

# Administration Tool Multiple Formularies

### Overview

- ◆ Version 3.0.0 and newer software for Codonics Safe Label System® (SLS) Administration Tool (AT) includes support for multiple formularies.
- ◆ Since the initial release of the Administration Tool (AT), some customers have had the need to maintain different formularies with a different set of drugs for different areas of the hospital. For example, the formulary loaded on an SLS in the pediatric operating room may have different drugs or drug configurations than the nursing floors.

### Changes to Configure Locale

- ◆ The Configure Locale dialog of the AT includes formulary settings that apply both to MDD and Formulary Drug options.
- ◆ The following settings are preserved on a per-formulary basis:
  - ◆ Active Template Pack
  - ◆ Prepared By Field
- ◆ The following settings are applied globally:
  - ◆ Active Localization Pack
  - ◆ Date Display Format
  - ◆ Database Mode
  - ◆ CID Length
  - ◆ Barcode Parsing Settings
  - ◆ Convert Code 39 barcodes to Code 32 barcodes

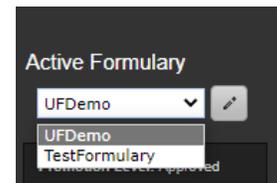
**NOTE:** The Users and Devices tabs remain as globally applied.

### Changes to Formulary Tab

#### Changes to Active Formulary Selection

**NOTE:** All active formularies share the same Master Drug Database (MDD).

- ◆ A new Active Formulary selection drop-down is included at the bottom of the Formulary page which allows the user to specify the current Active Formulary they are reviewing or updating.



**NOTE:** The initial formulary is named Default but can be renamed (e.g., UFDemo) or deleted by the user.

- ◆ To add a new formulary, edit existing formulary names, or delete existing formularies, select the edit (i.e., the pencil icon).



- ◆ A new interface, Edit Formularies, is displayed.

Formulary Name	Drug Count	Promotion Level	Actions
UFDemo	12620	Approved	Copy Delete
TestFormulary	375	Under Development	Copy Delete

Automatically switch with Active Configuration

Add Formulary

Cancel Save

**NOTE:** The following information is provided about each formulary:

- a. Formulary Name (editable)
- b. Drug Count (read-only)
- c. Promotion Level (read-only)

- You can then Copy an existing Formulary and provide a new name (e.g., Nursing Floor).

**NOTE:** Formulary names can only be alphanumeric characters just like in current SLS software.

- Or, you can Add Formulary and create a new formulary from the beginning.

- Or, you can Delete a formulary.

**NOTE:** A formulary can only be deleted if there are two (2) or more formularies. At least one formulary must always exist.

In order to prevent loss of data, formularies can only be deleted if they do not contain drugs.

- When checked, the Automatically switch with Active Configuration means changing the Active Formulary automatically changes the Active Configuration as well, and vice versa.

**NOTE:** This setting requires that a Configuration exists with the same name as the Formulary.

- If a configuration profile with the same name does not exist, automatic switching will not occur.
- This setting will be **enabled** by default.
- Enabling this setting will also enable the equivalent Automatically switch with Active Formulary setting in the Edit Configurations dialog.

## Changes to Master Drug Database

### Changes to adding and editing drugs in the MDD

- When adding or editing a new drug to the Master Drug Database (MDD), a new checkbox titled Add or Remove in Other Formularies is now present.

**NOTE:** This option does not appear if there is a single formulary.

- ◆ If Add or Remove in Other Formularies is checked, a new dialog appears when Save or Save and Verify the drug is selected. This allows the user to specify which formularies the new drug is added to:

**NOTE:** If the Add to Formulary checkbox is also checked, the current active formulary is automatically selected and disabled to prevent conflicting options in the Add or Remove in Other Formularies dialog. If it is not checked, it is still possible to select the active formulary when Add or Remove in Other Formularies is displayed.

- ◆ If the drug already exists in one or more formularies, those formularies are checked in the resulting Add or Remove in Other Formularies dialog. If the user unchecks a formulary, the drug is Removed from that formulary.
- ◆ Refer to the Administration Tool User's Manual (Codonics Part Number 905-063-xxx) for instructions on updating drugs in your Formulary.

### Changes to MDD Copying

- ◆ When copying or creating a drug in the MDD, a new checkbox titled Add to Other Formularies is now present.

**NOTE:** This option does not appear if there is only a single formulary.

- ◆ If Add to Other Formularies is checked, a new dialog appears when Create or Create and Verify the drug is

selected. This allows the user to specify which

formularies the new drug is added to:

**NOTE:** If the Add to Formulary check box is also checked, the current active formulary will be automatically selected and disabled to prevent conflicting options in the Add or Remove in Other Formularies dialog. If it is not checked, it is still possible to select the active formulary when Add or Remove in Other Formularies is displayed.

