10 11 12	
			13 14 15 16	
			17 18 19 20	
			21 22 23 24	
			25 26 27 28	
			29 30 31 32	
			33 34 35 36	
			37 38 39 40	
			41 42 43 44	
			45 46 47 48	
			49 50 51 52	
			53 54 55 56	
			57 58 59 60	
			61 62 63 64	
			65 66 67 68	
			69 70 71 72	
			73 74 75 76	
			77 78 79 80	

Bin	Item Description	QTY	
02	00 08	1	<input type="checkbox"/>
02	00 0B	1	<input type="checkbox"/>
02	00 0D	1	<input type="checkbox"/>
02	00 0F	1	<input type="checkbox"/>
02	01 00	1	<input type="checkbox"/>

Page 1 of 22 ► Insert ► Update ► Delete

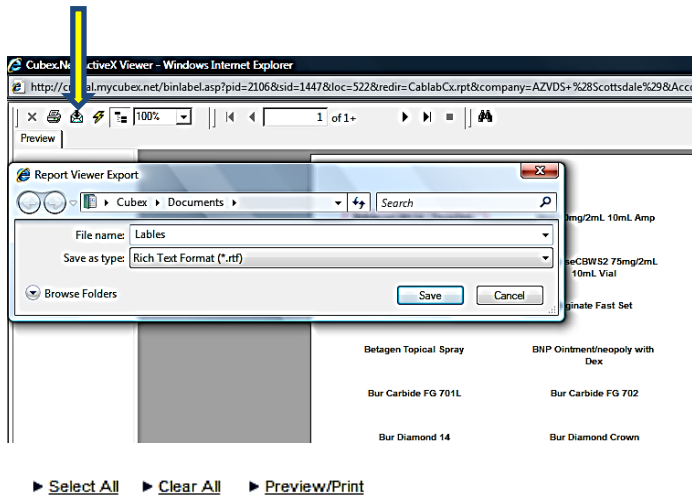
Select the Solution you wish to print labels for. When selected, it will show as bold. Select All located on the bottom of the screen. the message "All bins selected for this cabinet." will appear in red in the middle section.

(To print a select few labels, Select the Solution name where the item(s) are located. Select the item(s) by checking the box next to the description. Select Insert. The selected items will be removed from the middle section and brought down to the bottom section and are ready for printing. Select Preview/Print

The labels can also be exported by selecting the envelope icon at the top menu bar. Export in Word or Rich Text Format.

Print one page to ensure alignment.

(Use Avery Clear Easy Peel Labels #5667 or equivalent)



► [Select All](#) ► [Clear All](#) ► [Preview/Print](#)

Appendix A - Managing Controlled Substances

The Solutions and associated software provide options to track, witness, and document discrepancy resolution for all functions related to the flow of controlled substances in and out of the Solution, as well as recording waste and adjustments to dose/waste of items removed. Controlled substance storage consists of individually locked bins to securely house each controlled substance.

Solution Settings: The Solution software includes certain settings which are recommended for controlled drugs. These include the default "Doctor Required" which requires the user to select the ordering doctor when issuing items. The Doctors will have to be set up on myQLink.net database and flagged as attending doctor
(See Cabinet Defaults in the "Solution Guide")

Assigning Controlled Drugs: Each drug assignment will include setting levels for the maximum, minimum, critical levels and the on hand amount of the drug in the bin. This determines re-ordering.
(See Assign Items in the "Solution Guide")

Waste/Change Dose: Any unused portion of the issued amount from a multi-dose container will need to be separately recorded as waste to account for 100% of the contents taken. The item must be flagged as a multi dose in the item attributes.
(See Change Dose/Waste Pre-Select in the "Solution Guide")

Item Attributes: Each item can be set up to require a witness ID and password for the following actions: Stocking/assignment, Issue/Return, Dose/waste recording, and Cycle Count.
(See Item Attributes in this "MyQLink.net Guide")

Countback: Either a verification of the displayed system count or a blind count. A difference between the user's count and the computer count is recorded as a discrepancy
(See Item Attributes in this "MyQLink.net Guide")

Restocking: When a shipment of a controlled drug is received, the practice will continue to keep on file the relevant records as required by the DEA such as invoices, shipping records, PO, and Form 222. The practice will continue to create unique container numbers. When stocking and restocking bins, the individual container number, Lot # and Expiration date should be entered. The container number on restock should be checked under item attributes
(See Item Attributes in this "MyQLink.net Guide")

Container Number: The container number should be entered on issues as well as at the time of restocking. This must be used in order to utilize the Lot Number and Expiration Date feature
(See Item Attributes in this "MyQLink.net Guide")

Lot Number When restocking and issuing controlled substances, you can enter/verify the Lot number for recordkeeping
(See Item Attributes in this "MyQLink.net Guide")

Expiration Date: As with Container and Lot number, when restocking and issuing controlled substances, you can enter/verify the Lot number for recordkeeping
(See Item Attributes in this "MyQLink.net Guide")

Cycle Count: The software provides the ability to perform "cycle counts" to verify inventory currently on-hand and to generate discrepancy reports for investigation of any differences found between the system vs. manual counts. Cycle counts and discrepancy reports should be run on a regular frequency (e.g. daily at the same time each workday or end of shift) to identify any issues timely. Recent transactions data and patient records usually enable identification of any discrepancies. Correction of discrepancies and the reasons for these are then recorded in the database and noted on the "Resolved Discrepancies Report".
(See Cycle Count Items in the "Solution Guide")

Employee Attributes: Each Employee can be set up to be authorized for any of the following actions: Witness,

Cycle count, Issue/Return, Stock, or Admin (which allows all access)
(See [User Permissions](#) under Employees in this "MyQLink.net Guide")

Purchase Orders: The System creates automatic purchase orders (PO) for drugs and supplies when they reach their pre-set minimum levels. The System Administrator at the practice has the option to have orders go directly to the Supplier, or, to receive email alerts that a drug needs to be ordered. For DEA Schedule II drugs which require completion of Form 222, the later method can be used to trigger the need to re-order. A "Lead Time" can also be set as part of an item's attributes; this is the amount of time that a drug takes to be submitted, processed and delivered by the supplier. (See [Item Attributes](#) in this "MyQLink.net Guide")

Reports: Various reports are available through myQLink.net. For controlled drugs, these include the following specific reports:

- Controlled Substances Administration Log
- Discrepancies – Unresolved
- Discrepancies – Resolved
- Transactions by Cabinet by Sched 2 (all controlled drugs)
- Controlled Substances Cycle Count Sheet – this report is in development
- In addition, Transactions by Patient can also be run.

These reports can be set up to generate automatically on a regular schedule and emailed to the Administrator or other designee.

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