CAPSAHEALTHCARE

Pharmacy Automation

KL1Plus

"Aura" User Manual

Software version 11.4

KirbyLester
Automation by Capsa Healthcare

Elevating performance, every day.

Part # 810466 KL1Plus "Aura" User Manual Rev B

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Contents

Safety Notices

WARNING: The lightning flash with arrowhead symbol in an equilateral triangle indicates the presence of dangerous voltage within the product's enclosure that may be of sufficient magnitude to constitute a risk of electric shock.

AVERTISSEMENT : Le voyant clignotant composé d'une tête de flèche dans un triangle équilatéral indique la présence d'une tension dangereuse dans le boîtier du produit pouvant avoir une magnitude suffisante pour entraîner un choc électrique.

IMPORTANT: This symbol is intended to alert the user of the presence of important operating and maintenance instructions in the literature accompanying the machine.

IMPORTANT : Ce symbole vise à alerter l'utilisateur de l'existence d'instructions de fonctionnement et d'entretien importantes dans la documentation accompagnant la machine.

The following is a summary of safety information provided throughout this manual.

WARNING: Filled prescriptions must be verified by a qualified licensed pharmacist before dispensing to customers. The KL1Plus System is not intended for use as a substitute for appropriate prescription review by qualified pharmacy staff.

AVERTISSEMENT : Les ordonnances traitées doivent être vérifiées par un pharmacien titulaire qualifié avant toute remise de médicaments aux clients. Le Système KL1Plus ne doit pas se substituer à la révision appropriée des ordonnances de la part du personnel qualifié de la pharmacie.

WARNING: To help ensure accurate pill counts and proper operation, the machine must be kept clean. Failure to clean the machine (especially the optical sensor windows) may result in inaccurate pill counts or inability to count pills.

AVERTISSEMENT : Afin d'assurer l'exactitude du nombre de comprimés et le bon fonctionnement de la machine, cette dernière doit être gardée propre. L'absence de nettoyage de la machine (en particulier des fenêtres des capteurs optiques) peut entraîner des erreurs dans le compte des comprimés ou empêcher totalement l'opération.

WARNING: The medication database on the KL1Plus must be kept up-to-date. Kirby Lester provides medication updates to the database periodically and it is the pharmacy’s responsibility to ensure that the database is updated. Failure to maintain the database may result in inability to fill some prescriptions due to lack of appropriate medication data.

AVERTISSEMENT : La base de données de médicaments du KL1Plus doit être mise à jour régulièrement. Kirby Lester fournit des mises à jour périodiques de la base de données et la pharmacie doit s’assurer que cette base est actualisée en conséquence. En cas d’absence de mise à jour de la base de données, le système peut se trouver dans l’incapacité de traiter certaines ordonnances en raison d’un manque de données appropriées en matière de médication.

WARNING: To help ensure accurate prescriptions, always verify that the printed pharmacy label matches the prescription shown on the screen.

AVERTISSEMENT : Afin d’assurer l’exactitude des prescriptions, veuillez toujours vérifier que les étiquettes de pharmacie imprimées correspondent aux mentions affichées à l’écran.

WARNING: It is the user’s responsibility to remove the number of pills needed to bring the total count to the ordered quantity, and to return the excess medication to the bulk container.

AVERTISSEMENT : L’utilisateur est responsable du retrait du nombre de comprimés nécessaire afin de respecter la quantité commandée et du retour de tout excès de médicaments dans le conteneur en vrac.

CAUTION: Your warranty does not cover damage due to misuse or abuse, including damage while cleaning (e.g., broken glass sensor windows).

ATTENTION : La garantie ne couvre pas les dommages résultant d’une utilisation incorrecte ou abusive de l’appareil, incluant les dommages causés lors du nettoyage (bris des fenêtres en verre des capteurs, par exemple).

NOTES

- Because it contains patient information, prescription data must be handled and stored in accordance with the facility's Healthcare Information Portability and Accountability Act (HIPAA) guidelines.
- Prescriptions and other patient data shown throughout this manual are examples only and do not represent actual patient data. They are included to enhance the understanding of the procedures only, and are not intended to represent actual patient prescriptions.

What’s New

This manual covers version 11.4 of the KL1Plus “Aura” software.

To find your software version:

1. If the User System is turned on for your KL1Plus, log in as an administrator.
2. Tap ← **Back** until you reach the **Logout** screen.
3. Tap **Settings**.
4. If prompted to confirm your ID, enter your administrator credentials.
5. Tap **Update**.
   The KL1Plus will report the current software version and check for an update.
   If an update is available, you can update it now, or wait until a more convenient time.
6. Tap ← **Back** until you reach the **Scan** screen.

Inventory tracking

In this release of the Aura software, we have added the ability to track medication inventory.

The KL1Plus can keep track of your pharmacy’s stock of Scheduled medications or all medications.

This includes recording DEA222 form numbers and invoice numbers for medications you receive.

For details, see ***Inventory: Stock Mode*** on page 31.

Reports

The KL1Plus includes a browser-based application that lets you generate a number of different inventory reports for tracked medications.

See ***The Reports Dashboard*** on page 67.

General Information

Conventions used in this document

Types of notes

NOTE: This type of note provides information related to the current topic.

WARNING: This type of note provides important information about operating the KL1Plus, either from a safety or legal standpoint.

Terminology

This documentation uses specific terminology concerning the operation of the KL1Plus, and also some terms that are related to pharmacies and prescriptions.

Fp: Fingerprint. Some on-screen labels abbreviate fingerprint as **Fp** due to space constraints.

Individual users can add their fingerprint to allow login and confirmation. See ***Adding your fingerprint*** on page 50.

group: There are three predefined types of user accounts, called permission groups, each of which has different options available when using the KL1Plus.

- **Administrator:** Administrators manage the KL1Plus. They can configure the system, create and delete users, and update medications among other things. An administrator can do anything with the KL1Plus and does not need to be a person with only software and hardware responsibilities. There is one built-in administrator account, **admin**.
- **Pharmacist:** A pharmacist user can fill prescriptions and update prescription and drug information.
- **Technician:** Users logged in with a technician account can fill prescriptions.

For more information about permission groups, see ***The User System and Permission Groups*** on page 39.

keypad: Occasionally you will need to enter text or numbers into the KL1Plus software. When only numbers are allowed, the KL1Plus will present a numeric pad that looks similar to a calculator. When text, numbers, or symbols are allowed, the KL1Plus presents a keyboard similar to your computer keyboard. Tap the appropriate keys on the screen, then tap the **Submit** or **Enter** button.

For more details, see ***The keypads*** on page 16.

order, **Rx**, **script:** The KL1Plus software uses these terms as synonyms for “prescription.” We use the same term in the documentation when describing the features.

Rph: Registered pharmacist. Some operations on the KL1Plus may require confirmation by a user with a pharmacist account.

For information about creating a pharmacist user account, see ***Adding a user*** on page 55.

scroll: When the KL1Plus presents a list of information or a menu that won’t completely fit in the small screen space, you can scroll the list or menu. Place your finger on the screen and drag it in the direction that you want to scroll the information.

tap: Because the KL1Plus uses a touchscreen, operating it is much more like using a smart phone. In particular, when you need to interact with the software, it will almost always involve tapping on a button or other element on the screen.

To execute a successful tap, touch the screen briefly then remove your finger from the screen.

touch and hold: Occasionally the KL1Plus requires constant finger contact instead of a brief tap. Place your finger on the screen and hold until something happens.

Screens and figures

In this document, most of the KL1Plus screens will be shown as-is. In some cases, when the screen contains a large dark area, we'll present a color-altered version of the screen. We do this so that, if you print this document, you don't use up all of your ink or toner on screenshots!

Most of the diagrams of the KL1Plus in this manual are line drawings. These are usually slightly simplified from the actual machine, to make the images and descriptions clearer. For example, we won't show all the screws that are present on the actual KL1Plus. These simplifications will not omit anything important to the discussion at hand.

The Kirby Lester KL1Plus

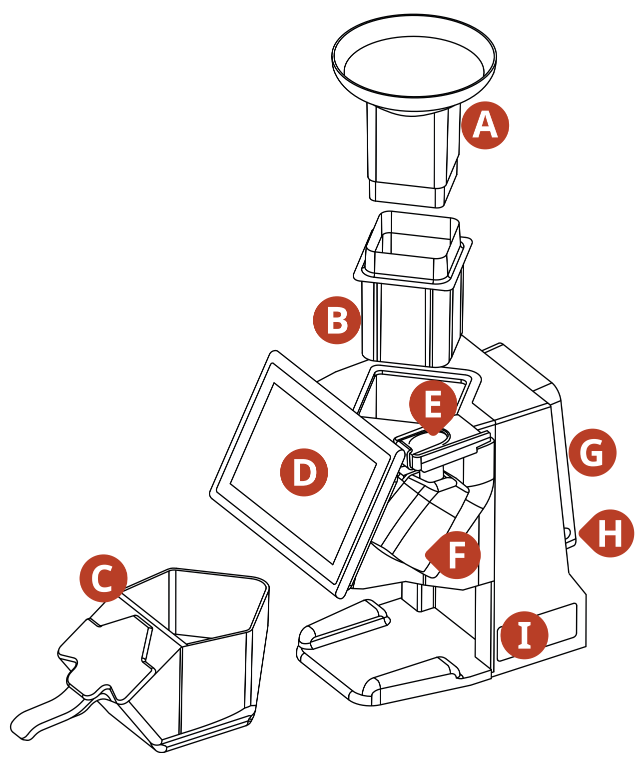


Figure 1: The Kirby Lester KL1Plus

A. **Pour funnel:** Pills poured into the funnel pass optical sensors that count them as they fall into the tray at the bottom.
B. **Channel:** The channel slides inside the KL1Plus and guides pills past the sensors.
C. **Dispensing tray:** The tray collects the pills poured through the funnel so they can be transferred to a prescription bottle or vial. Dual pour spouts simplify left- or right-handed dispensing.
D. **Touchscreen:** The touch-sensitive LCD screen provides the user interface for the KL1Plus software.

E. **Fingerprint scanner:** Users can log in to the KL1Plus with their fingerprint rather than a user ID and password.
F. **Barcode scanner:** Scan barcodes on pharmacy labels and medication bulk containers, and use a scannable ID card to log in.
G. **PC:** The Windows-based computer that hosts the KL1Plus software and controls the hardware.
H. **Power button (on PC):** This turns on power to the system. To turn the KL1Plus off, use the software. See ***Shutting down*** on page 13.
I. **Model and serial number:** Technical support may ask you for this information.

Not shown:

- Four USB ports on the right side of the PC (when looking at the KL1Plus from the front). The fingerprint/barcode module uses one of these ports; you can use the others for external devices you need. See ***External devices*** on page 17.
- An RJ-45 network jack on the left side of the PC. The KL1Plus requires network access to communicate with your pharmacy management system and to receive software updates and technical support.
- An HDMI port on the left side of the PC.
- The power cord connector on the back of the KL1Plus.

Functions

The KL1Plus is designed to help you fill and verify pharmacy prescriptions. The KL1Plus performs the following functions:

- Verifies that the correct medication is selected by comparing the scanned pharmacy label barcode to the medication's Universal Product Code (UPC) barcode.
- Accurately counts pills.
- Accurately and electronically tracks scheduled and drugs of high concern.
- Allows easy lookup of dispensed medication information.
- Provides an easily updated medication database.
- Interfaces to a pharmacy management system.
- Allows administrative users to configure system settings.