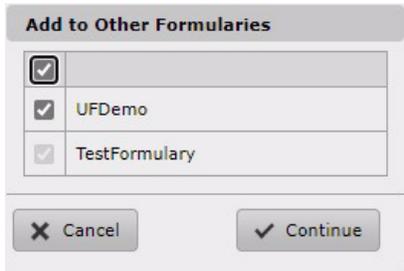
- ◆ If Copy Formulary Settings and Add to Other Formularies

are both checked, user edits in the resulting Copying

Master Drug - Editing Copied Formulary Drug applies to

the other formularies selected.

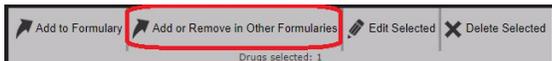
- ◆ If Add to Other Formularies is checked, a new dialog appears when Create or Create and Verify the drug is selected. This allows the user to specify which formularies the new drug is added to:



**NOTE:** If Copy Formulary Settings is checked, the source formulary will be checked (and disabled) in the resulting Add to Other Formularies dialog.

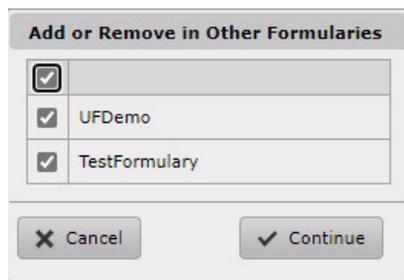
### Changes to drug selection popup

- ◆ When a drug is selected for editing, the drug selection popup is shown in the MDD section. A new option titled Add or Remove in Other Formularies is present.



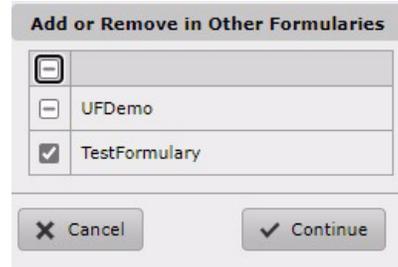
**NOTE:** The Add or Remove in Other Formularies will not appear if there is a single formulary.

- ◆ If Add or Remove in Other Formularies is clicked, a new dialog appears. This dialog allows the user to specify which formularies the selected drug can be added to or removed.



**NOTE:** If the drug already exists in one or more formularies, those formularies will be automatically checked in the resulting Add or Remove in Other Formularies dialog. If the user unchecks a formulary, the drug will be removed from that formulary.

- ◆ The MDD still supports selection of multiple drugs. If the selected drugs are present in one formulary but not another, the Add or Remove in Other Formularies dialog will display a formulary as partially checked “-”. The user can click the partially checked box to either add the drug to all formularies or remove from all formularies.



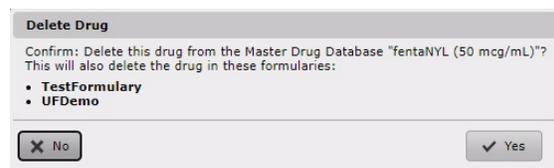
- ◆ When evaluating a single drug in the MDD, holding down the CTRL key on a keyboard while clicking the existing add to formulary toggle arrow in the Actions column provides a quick shortcut to the Add or Remove in Other Formularies dialog.

### MDD Undo

- ◆ Undo is not cleared by switching between active formularies.
- ◆ If multiple formularies are present, the Undo confirmation dialog specifies which formulary is affected.
- ◆ Undo works across multiple formularies when using one of the multi-formulary operations, such as the Add or Remove from Other Formularies button. However, Undo for operations in the Edit Formularies dialog (e.g., Adding, Deleting, Renaming, or Copying formularies) do not support Undo.

### Delete

- ◆ If a MDD drug is deleted which had been added to multiple formularies, the names of the affected formularies are included in the delete confirmation dialog.



## Changes to SLS Formulary Tab

### Drug Edit Dialog

- ◆ When editing a drug in the formulary, a new button titled Save to Other Formularies is displayed.

**NOTE:** This will not appear if there is a single formulary.

- ◆ If Save to Other Formularies is selected, a new dialog appears when saving the drug edits. This allows the user to specify which formularies the edited drug applies to. The active formulary is automatically selected.

**NOTE:** A formulary is disabled for selection in the Save to Other Formularies dialog if that formulary has properties that are different from the active formulary and the properties of the drug in the other formulary have been edited. This is similar to the way the AT prevents multi-edit for formulary drugs that have different options to prevent accidentally overwriting the other edits.

If all other formularies are disabled due to the above, then the entire Save to Other Formularies button is disabled since it has no selectable options.

### Custom Drug Classification Templates

- ◆ Custom Drug Classification Templates (i.e., DCT) are now tied to the template pack rather than the formulary. This is because it is possible to select different template packs for each formulary.
- ◆ If two formularies share a Custom DCT, changes to the DCT in one formulary also apply to the other formulary.

### Reports

- ◆ Formulary reports are generated on a per-formulary basis. When a formulary report is generated, it only includes data from the actively selected formulary.
- ◆ There is an exception to the above for the Export sheet of the report. This sheet is used to facilitate recreating a formulary import CSV, and includes entries for all formularies not just the active formulary.