> **NOTE:** The KL1Plus can't accurately count clear pills or most gelcaps, and may not accurately count items with a large hole or an odd shape. To alleviate some issues with oddly-shaped pills, you can turn on Special Mode for specific drugs (see ***Viewing and modifying an existing medication*** on page 62) or while using KL1 Mode (see ***KL1 Mode*** on page 71).

Specifications

	Specifications
Size	**Height:** 14.6 in (37.1 cm) **Width:** 8.0 in (20.3 cm) **Depth:** 12.5 in (31.75 cm) **Weight:** 9.6 lb (4.4 kg)
Power cord	Detachable; approximately 6 ft (1.8 m)
Cooling	Air-cooled
Counting Capacity	Sensors capable of counting up to 15 pills per second
Power Requirements	**Input Voltage:** 100-132/190-264V AC (factory preset) **Frequency:** 47–63 Hz **Current Draw:** 30 VA Main supply voltage fluctuations are not to exceed 10% of the nominal supply voltage
Power Consumption	30 VA
Barcode Scanner	You can configure barcode setup using Admin Mode. See ***Barcode Configuration*** on page 45.
Operating System	Windows 10 Enterprise
Network connection	RJ-45 network connector located at the back left side
USB Ports	Four USB 2.0 connectors located at the back right side
Pollution degree	2
Installation category	II
Altitude	Up to about 6500 feet (2000 meters)
Humidity	20% to 80%
Temperature	40°F to 95°F (5°C to 35°C)
Use	Intended for indoor use only

Installing the KL1Plus

1. Remove the KL1Plus from its box.
2. Remove the dispensing tray, pour funnel, and power cord. Set them aside.

> **IMPORTANT:** Save the box and packing materials in case you need to return your KL1Plus for service.

3. Let the KL1Plus adjust to room temperature for at least 30 minutes before you start using it.
4. Place the KL1Plus on a stable counter with enough space to allow access to all sides and the top.
5. Insert the pour funnel into the square collar on top of the KL1Plus.
6. Insert the dispensing tray into the KL1Plus base, with the handle pointing to the front.
7. Connect an Ethernet cable to the RJ-45 jack on the left side of the KL1Plus PC, then connect it to your pharmacy’s network.
   The KL1Plus requires network access in order to communicate with your pharmacy management system and to receive software updates and technical support.
8. Connect the power cord to the back of the KL1Plus, then plug the other end into a grounded outlet.
   To protect your KL1Plus from transient power spikes, you should plug it into a surge protector.

> **NOTE:** When you plug in the KL1Plus, it will emit a short sharp beep. This is normal.

Powering on

Press the power button on the right side of the PC.

The KL1Plus will produce a series of tones as it powers on. When the power-on process is complete, you can start using the system.

> **NOTE:** If the KL1Plus beeps but the screen remains black, it will shut down on its own after 30 seconds. If this happens, do not repeatedly press the power button. Instead, allow the system to shut itself down, unplug it, wait at least 30 seconds, then plug it in and press the power button.

Shutting down

Always use the touchscreen to shut down the KL1Plus.

1. Tap ← **Back** until you reach the **Logout** screen.
2. Tap **Shutdown**.
   If you decide not to shut down, tap ← **Back** again. The KL1Plus will return to the **Scan** screen.
3. In the confirmation message, tap **Yes** to shut down immediately, or tap **No** to cancel the shutdown process and return to the **Logout** screen.
   If you don't tap either button, the KL1Plus will shut down in 10 seconds.

> **NOTE:** Don't unplug the KL1Plus unless it has been shut down.

The User System

By default, the KL1Plus is set up so that you don't need to log in; anyone in your pharmacy can use the system to fill prescriptions and perform other activities.

This is a convenience to smaller shops where it isn't necessary to track user activity.

If your organization requires you to maintain records about who filled prescriptions and other activities, then you should activate the User System. This allows for individual users to log in to the system.

To activate the User System:

1. Tap ← **Back** until you reach the **Logout** screen.
2. Tap **Settings**.
3. Tap **Users**.
4. Tap **User System Enablement**.
5. Tap the OFF switch to turn the User System on.

Differences

Here are some of the more notable differences in operations when the User System is turned on:

- Users need to log in to use the system. Each user needs their own account.
  To set up user accounts, see ***Adding a user*** on page 55.
- The **Logout** screen has an option to **Log Off**, so that another user can log in.
- Some operations require the user to validate their identity by logging in again.

Logging in

With the User System turned on, the KL1Plus it will display the **Login** screen when you turn it on.

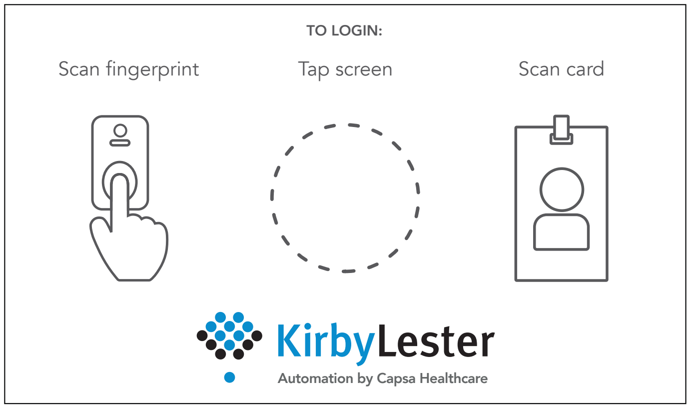


Figure 2: The Login Screen (colors altered for print)

There are three ways to log in: with a User ID and Password, with a fingerprint scan, or with a barcode ID scan card.

The first time you log in you must use your User ID and Password, which will be provided to you by the KL1Plus administrator. After this, you should change your password (see ***Change Password*** on page 51), and you can add a fingerprint (see ***Register Fingerprint*** on page 49), a scannable barcode (see ***Register Scan Card*** on page 51), or both.

> **NOTE:** Only one user can be logged in at a time.

Logging in with a password

1. Tap the screen to display the login keypad.
2. Tap in the top field and enter your User ID.
   Tap the ⌫ **Clear** symbol at the right end of the field if you need to clear what you have typed.
3. Tap the bottom field and enter your Password.
   Touch and hold the 👁 **View** symbol in the password field to see what you have typed.
4. Tap **Submit** when you have entered the information.

Logging in with your fingerprint

To log in with your fingerprint, place your finger on the fingerprint scanner. Push down gently. The KL1Plus will alert you if your finger wasn't recognized; lift it off the scanner and try again.

Figure 3: The Fingerprint Scanner

Logging in with a scan card

If you have been issued an ID card with a barcode for logging in to the KL1Plus, just hold the card about 5 inches below the barcode scanner so that the barcode is under the red crosshairs.

Logging out

Tap the ← **Back** button at the top left of the screen until you reach the **Logout** screen, then tap **Log Off** to exit the KL1Plus software and return to the **Login** screen.

You can also tap **Shutdown** to exit the software and power down the KL1Plus.

Using the software

The KL1Plus runs a version of the Windows operating system. Since interacting with the device is exclusively done via the touchscreen, operating it is a lot like using your smartphone.

Unlike many smartphones, you can operate the KL1Plus while wearing latex or other medical gloves.

Tap, touch, and scroll

While the KL1Plus touchscreen is similar to a smartphone, there are only a few different operations or "gestures" that the KL1Plus supports.

tap: Quickly touch the screen then remove your finger to perform an action: type a character, select an option, or dismiss a message.

touch and hold: Place your finger on the screen and hold until something happens. For example, touch and hold the **View** symbol in a password field to see the text you have entered. Remove your finger to hide the password again.

scroll: Place your finger on the screen and drag it in the direction that you want to scroll a listing.

> **TIP:** You can identify a scrollable screen by the way it fades out at the bottom or top of the content area.

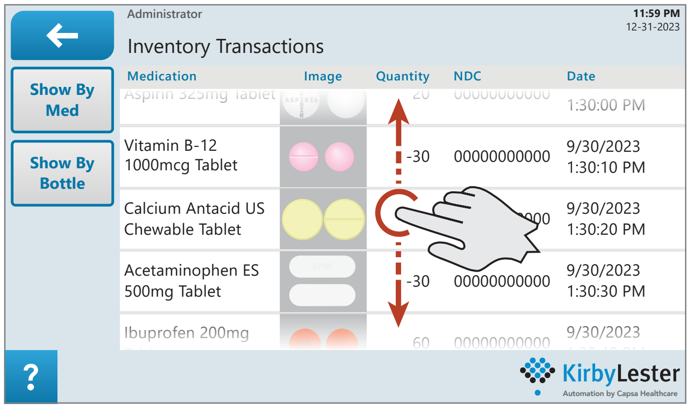


Figure 4: Scrolling List

Where to tap

Screen targets on the KL1Plus have been designed to be consistent and intuitive: buttons are rectangular, labeled with their function. If there is a list, such as a list of prescriptions, usually you can tap an entry in the list for more details.

The ← **Back** button at the top left of the screen will take you out of the current workspace. If you are in the middle of an operation, the KL1Plus may prompt you to complete or abandon the task.

The keypads

Login ID, search terms, and pill counts are some of the types of information you will need to enter into the KL1Plus. There are two types of keypads—on-screen keyboards—for this.

The numeric keypad

The KL1Plus will display a numeric keypad when the data that it expects you to enter is a number. Tap the ⌫ **Delete** key to back up and make corrections.

When you are finished, there will be another button, not part of the keypad, that you tap to continue.

The alphanumeric keypad

The KL1Plus displays the alphanumeric keypad when you need to enter text or an alphanumeric string. This may include entering your User ID and password or the name of a medicine.

The keypad initially presents lowercase letters and digits.

To type an uppercase letter, tap ⇧ **Caps**, then tap the letter. After you type a capital letter, the keypad reverts to lowercase.

> **TIP:** If you touch and hold the ⇧ **Caps** key for at least one second, it becomes a ⬆ **CapsLock** key. All letters you type after this will be capitalized. CapsLock remains On until you tap the key again.

To type symbols, tap @# **SymLock**. This lets you enter digits, punctuation, basic mathematical symbols, and special characters. The keypad stays "locked," presenting digits and symbols until you tap the Abc **AlphaLock** key.

For text entry, you will type text into a field (or two fields, in the case of User ID and Password). Tap in the field, type the text, then tap the appropriate button on the screen. For example, to enter your User ID and Password, tap the **Submit** button.

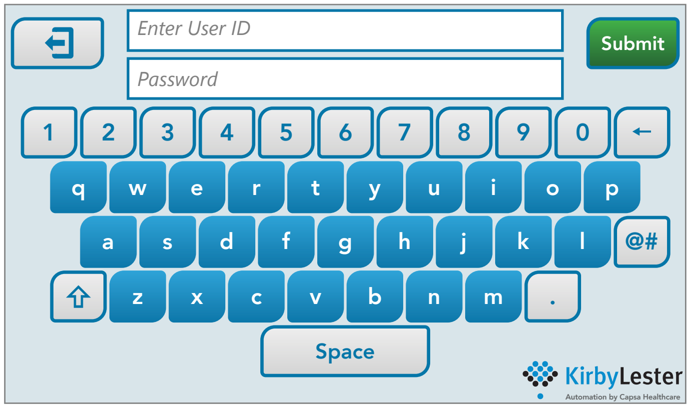


Figure 5: The Alphanumeric Keypad

> **TIP:** When you enter text in a field, such as the **User ID** field, the **Clear** symbol will appear at the right end of the field. You can tap this to erase all the text you have typed in the field.

External devices

The KL1Plus has four USB ports. One of these is used by the fingerprint/barcode scanner module. The others are available for external devices.

Keyboard and mouse

If the touchscreen is difficult to use, you can connect a keyboard and mouse to the USB ports. You can use any Windows-compatible keyboard and mouse, including wireless combinations that use a plug-and-play USB "dongle."

Wi-Fi

If you don't have ready access to an Ethernet connection, you can connect a USB Wi-Fi adapter.

> **TIP:** If you need to download a driver for your Wi-Fi connector, you can download it on a different system, copy it to a properly-formatted USB thumb drive, then install it on the KL1Plus from there.

Display

There is an HDMI port on the left side of the PC, below the network connector. If you have the space, you can connect an external display to the KL1Plus. The built-in screen will be mirrored, so you'll see a 1024 × 600 image centered on the external display.

Support

You can get additional technical assistance from:

Capsa Healthcare
8170 Dove Parkway
Canal Winchester, OH 43110
800.243.2465
techsupport@capsahealthcare.com

Processing Prescriptions

IMPORTANT: Filled prescriptions must be verified by a qualified licensed pharmacist before dispensing to customers. The KL1Plus is not intended for use as a substitute for appropriate prescription review by qualified pharmacy staff.

Pourable and non-pourable medications

There are two kinds of medications come in two varieties: pourable and non-pourable.

- **Pourable** medications are pills that can be poured through the KL1Plus funnel and counted.
- **Non-pourable** medications include patches, liquids, pills in prepackaged blister packs, and inhalers.

The prescription process

To fill a prescription, follow this basic process:

- Start the prescription by scanning the prescription label, typing in the prescription number, or selecting it from the fill queue.
- For a pourable medication:
  - Verify the source by scanning or entering the UPC label.
  - Fill the prescription with whole bottles, by counting out pills, or a combination of these.
- For a non-pourable medication, fill the prescription by scanning or entering the UPC label code for the medication. (This is the package delivered to the customer.)

While you are filling a prescription, the bottom of the screen shows the steps in the process that you fulfill using the KL1Plus.

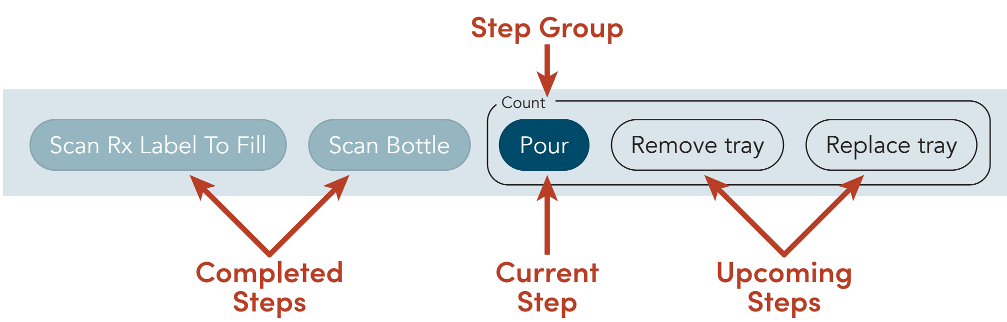


Figure 6: Prescription Process Steps

Steps that aren't shown on the screen are those you perform apart from the KL1Plus. In the example screen, the **Count** group doesn't show that between the **Remove tray** and **Replace tray** steps, you would probably remove pills from the tray (by pouring them into a vial, for example).

The fill queue

The KL1Plus maintains a list of prescriptions waiting to be filled, called the fill queue.

Prescriptions get added to the fill queue in two different ways: by data received from your pharmacy's management system, and by scanning a prescription barcode label.

If you scan a prescription barcode label, you will usually fill the prescription right then and there. However, you can scan the label and postpone filling the prescription, in which case the prescription will be added to the fill queue.

To review the fill queue, tap **View Orders** from the **Scan Mode** screen. (The **View Orders** button indicates how many unfilled orders are in the fill queue.)

This shows the open orders, from the pharmacy management system and also those that have been scanned and postponed.

To return to the **Scan Mode** screen, tap ← **Back**.

Canceling a prescription

To delete a single prescription from the fill queue:

1. In **Scan Mode**, tap **View Orders**.
2. In the **Open Orders** list, tap the prescription to cancel.
3. Tap ← **Back**.
4. In the next screen, tap **Cancel Script**.

The prescription will be canceled and you’ll be returned to the **Scan Mode** screen.

Deleting all prescriptions

To delete all pending prescriptions in the fill queue:

1. In **Scan Mode**, tap **View Orders**.
2. In the **Open Orders** list, tap **Clear Rx**.
3. In the confirmation message, tap **Delete**.

You’ll be returned to the **Open Orders** list, which will be empty.

Starting a prescription

There are three ways to start filling a prescription: scan the printed label, enter the prescription number manually, or select it from the fill queue.

All three methods start in **Scan Mode**.

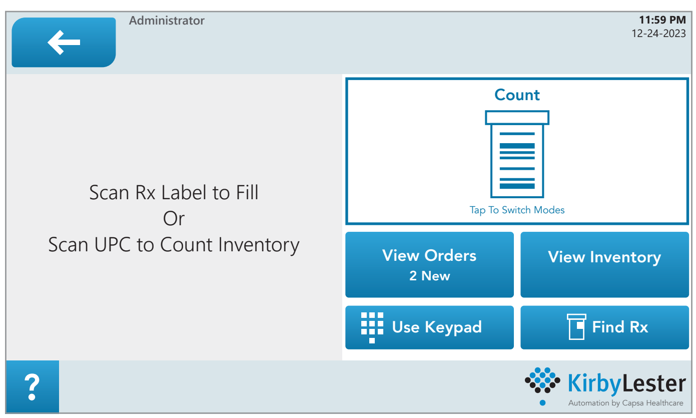


Figure 7: Scan Mode Screen (colors altered for print)

- If you are at the **Logout** screen, tap ← **Back** to reach the **Scan Mode** screen.
- If you are in **KL1 Mode**, tap ← **Back** to enter **Scan Mode**.
- If you are at any other screen, tap ← **Back** until you reach the **Logout** screen, then tap ← **Back** to enter **Scan Mode**.

Scan a prescription label

The prescription barcode label is a label printed by your pharmacy's management system. You use printed labels if your management system is not interfaced with the KL1Plus.

To scan a label, first make sure you are in **Scan Mode**.

Hold the printed label about 3–4 inches below the barcode scanner, so the scanner's red beam crosshairs are near the center of the barcode.

Figure 8: Scanning a Prescription Label

The KL1Plus will beep and the screen will change to the **Scan Bottle** screen (for pourable medications) or the **Scan Package** screen (for non-pourable medications).

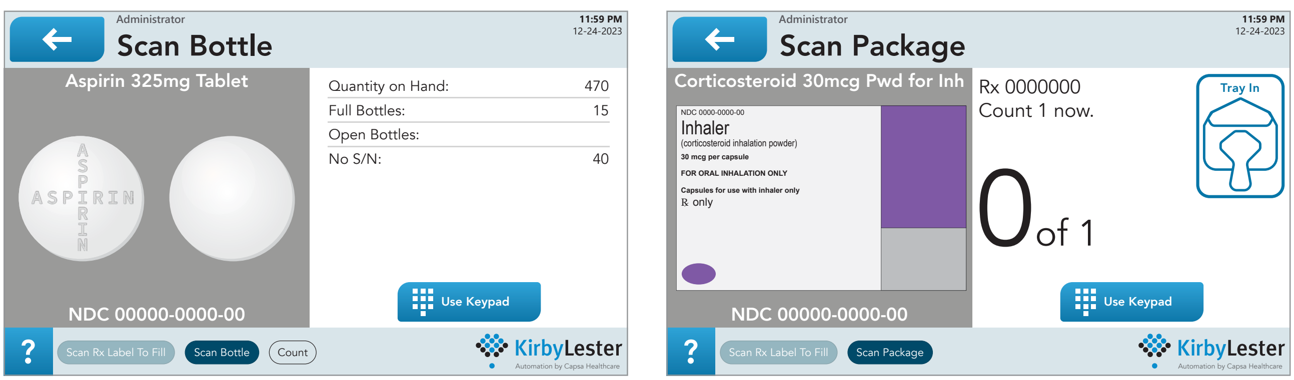


Figure 9: Scan Bottle and Scan Package Screens

Enter a prescription number manually

1. In **Scan Mode**, tap the **Use Keypad** button.
2. On the next screen, tap the **Enter Label** button.
3. Enter the prescription label number, then tap **Submit**.

The screen will change to the **Scan Bottle** or **Scan Package** screen (see Figure 9 above).

Select a prescription from the fill queue

In **Scan Mode**, tap **View Orders**.

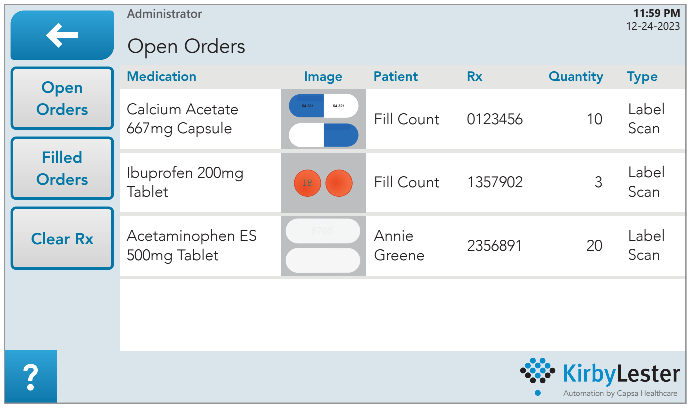


Figure 10: Open Orders Screen

In the **Open Orders** screen, tap the prescription that you want to fill.

The screen will change to the **Scan Bottle** or **Scan Package** screen (see Figure 9 on page 21).

Other prescription options

After you have entered the prescription barcode, you have options if you can’t fill the prescription immediately.

Tap ← **Back** to see these options. Tap:

- **Go Back:** to return to the **Scan Bottle** or **Scan Package** screen.
- **Fill Later:** to add the prescription to the fill queue, to be filled later.
- **Cancel Script:** to cancel the prescription. (This will remove it from the fill queue.)
- **Manually Filled:** to indicate that the prescription was filled manually, without using the KL1Plus for counting. (This will remove it from the fill queue and add it to the **Filled Orders** list, or archive the prescription, depending on KL1Plus settings.)

Fill a pourable medication prescription

To fill a prescription with a pourable medication, you need to confirm that you are using the correct medication to fill the prescription, then pour the pills and fill a vial.

Confirm medication with the UPC code

To confirm that you have the correct medication to fill the prescription, scan the UPC barcode on the medication bottle, or tap **Use Keypad** and enter the UPC code manually.

When you have confirmed the UPC code, you are ready to pour pills.