### Changes to Drug Not Found Events

- ◆ All Drug Not Found (i.e., DNF) events are listed in the DNF filter view regardless of the current Active Formulary since users may wish to add DNF drugs from one formulary to others as well.
- ◆ A separate new DNF filter, Review, identifies DNF events for which the drug is present in at least one formulary but was not present in the formulary in which the drug was scanned on SLS.

**NOTE:** It is possible the drug was added to an incorrect formulary which is why there was a DNF.

When resolving DNFs, make sure to look at which Active Formulary is currently selected so that you add the drug to the formulary(ies) you want.

- ◆ The DNF tab will identify the name of the Formulary Package that was installed on the SLS where the DNF occurred.

**NOTE:** The Formulary Package name can be different than the Active Formulary name.

- ◆ DNFs events are Resolved if the drug is explicitly added to one or more formularies, as long as the add occurs after the DNF event.

- Clicking the Add to Formulary toggle button for a DNF event will add the drug to the current Active Formulary.

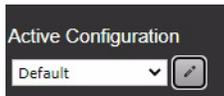


- DNFs events that are Resolved will be reset to Review if a new DNF event for the same drug occurs in a different formulary than that of the Resolved event (i.e. the installed formulary has a different name or different formulary version than the original DNF event).

**NOTE:** This allows you to have visibility if a DNF occurs in a different formulary after it has already been Resolved without requiring you to regularly Resolve DNF events that have already been addressed.

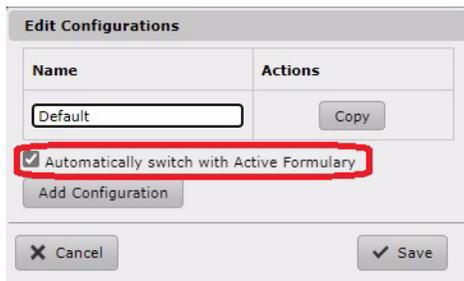
### Changes to Configuration Tab Added Active Configuration Selection

- The Active Configuration is displayed in the Configuration tab. It allows the user to specify the current active configuration and identify which one they are reviewing or updating.



**NOTE:** The initial Active Configuration is named Default but can be renamed (e.g., UFDemo).

- To add a new configuration, edit existing configuration names, or delete existing configurations, select edit (i.e., the pencil icon) in Active Configurations. The Edit Configuration is displayed.



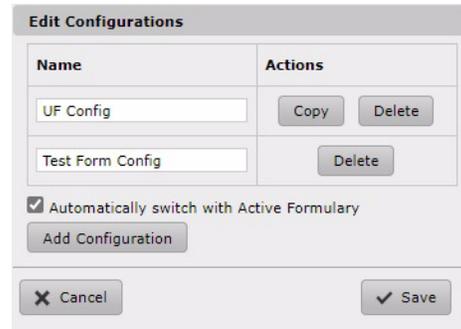
- Once a new formulary is created, a user can review and update that specific formulary by choosing it on the Active Formulary.

**NOTE:** A maximum of five (5) formularies and configurations are supported.

**NOTE:** All settings changes to the Active Configuration profile apply only to that Configuration profile.

### Editing Configurations

- The Edit Configurations dialog allows users to add, delete, and copy configuration profiles.



- A maximum of five (5) configuration profiles are supported. An error will be displayed if more than five (5) configuration profiles are added.
- The initial configuration profile is named Default and can be renamed or deleted by the user.
- Configuration profiles can only be deleted if there are two (2) or more configuration profiles. At least one configuration profile must always exist.
- If Automatically switch with Active Formulary is checked, changing the Active Configuration will automatically change the Active Formulary as well, and vice versa. This requires that a Formulary exists with the same name as the configuration.

**NOTE:** This setting will be **enabled** by default.

- If a formulary with the same name does not exist, automatic switching will not occur.

**NOTE:** To make sure that a syringe label will print on SLS PCS with the desired barcode, make sure that the barcode definition selected in the Configuration tab is compatible with the label template selected in the Formulary tab.

### Technical Support

If problems occur during operation, contact Codonics Technical Support at any time.

Phone: +1.440.243.1198

Email: support@codonics.com

Website: www.codonics.com

*Get it all with just one call*  
**800.444.1198**

All registered and unregistered trademarks are the property of their respective owners. Specifications subject to change without notice.

Patents: [www.codonics.com/ip/patents](http://www.codonics.com/ip/patents).

Copyright © 2023 Codonics, Inc. Printed in the U.S.A. Part No. 901-295-001.03



17991 Englewood Drive  
Middleburg Heights, OH  
44130 USA  
+1.440.243.1198  
+1.440.243.1334 Fax  
Email [info@codonics.com](mailto:info@codonics.com)  
[www.codonics.com](http://www.codonics.com)

Codonics Trading Co, Ltd.  
317 Xianxia Rd. Building B  
Unit 1412  
Changning Dist., Shanghai  
P.R. China, 200051  
86-21-62787701  
86-21-62787719 Fax

Codonics Limited KK  
AQUACITY 9F,  
4-16-23, Shibaura  
Minato-ku, Tokyo,  
108-0023 JAPAN  
81-3-5730-2297  
81-3-5730-2295 Fax