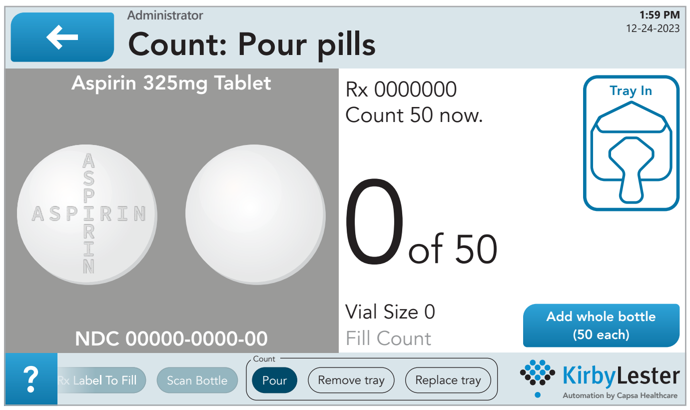


Figure 11: The Pour Screen

Scan error

If you receive an error when you scan the UPC, confirm that you have the correct medication. If so, try re-scanning the bottle, or enter the UPC code manually.

You can also tap ← **Back** for more options when you have scanned a UPC code that is different from the prescribed medication.

These options are:

- **Go Back:** to return to the **Scan Bottle** or **Scan Package** screen.
- **Fill Later:** to add the prescription to the fill queue, to be filled later.
- **Cancel Script:** to cancel the prescription. (This will remove it from the fill queue.)
- **Manually Filled:** to indicate that the prescription was filled manually, without using the KL1Plus for counting. (This will remove it from the fill queue and add it to the **Filled Orders** list, or archive the prescription, depending on KL1Plus settings.)
- **Scan Override:** to use the scanned medication as a substitute for the prescribed medication.

You will be prompted to confirm the substitution; if you cancel this, then you'll return to the list of options. If you accept the substitution, you'll be prompted to pour pills for the new medication.

Using whole bottles

The **Pour Screen** may give you the option to add whole bottles to your prescription. This will happen if the prescription count is at least the bottle size.

If the **Pour Screen** has the **Add whole bottle** button:

1. Tap **Add whole bottle**.
   You are now returned to the **Confirm** screen, which shows that you have partially filled the prescription.
2. To continue, scan the UPC barcode again (or tap **Use Keypad** and enter it manually).
   This again displays the **Pour Screen**.
3. If the **Pour Screen** still has the **Add whole bottle** button, you can follow the steps above again, or start pouring individual pills.

If you fill the entire prescription with whole bottles, the screen will return to **Scan Mode**. The just-filled prescription should be at the top of the **Filled Orders** list. (If your KL1Plus is configured to **Archive on Completion**, the prescription will be archived and will not appear in the **Filled Orders** list.)

Pour pills

1. Pour pills from the scanned bottle into the funnel.

   > **NOTE:** For best results, pour pills onto the side of the funnel so they gently tumble into the hole. If you pour too many pills too quickly, the KL1Plus will warn you to pour slower.

   Watch a video that shows you how to pour medications without miscounts:

   https://www.youtube.com/watch?v=2rq3G7BEnjY
2. As the desired quantity of pills approaches, pour more slowly and stop at your target count.
3. When you have successfully counted the pills for the prescription, remove the tray and pour the pills into a vial.
4. Cap and label the vial.
5. Return the tray to the KL1Plus.
   It will automatically return to **Scan Mode**.

> **NOTE:** If the medication requires a recount or back count, you will be prompted to perform those actions before the device returns to **Scan Mode**.

Fill a non-pourable medication prescription

To fill a prescription with a non-pourable medication, you need to scan the package that will be given to the customer.

After you start the prescription (by scanning a label, entering a prescription number manually, or selecting it from the **Open Orders** list), you'll see the **Scan Package** screen (see Figure 9 on page 21).

The **Scan Package** screen tells how many packages you'll need to scan to fill the order.

Scan the package's UPC code, or tap **Use Keypad** and enter the UPC code manually.

Continue scanning packages until the **Scan Package** screen is replaced by the **Scan Mode** screen.

> **IMPORTANT:** You need to scan each package you will deliver to the customer, rather than scanning one package multiple times. This adds a check to your process to ensure that all the packages you deliver are correct.

To view the filled order, tap **View Orders**, then tap **Filled Orders**. The order you just filled should be at the top of the list.

Reviewing filled orders

When you fill a prescription, it will be added to the **Filled Orders** list.

Archived orders do not appear in the **Filled Orders** list:

- The **Filled Orders** list is cleared every time the KL1Plus data is archived.
- If **Archive on Completion** is turned On, a filled prescription will be archived immediately and will not be added to the **Filled Orders** list.

To view filled orders:

1. Start at the **Scan Screen**.
2. Tap **View Orders**.
   This displays the **Open Orders** screen.
3. Tap **Filled Orders**.

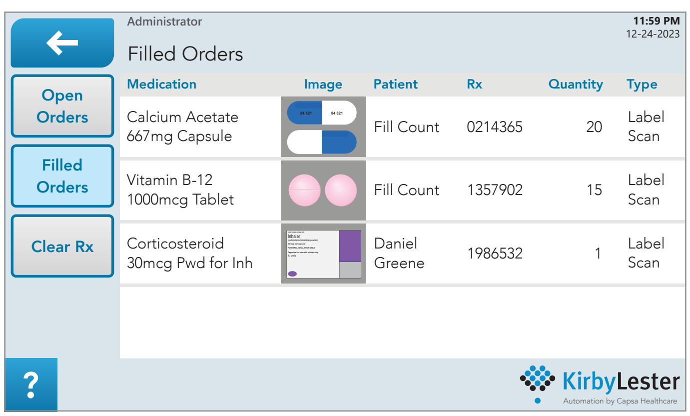


Figure 12: The Filled Orders Screen

4. To see details of a filled order, tap the order in the list.

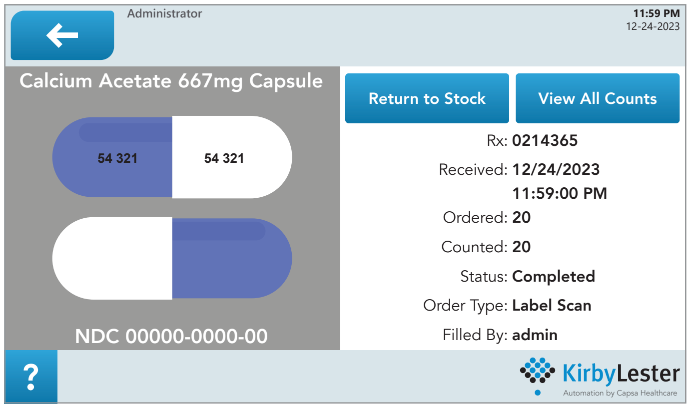


Figure 13: Details of a Filled Order

Tap **View All Counts** to see a list of the count events that went in to filling the order.

About archived orders

Your KL1Plus can archive filled prescriptions. This reduces clutter in the **Filled Orders** list, and also allows your pharmacy to re-use prescription numbers.

There are multiple options for archiving:

- Orders can be archived automatically as soon as they are filled.
  If this is enabled, the only way to review such an order is to use **Find Rx**. See ***Finding a prescription*** on page 26.
- Orders can be archived on a schedule. Every day at a set time, orders that are the specified number of days old are archived.
  If this is enabled, recent orders are retained in the **Filled Orders** list.
- Orders can always be archived on demand.

> **NOTE:** An order will not be archived if it has been partially filled or if it is awaiting a **Check Count**.

For details on the available settings, see ***Archiving*** on page 48.

Finding a prescription

You can look up a prescription to see when it was filled and who filled it.

1. From the **Scan Mode** screen, tap **Find Rx**.
2. Scan the barcode on the prescription label, or tap **Scan or Enter Rx Now** to enter the prescription number manually.
3. The results screen will indicate how many archived and current prescriptions there are with your prescription number. Tap the appropriate **Choose** button.
   - **Archived:** Shows a list of all archived prescriptions that have the prescription number that you entered.
   - **Current:** Shows a list of all prescriptions that haven’t been archived, that have the prescription number that you entered.
4. Tap the relevant prescription.

Inventory: Count Mode

You can use the KL1Plus to count the inventory you have on hand. You can use this to count as many medications as you need to, from a single medication up to everything in your pharmacy.

Using Count Mode does not track inventory stock.

Clearing the current inventory

When you perform a physical inventory to count medications on hand, you need to clear the current inventory on the KL1Plus.

To clear the inventory count for all medications, see ***Clear Inventory Counts*** on page 57.

To clear inventory count for a single medication:

1. In **Scan Mode**, tap **View Inventory**.
2. Tap **Show By Med**.
3. Tap the medication that you will be counting.
   Be sure to tap the correct medication and dosage.
4. Tap **Delete All Counts**.
5. In the confirmation message, tap **Delete**.

Tap ← **Back** to return to the **Scan** screen.

Counting pourable medications

To count inventory for a pourable medication:

1. Gather the medication that you are counting.
   Be sure you have the correct dosage level. Gather all bottles as well as your bulk medication.
2. Scan the UPC code for the medication you are counting.
   You can scan your bulk medication label or the label from a bottle.

Figure 14: Count Inventory Screen (Pourable Medication)

3. From the **Count Inventory** screen, you can:
   - Pour bulk pills to count them.
   - Add the number of bottles you have on hand.
   - Add a manual count of bulk or loose pills.

   Your inventory count will probably include more than one of these methods.

To count bulk medication:

> **NOTE:** If you have more bulk pills than will comfortably fit in the dispensing tray, you will need to perform multiple counts. Have a temporary transfer container on hand.

1. Scan the medication's UPC code to enter the **Count Inventory** screen.
2. Pour pills from your bulk container into the KL1Plus.
3. When you are done pouring, remove the dispensing tray.
4. Return the counted pills to your bulk container.

> **NOTE:** If you can't count all your bulk pills with one pour, then transfer the counted pills to a temporary container, and after replacing the tray, scan the UPC code again to continue counting.

5. Replace the dispensing tray.

The KL1Plus returns to the **Scan** screen.

To count bottles:

1. Scan the medication's UPC code to enter the **Count Inventory** screen.
2. Tap **Add Bottle(s)**.
3. Enter the number of medication bottles on hand and tap **Enter**.

The KL1Plus returns to the **Scan** screen.

To add a manual pill count:

1. Scan the medication's UPC code to enter the **Count Inventory** screen.
1. Tap **Add Manually**.
2. Enter the number of pills counted manually and tap **Enter**.

The KL1Plus returns to the **Scan** screen.

Counting non-pourable medications

To count inventory for a non-pourable medication, scan the UPC code for the medication you are counting.

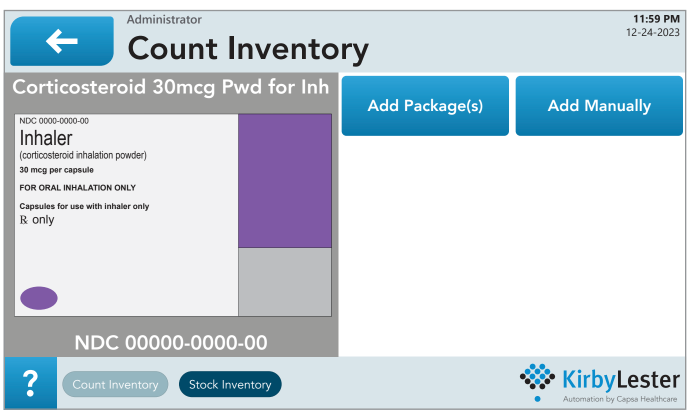


Figure 15: Count Inventory Screen (Non-pourable Medication)

From the **Count Inventory** screen, you can:

- Add the number of packages you have on hand.
- Add a manual count of individual units.

To count packages:

1. Scan the medication's UPC code to enter the **Count Inventory** screen.
2. Tap **Add Package(s)**.
3. Enter the number of medication packages on hand and tap **Enter**.

The KL1Plus returns to the **Scan** screen.

To count individual units:

1. Scan the medication's UPC code to enter the **Count Inventory** screen.
2. Tap **Add Manually**.
3. Enter the number of individual units on hand and tap **Enter**.

The KL1Plus returns to the **Scan** screen.

Viewing and editing inventory counts

In **Count** mode, tap **View Inventory**. This shows all individual medication count events.

- Tap a count event for details on that event, to edit the quantity counted, or to delete the count event.
- Tap **Show By Med** to see the total counts for each medication.
- Tap **Show All** to return to individual count events.

Tap **Back** to return to the Scan screen.

Error messages

Prescription errors

If a prescription is received from the pharmacy information system with errors, an error message is shown when the prescription is selected and the prescription cannot be processed. The order must be corrected and re-sent from the pharmacy information system.

Over Count

WARNING: It is the user's responsibility to remove the number of pills needed to bring the total count to the ordered quantity, and to return the excess medication to the bulk container.

AVERTISSEMENT : L'utilisateur est responsable du retrait du nombre de comprimés nécessaire afin de respecter la quantité commandée et du retour de tout excès de médicaments dans le conteneur en vrac.

If you pour more pills than the quantity ordered, the KL1Plus will display the **Over Count** message.

Remove the tray, remove the excess medication manually, and return it to the bulk container.

Pour the prescribed quantity into a vial to complete the prescription fill and return the tray to the machine.

Pour Slower

The KL1Plus is capable of counting up to 15 pills per second. If you pour too fast, the device will display the **Pour Slower** message. Slow down immediately. (The **Pour Slower** message will disappear when you slow your pouring speed, so it may appear to flash on the screen.)

If you continue to pour too quickly, you may see an **Over Speed** error, which will force a recount.

It's recommended you perform a recount if you see the **Pour Slower** message during a pour.

Over Speed

If you pour pills through the funnel too quickly for the KL1Plus to count them accurately, it displays the message **Over Speed**. Stop, remove pills from the tray, return the tray, and repeat the count.

Partial Pill Detected

After you have poured 8 or more pills, the KL1Plus determines the approximate size of each pill in your pour. If at some point it detects a pill or fragment that is smaller than about 25% of the expected pill size, it will display the message **Partial Pill Detected**.

You can respond in one of two ways:

- Complete your pour, remove the tray, remove the pill fragment(s) and the pills, return the tray, and repeat the count.
- Remove the tray, remove the pill fragment(s), return the tray, complete the pour, then repeat the count.

Unexpected tablets

If you pour pills before scanning a prescription label, the KL1Plus displays the message **Unexpected tablets in tray**. Remove the tray, remove the pills, return the tray, and scan or enter a prescription number.

Remove and empty tray

If you pour pills through the funnel before the KL1Plus validated a UPC or a count was started, the KL1Plus displays the message **Remove and empty tray**.

Remove the tray and return the pills in the tray to the stock bottle. Return the tray and scan a barcode or start a manual count.

Finish Fill (KL1 Mode)

If you tap ← **Back** when the tray is out while using KL1 Mode, the device displays the message **Finish Fill Before Returning Home**.

Return the tray.

If you are using Inventory Mode, continue pouring or tap **Zero**, then remove and return the tray.

Inventory: Stock Mode

The KL1Plus can track perpetual inventory for Scheduled medication, or for all medications in your pharmacy.

Stock Mode is different from Count Mode. In Count Mode, you can count pills to provide a snapshot of your current inventory; there is no tracking done.

In Stock Mode, the KL1Plus tracks your pharmacy's current Quantity on Hand (QOH) and all transactions for medications in your inventory. You can specify whether tracking is done for all medications or only for Scheduled medications.

Switching to Stock Mode

You enter Stock Mode at the **Scan** screen.

To reach the **Scan** screen, tap ← **Back** until you reach the **Logout** screen, then tap ← **Back** again.

The scan mode is shown in the block at the top right of the screen. The scan mode is either **Count** or **Stock**.

If the screen shows **Count**, tap the **Count** icon, then tap the **Stock** icon.

If the screen shows **Stock** at the upper right, then your KL1Plus is in Stock Mode.

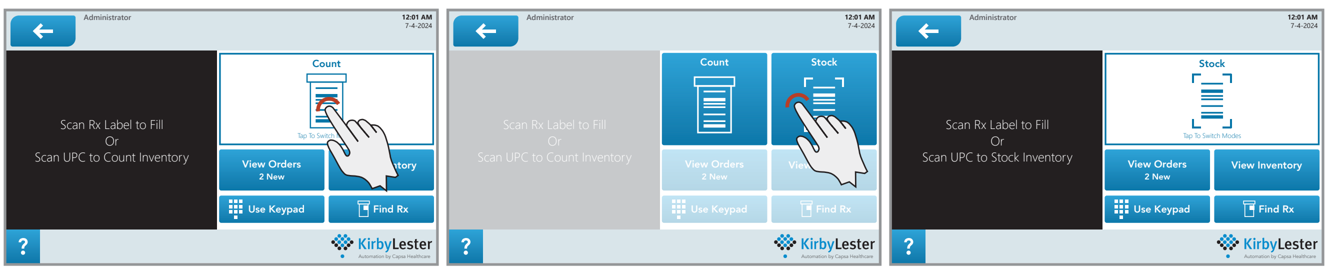


Figure 16: Switching to Stock Mode

Turning on inventory tracking

There are two options for tracking inventory: tracking only Scheduled medications, or tracking all medications. The option you decide to use will depend on the needs of your organization.

To turn on inventory tracking:

1. Tap ← **Back** until you reach the **Logout** screen.
2. Tap **Settings**.
   If prompted, enter your credentials.
3. On the **Settings** screen, tap **Inventory Settings**.
4. Tap **Inventory Tracking Settings**.
5. Tap the **Inventory Tracking Mode** menu, then select:
   - **DEA Only** to track only Scheduled medications
   - **Tracking On** to track all medications
   - **Tracking Off** to stop tracking inventory
6. Tap ← **Back** until you reach the **Scan** screen.

You should also verify other settings that affect how Stock Mode works.

Other settings related to Stock Mode

Settings > Inventory Settings > Inventory Access

This setting determines who in your organization can access Stock Inventory features (including returning pills to stock).

To allow all users to access inventory features, tap **Anyone can access Inventory** to turn this on.

To only allow members of specific permission groups to access inventory features, tap **Inventory access by permission group** to turn this on instead, then turn on the different permission groups that you want to grant access to.

If you specify permission group access, users will be prompted to enter their credentials when they try to access Stock Inventory features.

Settings > Inventory Settings > Reset Inventory

This function archives then clears all your tracked inventory counts. This is irreversible; only perform this if you are sure you need to clear your tracked inventory counts.

You'll be prompted to confirm this operation.

> **NOTE:** This function does not affect the Count Mode static inventory counts.

Settings > Inventory Settings > Adjustment Reasons

If a user makes a manual adjustment to perpetual inventory, they'll be prompted to supply a reason for the adjustment.

You can add common reasons to your KL1Plus, then the user making an adjustment can select one of these reasons.

Users can also type in a reason for the adjustment.

> **NOTE:** If you prefer that people use consistent reasons, it will be worthwhile to identify and enter common reasons for adjusting stock counts.

Settings > System Settings > Workflow Settings > Stock Inventory

These settings determine the tasks a user must perform when adding a received medication to your inventory.

Here you can set whether the user needs to perform a recount of the medication to confirm the count, whether a DEA Form #222 is required for Scheduled drugs, and whether an invoice is required for received medication.

Settings > System Settings > Workflow Settings > Audit Inventory

With these settings, you can allow a user to adjust on-hand medication counts.

Settings > System Settings > Workflow Settings > Return to Stock

These settings determine the behavior of the KL1Plus when a user returns an unfulfilled prescription to stock. You can specify whether the user needs to perform a recount of the medication, and whether they need to validate the return by entering their credentials.

Filling a prescription in Stock mode

When you fill a prescription for a medication that is being tracked, that quantity will be subtracted from the Quantity on Hand (QOH).

Pourable medications

1. Scan the prescription label, or enter the prescription number manually.
2. If prompted, confirm your ID.
3. Scan the medication's UPC label or enter the UPC code manually.
4. Pour the medication until you reach the correct count.
5. Remove the tray, pour the pills into a vial, then return the tray.
6. If prompted, perform a recount.

Back count

If **Back Count Required** is On, you will be prompted to verify the remaining open stock after you fill an order for a Scheduled drug.

Tap **Yes**, then pour the remaining stock to count it.

If the back count does not match the expected **Open** quantity, a warning message will be displayed at each fill for that 11-digit NDC until the back count discrepancy is resolved.

Non-pourable medications

1. Scan the prescription label, or enter the prescription number manually.
2. If prompted, confirm your ID.
3. Scan the medication's UPC label or enter the UPC code manually.
4. Continue scanning packages until the **Scan Package** screen changes to the **Scan** screen.

Check count

If **Check Count** is On, the prescription will be added to the **Fill Queue** and will be highlighted in yellow.

1. Tap **View Orders**, then tap the prescription to check.
2. Scan the prescription label, or enter the prescription number manually.
3. If prompted, confirm your ID.
4. Pour pills from vial to complete the check count, or scan the medication packages to confirm the correct number.
5. If prompted, perform a check count recount.

Adding a medication to stock

> **IMPORTANT:** Make sure the KL1Plus is in Stock Mode, not Count Mode. If the top right of the screen shows **Stock**, then you're using Stock Mode. (If the image shows **Count**, tap on it, then tap **Stock**.)

If a medication is pourable, you can add it to your stock in any of three different ways: by pouring pills, by adding whole bottles, or by entering the count manually.

If a medication is not pourable, you can add it to your stock by adding whole packages or by entering the count manually.

1. Scan the medication's UPC code, or tap **Use Keypad** and enter the UPC code for the medication to add.
2. If prompted, confirm your ID.
   This setting can be changed in Settings > Inventory Settings > Inventory Access. See xref.
3. If prompted, enter the DEA222 order form number (for Scheduled medications).
   If you've already entered a DEA222 form, this number will be entered by default. Tap **Submit** to use the same number, or tap ⌫ **Clear** and enter a new form number.
   This setting can be changed in **Settings > Workflow Settings > Stock Inventory**. See *Stock Inventory* on page 40.
4. If prompted, enter the invoice number (for Scheduled medications).
   If you've already entered an invoice number, it will be entered by default. Tab **Submit** to use the same number, or tap ⌫ **Clear** and enter a new number.
   This setting can be changed in **Settings > Workflow Settings > Stock Inventory**. See *Stock Inventory* on page 40.
5. Add your medication to inventory:
   Add whole bottles
   a. Tap **Add Bottle(s)** or **Add Package(s)**.
   b. Type the number of bottles or packages of this medication to add to your stock, then tap **Enter**.
   Add by pouring
   a. Pour the pills to be counted into the funnel.
   b. When you have poured all the pills, remove the tray and add the pills to your stock.
   c. Replace the tray.
   Enter the medication count manually
   a. Tap **Add Manually**.
   b. Type the number of pills or single doses of non-pourable medication that you are adding, then tap **Enter**.

You can now scan another UPC code to continue adding stock.

Auditing and adjusting stock

The Quantity on Hand (QOH) count for a medication is the number of individual units, whether they are packaged or not.

The Open count for a medication is the number of individual units remaining in a package or bottle. This value can't be greater than the package size of the medication.

For non-pourable medications these values are usually the same.

Confirming stock count

You can confirm the physical count of a medication against the value held by the KL1Plus.

To perform this confirmation, you should manually count your stock on hand.

To confirm the stock count:

1. Tap **View Inventory**.
   The screen will display your recent inventory transactions.
2. Tap the medication that you want to confirm.
3. Tap **Audit Selected**.
4. Use the keypad to enter the value from your manual stock count, then tap **Audit Matched**.
   If the **Audit Matched** button is not available, this means the amount you entered does not match the Quantity on Hand. You should re-count your stock, then perform a stock adjustment if necessary.
5. After you tap **Audit Matched**, you'll be prompted to confirm that the counts match. Tap **OK** if they match, or **Cancel** to return to the **Adjustment** screen.
6. If prompted, confirm your ID.

Tap ← **Back** to return to the **Scan** screen.

Adjusting a medication stock count

To adjust stock count for a medication:

1. Tap **View Inventory**.
   The screen will display your recent inventory transactions.
   You can tap **Show By Med** or **Show By Bottle** to view actual stock counts.
2. Tap the medication that you want to adjust.
3. Tap **Audit Selected**.
   Below the picture of the medication is the Quantity On Hand (**QOH**), and the number of individual units (**Open**).
4. Use the keypad to enter the adjustment amount, then tap either **Adjust by + [amount]** to adjust your stock count up, or **Adjust by – [amount]** to adjust your stock count down.
   You can also tap **Count** and use the KL1Plus to count the pills in the stock adjustment (pills you are removing, or pills you are adding).
5. Tap the reason that you are adjusting the stock count, or tap **Enter Adjustment Reason Manually** and enter the reason for the adjustment.
6. Tap **Yes** to confirm your stock adjustment.
7. If prompted, confirm your ID.

When you are done adjusting stock, tap ← **Back** to return to the **Scan** screen.

Setting the Open medication count

You can adjust the number of unpackaged medication units in your inventory.

> **NOTE:** Adjusting the **Open** count will also adjust the Quantity on Hand (**QOH**).

To change the **Open** count:

1. Tap **View Inventory**.
   The screen will display your recent inventory transactions.
   You can tap **Show By Med** or **Show By Bottle** to view actual stock counts.
2. Tap the medication that you want to adjust.
3. Tap **Audit Selected**.
   Below the picture of the medication is the Quantity On Hand (**QOH**), and the number of individual units (**Open**).
4. Use the keypad to enter the corrected **Open** quantity, then tap **Set Open** to adjust your stock counts.
   You can also tap **Count** and use the KL1Plus to count the pills.
5. Tap the reason that you are changing the **Open** count, or tap **Enter Adjustment Reason Manually** and enter the reason for the adjustment.
6. Tap **Yes** to confirm your stock adjustment.
7. If prompted, confirm your ID.

When you are done adjusting stock, tap ← **Back** to return to the **Scan** screen.

Inventory transactions

Every prescription you fill, every drug order you receive, every prescription returned to stock, and every audit adjustment you make creates an inventory transaction record.

To view the inventory transaction records, tap **View Inventory**.

Tap any record to see details for that transaction, then tap:

- **Audit Selected** to adjust stock counts for that medication. See ***Auditing and adjusting stock*** on page 34.
- **Edit DEA222** to add or edit the DEA 222 form number for the transaction. See ***Edit DEA222*** on page 38.
- **Edit PO#** to add or edit the Invoice number for the transaction. See ***Edit PO#*** on page 38.

Show by Med

Tap **Show By Med** to see the Quantity on Hand for each medication being tracked.

Tap an entry in the list, then tap **Audit Selected** to adjust the stock quantity for that medication. See ***Auditing and adjusting stock*** on page 34.

Show by Bottle

If your medication labels use QR codes or another 3D code, then scanned bottle information includes a serial number to track that specific bottle, as well as expiration date information.

The KL1Plus records that information as part of your stock, and when you use a serialized bottle, that bottle is included in the "open" count for that medication.

If your medication labels use 2D UPC barcodes, there is no serial number, so the KL1Plus can't track individual bottles.

Tap **Show by Bottle** to see individual serialized bottle information, and the remainder of un-serialized bottles in a single entry.

Tap an entry in the list, then tap **Audit Selected** to adjust the stock quantity for that medication. See ***Auditing and adjusting stock*** on page 34.

Search

You can search the inventory transactions for transactions matching certain criteria.

> **TIP:** **Search** only returns transactions where all the criteria you select are true. If you specify an **NDC** and a **UserID**, the returned transactions will include only those made by the specified user with drugs matching the NDC you entered.

1. Tap **Search**.
   If there are existing search criteria, you can continue with them.
   To start with new search criteria, tap **Clear All**.
2. To search only current transactions, set **Use Current Inventory** to **On**.
   To search current and archived transactions, set **Use Current Inventory** to **Off**.
3. Enter one or more search criteria:
   - **NDC (National Drug Code):** Enter all or a portion of the 11-digit code for a drug. If you enter only a part of the code, Search will only return transactions where those digits are in any position in the NDC.
   - **Rx:** Enter all or part of a prescription number. Search will only return transactions where the numbers you entered are in any position in the prescription number.
   - **Audits/Adjustments:** Select Any to have Search look at all transaction types, or choose a specific transaction type from the menu.
   - **Matching UserID:** Enter a User ID (the whole ID, not just part of an ID). Search will return transactions made by the specified user.
   - **Drug Name:** Enter all or part of a drug name. If you enter only part of the name, Search will return transactions where the text you entered is in the drug name.
   - **Starting Date:** Choose a date to limit transactions to those made on or after a specific date.
   - **End Date:** Choose a date to limit transactions to those made on or before a specific date.
   - **DEA222 or PO:** Enter all or part of a DEA Form 222 number or an invoice or purchase order number. Search will return transactions where the digits you entered are in any position within a transaction's DEA Form 222 or Invoice number.
4. When you have specified your search criteria, tap **Apply Filters**.

The KL1Plus will display all transactions matching your criteria.

Once you have performed a search, you can:

- Tap an entry to review details of that transaction.
- Tap **Search** to enter additional search criteria.

Edit DEA222

To add or change the DEA 222 form number associated with a transaction, tap **Edit DEA222**.

If there is a DEA 222 form assigned to the transaction, it will appear in the edit field.

Edit the existing value or type a new value, then tap **Submit**.

If you don’t want to change or add the form number, tap ← **Back**.

> **NOTE:** There is no way to remove the DEA 222 form number from a transaction.

Edit PO#

To add or change the purchase order or invoice number associated with a transaction, tap **Edit PO#**.

If there is a P.O. or invoice assigned to the transaction, it will appear in the edit field.

Edit the existing value or type a new value, then tap **Submit**.

If you don’t want to change or add the number, tap ← **Back**.

> **NOTE:** There is no way to remove the PO/Invoice number from a transaction.

Return to stock

When you perform a Return to Stock operation, the quantity for a filled prescription will be added to the Quantity on Hand count for the medication.

> **NOTE:** You can perform a return in either Stock Mode or Count Mode.

1. On the **Scan** screen, tap **Find Rx**.
2. Scan or enter the prescription number.
3. Tap the appropriate **Choose** button (**Archived** or **Current**).
4. Tap the prescription.
5. Tap **Return to Stock**.
   To cancel before pouring, tap ← **Back**, then tap **Cancel Return to Stock**.
6. Pour the vial contents to confirm the correct count.

Administration

The KL1Plus offers many settings for user access and for system behavior.

To access **Settings**, tap ← **Back** until you reach the **Logout** screen, then tap **Settings**.

- If the User System is turned Off, the **Settings** screen will be displayed immediately.
- If the User System is turned On, then you will be prompted to validate your access to the **Settings** screen. You can scan your fingerprint or scannable card (if these are set up for your account), or tap **Use Keyboard** to enter your User ID and Password.

> **NOTE:** If a different user validates **Settings** access than was logged in, then the new user will be logged in, and the settings displayed will be appropriate for the new user.

The User System and Permission Groups

If you have the User System turned on, there are settings related to users and what they can do with the KL1Plus.

When you create a KL1Plus user, you assign them to a permission group. This group determines what the user can and can't do when accessing the KL1Plus. Each user belongs to exactly one permission group.

By default, there are three groups: **Administrator**, **Pharmacist**, and **Technician**.

Administrator users can change group permissions and even add new groups with different sets of permissions.

Pharmacist users can modify System Settings > Workflow Settings, System Settings > Barcode Configuration, Your Settings > Register Fingerprint, Your Settings > Register Scan Card, Your Settings > Change Password, Inventory Settings > Adjust Reasons, Med Settings > Drugs, Med Settings > Exception Meds, and Rx Settings > Remove Rx.

Technician users can modify their system login settings: Your Settings > Register Fingerprint, Your Settings > Register Scan Card, and Your Settings > Change Password.

If you do not have the User System turned on, several settings will be unavailable. These will be grayed out and marked.

System Settings

In **System Settings** you configure the basic operational settings of the KL1Plus software.

- **Workflow Settings:** These settings determine what happens when a user processes a prescription and cleans the system.
- **Data Removal:** This determines how long data is retained after it is archived.
- **Start Mode Configuration:** Set whether KL1 Mode is available, and which mode is presented by default.
- **Audio Configuration:** Set audio alerts for different events.
- **Barcode Configuration:** Identify the different elements of your pharmacy's prescription barcode.
- **Set System Time:** Set the time zone, time, and date of the KL1Plus.
- **Archiving:** Define when prescriptions are archived.
- **Update:** Checks for a newer version of the KL1Plus software.

Workflow Settings

Available to: Administrators, Pharmacists

This is where you set important requirements for different KL1Plus operations for each Permission Group.

- The **Default** group settings are applied when you create a new Permission Group (see ***Adding a group*** on page 54.
- If you change a setting in the **Default** group, that setting is changed in all the other groups as well.
- If you change a setting in any other group, it is only changed for that group.
- To set a group's settings to the same as the **Default** group settings, select the group then tap **Restore Defaults**.

> **IMPORTANT:** Each of the following groups of settings can be adjusted separately for each permission group. Make sure that your permission groups are set correctly.

Stock Inventory

These settings determine some KL1Plus behaviors when in Stock Mode.

Setting	Value	Description
Recount Medications	OFF	Users do not need to recount any medications. The **Recount Prompt** setting is not applicable if this is OFF.
	Recount Marked And Scheduled Meds	Users must recount all scheduled medications as well as any other medications marked as needing a recount. (See ***Viewing and modifying an existing medication*** on page 62.) Recount enforcement depends on the **Recount Prompt** setting.
	Recount Scheduled Meds ONLY	Users must recount all scheduled medications. Recount enforcement depends on the **Recount Prompt** setting.
	Recount ALL Meds	Users must recount all medications. Recount enforcement depends on the **Recount Prompt** setting.
Recount Prompt	Recount Prompt Off	Recount is not required.
	Required	Recount is required; there is no prompt offering the option to do a recount.
	Prompt Optional	Recount is optional; the user will be asked whether they want to verify the count.
DEA Form # 222 Prompt	Off	The user will not be prompted for a DEA 222 form.
	On	When this setting is On, the user will be prompted to enter the DEA 222 form number when performing a Stock Mode action involving a Scheduled medication..
Invoice Prompt	Off	The user will not be prompted for a purchase order or invoice number.
	On	Turn this On to have the KL1Plus prompt for the invoice number for a received medication when performing a Stock Mode operation.

Setting	Value	Description
Pour Timeout (seconds)	(number)	Enter the number of seconds that the KL1Plus should wait for the user to start pouring pills. If this time expires, the KL1Plus will display an error. To turn the timeout Off, set this value to 0 (zero).The timeout will only cause an audio alarm if you also enable a **Pour Timeout** alarm in **Audio Configuration** (see *Audio Configuration* on page 45).

Process Rx

These settings determine some of the options allowed when filling a prescription.

Setting	Value	Description
Recount Medications	Off	Users do not need to recount any medications. The **Recount Prompt** setting is not applicable if this is Off.
	Recount Marked And Scheduled Meds	Users must recount all scheduled medications as well as any other medications marked as needing a recount. (See ***Viewing and modifying an existing medication*** on page 62.) Recount enforcement depends on the **Recount Prompt** setting.
	Recount Scheduled Meds ONLY	Users must recount all scheduled medications. Recount enforcement depends on the **Recount Prompt** setting.
	Recount ALL Meds	Users must recount all medications. Recount enforcement depends on the **Recount Prompt** setting.
Recount Prompt	Recount Prompt Off	Recount is not required.
	Required	Recount is required; there is no prompt.
	Prompt Optional	Recount is optional; the user will be asked whether they want to verify the count.
Back Count Medications	OFF	User is not required to count remaining stock after filling a prescription. The **Back Count Prompt** setting is not applicable if this setting is OFF.
	Back Count Marked And Scheduled Meds	Users must back count all scheduled medications as well as any other medications marked as needing a recount. (See ***Viewing and modifying an existing medication*** on page 62.) Back count enforcement depends on the **Back Count Prompt** setting.
	Back Count Scheduled Meds ONLY	Users must back count all scheduled medications. Back count enforcement depends on the **Back Count Prompt** setting.
	Back Count ALL Meds	Users must back count all medications. Back count enforcement depends on the **Back Count Prompt** setting.
Back Count Prompt	Back Count Prompt Off	Back count is not required.
	Required	Back count is required. The user will not be given the option of performing the back count.
	Prompt Optional	Back count is optional. The user will be asked whether they want to count remaining stock.

Setting	Value	Description
Check Count	Off	A check count is not required.
	Check Count Marked And Scheduled Meds	Before the prescription is distributed to the patient, the count must be checked. This applies only to scheduled medications and any others marked for checking.
	Check Count Scheduled Meds Only	Before the prescription is distributed to the patient, the count must be checked. This applies only to scheduled medications.
	Check Count All Meds	Before the prescription is distributed to the patient, the count must be checked. This applies to all medications.
Check Recount	Off	The check count doesn’t need to be recounted.
	Required	The check count must be recounted.
	Prompt Optional	Recounting the checked count is optional; the user will be asked whether they want to verify the check count.
Scan Override	Override Off	Users cannot scan a different medication to substitute for the prescribed medication.
	Override On	Users are offered the option to override the prescribed medication and substitute the med they scanned.
	Override Rph	Only registered pharmacist (Rph) users will be offered the option to override the prescribed medication.
	Override Rph Check Fp	A pharmacist user can use their fingerprint to approve a scan override for any user. (Obviously the pharmacist user needs to have a fingerprint added to their account.)
Out of stock setting	Do Nothing	If stock count for a medication is 0 (or below), the user is allowed to fill a prescription anyway.
	Warn, fill only	If stock count for a medication is 0, the user will be warned but will still be allowed to fill a prescription.
	Warn, fill and check count	If stock count for a medication is 0, the user will be warned, will be allowed to fill the prescription, and will be required to recount the prescription.
	Stop fill	If stock count for a medication is 0, the user will not be allowed to fill a prescription.
Fingerprint At Fill	On	Allows users to confirm a prescription with their fingerprint (if this is configured for their account).
	Off	The fingerprint confirmation option is not available.
Keypad At Fill	On	Allows users to confirm a prescription with their User ID and Password.
	Off	The User ID/Password confirmation option is not available.
Scan Card At Fill	On	Allows users to confirm a prescription with their scan card (if one is configured for their account).
	Off	The scan card confirmation option is not available.
Pour Timeout (seconds)	(number)	Sets the amount of time allowed to start pouring a medication (for filling a prescription) after scanning its UPC barcode. If the user doesn’t start pouring within this interval, the KL1Plus will display a message and sound an alarm. Enter 0 to have no timeout warning. The timeout will only cause an audio alarm if you also enable a **Pour Timeout** alarm in **Audio Configuration** (see ***Audio Configuration*** on page 45).

Audit Inventory

These settings affect whether a user can adjust medication stock count. See ***Auditing and adjusting stock*** on page 34.

- **Pour Timeout (seconds):** Sets the amount of time to start pouring a medication when counting for an adjustment. Set this to 0 to have no timeout.
- **Allow Adjustment:** Turn this On to allow users to adjust or verify medication stock counts.

Return to Stock

These settings determine some KL1Plus behaviors when performing a Return to Stock (RTS) operation.

Setting	Value	Description
Recount Medications	Off	Users do not need to recount any medications. The **Recount Prompt** setting is not applicable if this is Off.
	Recount Marked And Scheduled Meds	Users must recount all scheduled medications as well as any other medications marked as needing a recount. (See ***Viewing and modifying an existing medication*** on page 62.) Recount enforcement depends on the **Recount Prompt** setting.
	Recount Scheduled Meds ONLY	Users must recount all scheduled medications. Recount enforcement depends on the **Recount Prompt** setting.
	Recount ALL Meds	Users must recount all medications. Recount enforcement depends on the **Recount Prompt** setting.
Recount Prompt	Recount Prompt Off	Recount is not required.
	Required	Recount is required; there is no prompt.
	Prompt Optional	Recount is optional; the user will be asked whether they want to verify the count.
Fingerprint At Fill	On	Allows users to confirm a return to stock with their fingerprint (if this is configured for their account).
	Off	The fingerprint confirmation option is not available.
Keypad At Fill	On	Allows users to confirm a return to stock with their User ID and Password.
	Off	The User ID/Password confirmation option is not available.
Scan Card At Fill	On	Allows users to confirm a return to stock with their scan card (if one is configured for their account).
	Off	The scan card confirmation option is not available.
Pour Timeout (seconds)	(number)	Sets the amount of time allowed to start pouring a medication (for a return to stock) after scanning its UPC barcode. If the user doesn't start pouring within this interval, the KL1Plus will display a message and sound an alarm. Enter 0 to have no timeout warning. The timeout will only cause an audio alarm if you also enable a **Pour Timeout** alarm in **Audio Configuration** (see ***Audio Configuration*** on page 45).

NOTE: If none of the "ID at Fill" settings are On, users will not be required to identify themselves when performing a Return to Stock.

Requires Cleaning

These settings determine how a user can confirm when they have cleaned the KL1Plus.

> **NOTE:** If all three options are turned off, no confirmation will be required after a cleaning.

Setting	Value	Description
Fingerprint At Cleaning Complete	On	Allows users to confirm that the cleaning has been completed using their Fingerprint (if this is configured for their account).
	Off	The Fingerprint cleaning confirmation option is not available.
Keypad At Cleaning Complete	On	Allows users to confirm that the cleaning has been completed by entering their User ID and Password.
	Off	The User ID/Password cleaning confirmation option is not available.
Scan Card At Cleaning Complete	On	Allows users to confirm that the cleaning has been completed using their Scan Card (if this is configured for their account).
	Off	The Scan Card cleaning confirmation option is not available.

Data Removal

Available to: Administrators

This setting specifies how long data is kept in the system archive.

Tap the menu and choose the new time limit, then tap ← **Back**.

Start Mode Configuration

Available to: Administrators

Here is where you set the mode of operation when the KL1Plus starts up, and what modes are available.

Tap the menu and choose the startup mode, then tap ← **Back**.

- **Mixed Mode KL1 Start:** The device starts in KL1 Mode, and KL1 Mode is available to all users from the **Logout** screen.
- **Mixed Mode Scan Start - KL1 Mode Admin Not Required:** The device starts in **Scan Mode**. KL1 Mode is available to all users from the **Logout** screen.
- **Scan Only Mode:** The device starts in **Scan Mode**. KL1 Mode is not available.
- **Mixed Mode Scan Start - KL1 Mode Admin Required:** The device starts in **Scan Mode**. KL1 Mode is available from the **Logout** screen. If a non-administrator user attempts to use KL1 Mode, they will be prompted for authorization from an administrator user.

> **NOTE:** If the User System is turned off, authorization is not required. See ***User System Enablement*** on page 52.

Audio Configuration

Available to: Administrators

Here is where you set the audio alerts that happen for different operations.

Tray Alarm Timeout: This determines how long after a pour the tray can remain in the KL1Plus before it sounds a warning beep.

For other settings, tap the individual menu and choose the tone that the KL1Plus will play for each condition. Tap the 🔊 speaker icon next to a menu to hear the tone selected for that condition.

> **NOTE:** The setting **Audio Off** means that no audio will play for the specified condition.

Condition	Meaning	Condition	Meaning
No Beep		**General Success**	An activity completed successfully
General Error	There was an error	**General Warning**	
UPC Match	The scanned UPC code matched what was expected	**UPC Mismatch**	The scanned UPC code did not match what was expected
Overcount	You poured too many pills	**Undercount**	You removed the tray before pouring the required number of pills
Unexpected Tablets	You poured pills when the KL1Plus was not expecting you to	**Overspeed**	You're pouring the pills too fast
Fingerprint Mismatch	The fingerprint scanned didn't match what was expected, or wasn't on file	**Rx Not Found**	The prescription was not found
Pour Timeout	The designated time to start pouring a medication has elapsed	**Before Recount**	
Before Stock Count		**Clean Count Warning**	
Manual Count Warning		**Rx Completed**	A count has been completed

Barcode Configuration

Available to: Administrators, Pharmacists

This describes the format of the pharmacy label barcode. A barcode consists of three elements: the National Drug Code (NDC), prescription number, and quantity.

> **IMPORTANT:** The barcode configuration is preset before the KL1Plus is shipped. Only use this option if it becomes necessary to change these settings.

00000000000123456799999

Figure 17: Barcode Example

A barcode represents encoded data; there is no correspondence between the bars and the digits of the code.

A pharmacy may print the encoded digits, with or without hyphens or spaces as separators, on the label near the barcode.

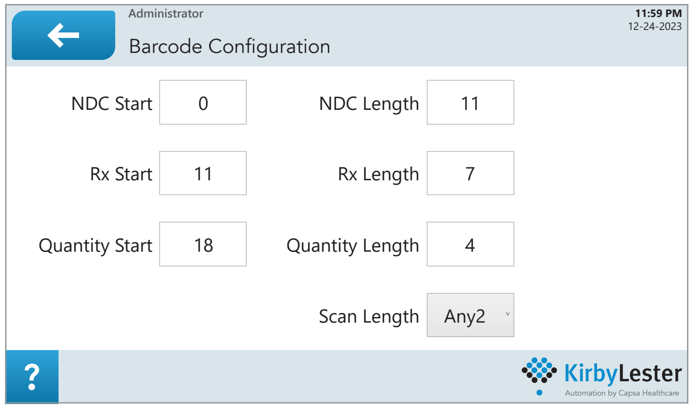


Figure 18: Barcode Configuration

If you need to update the Barcode Configuration, it might help to have a sample code on hand so that you can identify the different elements and the setting changes required.

The barcode is a series of digits that represent the NDC, the pharmacy's prescription number, and the number of pills in the prescription. In Figure 17 on page 45 the code is 0000000000012345679999.

In this code:

- the NDC is 00000000000;
- the prescription number is 1234567;
- the quantity is 9999.

When describing your code, you need to tell where in the code each element starts and how long it is. In the example code, the NDC starts at position 0 and is 11 digits long, the prescription number starts at position 11 and is 7 digits long, and the quantity starts at position 18 and is 4 digits long.

It is possible that your pharmacy labels have other digits that don't belong in any of these groupings. In that case, you would need to determine the start character and length of the relevant groups and enter those; when the KL1Plus scans a prescription barcode, it will ignore the characters outside these groups.

Set System Time

Available to: Administrators

The KL1Plus has a built-in clock and calendar that it uses to log different operations and to determine when to perform some automatic functions.

The clock and calendar are usually managed by the Windows operating system, but you can change their settings from the KL1Plus software.

Changing the time zone

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **System Settings**, then tap **Set System Time**.
3. Tap the menu showing time zones, then tap your time zone.
4. Tap **Set System Time Zone**.
5. In the confirmation message, tap **Yes**.

Changing the date and time

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **System Settings**, then tap **Set System Time**.
3. Tap **Manually Set System Time**.
4. To change the Year, Month, and Date, tap the Year in the blue header, then select the year, then the month, then the date.

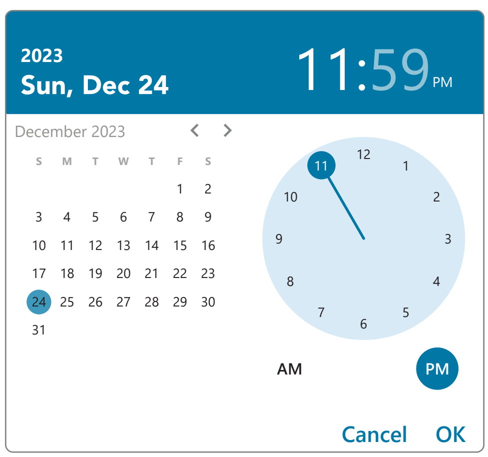


Figure 19: Set Date and Time

   You can tap the Date in the blue header to change just the month and date.
   You can also use the < and > arrows to skip backward or forward a month at a time.
5. To change the Hour, tap the hour value in the blue header, then tap the hour on the clock face.
   You can also drag the hour hand around the clock face to the correct time.
6. To change the Minutes, tap the minutes value in the blue header, then tap the minutes on the clock face.
   You can also drag the minute hand around the clock face to the correct time.
7. Tap the correct Meridiem Indicator (**AM** or **PM**) below the clock face.
8. When you have finished, tap **OK**.

Archiving

Available to: Administrators

These options determine when prescriptions are archived.

The time of the most recent archive is shown at the bottom left of the screen.

> **NOTE:** Once archived, a prescription will not appear in the **Filled Orders** list, and the prescription number is available for re-use.

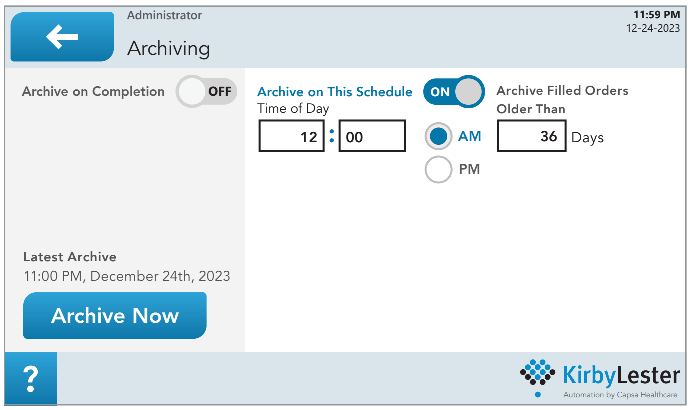


Figure 20: Archiving

Archive on Completion and **Archive on This Schedule** are mutually exclusive options: when you turn one on, the other is turned off automatically. (You can have both options turned off, and rely only on manually archiving prescriptions.)

To set archiving options:

1. Enter **Settings**.
   Tap [←] **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **System Settings**, then tap **Archiving**.
3. Turn on one of the following settings, or turn both off to cancel automatic prescription archiving:
   - **Archive on Completion:** Turn this on to have prescriptions automatically archived as soon as they are filled. When this option is turned on, a filled prescription will not appear in the **Filled Orders** list, because it will have been archived.
   - **Archive on This Schedule:** Turn this on to have prescriptions automatically archived at a specific time, once they are older than a set number of days.
     a. To set the time of day to archive your prescriptions, tap the **Hours** field and enter the hour, tap the **Minutes** field and enter the minutes, tap **AM** or **PM**, then tap **Save**.
     b. To set the number of days to wait before a filled prescription is archived, tap the **Older Than** field, enter the number of days, then tap **Save**.

Manually archiving prescriptions

You can archive prescriptions at any time, regardless of other archiving settings.

1. Enter **Settings**.
   Tap [←] **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **System Settings**, then tap **Archiving**.
3. Tap **Archive Now**.

Update

Available to: Administrators

This checks for updates to the KL1Plus software. If an update is available, you can tap **Update to Latest** and the KL1Plus will download and install the update. You will then need to log in (if the User System is turned on).

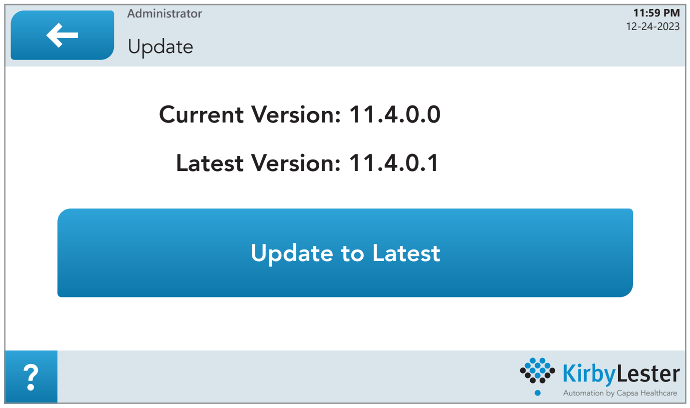


Figure 21: Update

The KL1Plus also checks for updates when you turn it on. If you log in as an administrator user, you can perform the update when you want to.

Your Settings

Available to: All users

> **NOTE:** These options are only available if the User System is On.

Each user can add, change, or remove their password, fingerprint, and scan card information that is used to identify the user to the KL1Plus.

To access your user settings, tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then tap the **Your Settings** tab on the left.

Register Fingerprint

Each user can register a single fingerprint, to simplify logging in to the KL1Plus.

> **TIP:** If an individual needs to log in to the KL1Plus with two different roles, they can set up different accounts and use different fingers to log in to each.

Adding your fingerprint

> **IMPORTANT:** The fingerprint scanning software retains a digital image of your fingerprint. If you are concerned about the security of your personal data, do not add your fingerprint to the KL1Plus.

1. Tap **Register Fingerprint**.
2. Tap **Start**.
3. Scroll the notice and tap **I Consent** to scan your fingerprint, or tap **Cancel** then tap ← **Back** to abandon scanning your fingerprint.
4. Press your finger four times on the fingerprint scanner.

If you receive an error, tap **Try Again** and re-scan your finger, or tap ← **Back** to return to **Your Settings**.

When you have finished scanning your fingerprint, tap ← **Back** until you reach the **Scan** screen.

Replacing your fingerprint

To replace an existing fingerprint scan:

1. Tap **Register Fingerprint**.
2. Tap **Start**.
3. Scroll the notice and tap **I Consent**.
   To cancel, tap **Reset**, tap **No** in the confirmation window, then tap ← **Back** to return to **Your Settings**.
4. Press the finger that you want to register to the scanner pad.
   You need to scan the same finger four times.

If you receive an error, tap **Try Again** and re-scan your finger, or tap ← **Back** to return to **Your Settings**.

When you have finished scanning your fingerprint, tap ← **Back** until you reach the **Scan** screen.

Removing your fingerprint

To remove your fingerprint from the KL1Plus:

1. Tap **Register Fingerprint**.
2. Tap **Start**.
3. Tap **Reset**.
   If there is a **Cancel** button but no **Reset** button, then you haven’t registered a fingerprint. Tap **Cancel**, then tap ← **Back** to return to **Your Settings**.
4. To remove your fingerprint, tap **Yes** in the **Reset finger records** confirmation screen, then tap ← **Back** to return to **Your Settings**.

Register Scan Card

You can use a barcode to log in to the KL1Plus. The barcode can be on an ID card or just printed on paper.

The KL1Plus barcode scanner won't work with a highly reflective surface, such as a phone screen.

> **NOTE:** Many states' driver's licenses have a barcode on the back. You can use this as your scan card to log in to the KL1Plus. Even though most of these codes resolve to numbers, if you have any concerns about personal security then you shouldn't use this to identify yourself to the KL1Plus.

> **TIP:** The **Libre Barcode Project** (https://graphicore.github.io/librebarcode/) can help you generate and print scannable barcodes in many formats.

Adding a scan card

1. Tap **Register Scan Card**.
2. Hold the barcode under the barcode scanner.
   You can also tap the **Scan Card** field and use the keypad to enter the scan code.
3. Tap **Register Scan Card**.
4. Tap **OK** in the confirmation window, then tap ← **Back** until you reach the **Scan** screen.

Removing a scan card

1. Tap **Register Scan Card**.
   The **Scan Card** field displays your current scan code.
2. Tap **Remove current registered card**.
3. Tap Yes to confirm removing the scan card, or **No** to retain the current scan card.
   - If you tap **Yes**, you will be returned to the **Register Scan Card** screen and the **Scan Card** field will be empty.
   - If you tap No, you will be returned to the **Scan Card** screen and your current scan code will still be displayed in the **Scan Card** field.
4. Tap ← **Back** until you reach the **Scan** screen.

Change Password

1. Tap **Change Password**.
2. Tap the **Previous Password** field.
3. Enter your current password and tap **Submit**.
4. Tap the **New Password** field.
5. Enter your new password and tap **Submit**.
6. Tap the **Confirm New Password** field.
7. Re-enter your new password and tap **Submit**.
8. Tap **Change Password**.

If you receive an error message, tap **OK** and fix the issue, or tap ← **Back** to return to **Your Settings** and cancel changing your password.

When you receive a password change confirmation message, tap **OK**, then tap ← **Back** until you reach the **Scan** screen.

Users

Available to: Administrators

If you decide to have individuals log in to the KL1Plus, the **Users** section is where you turn on this option, add users, and configure what operations users can perform.

User System Enablement

This is where you can turn the User System on or off.

When the User System is On, individuals will need to provide credentials (User ID and Password, fingerprint, or scan card) in order to access the KL1Plus.

When the User System is Off, the system always operates as though an administrator was logged in, without requiring additional credentials for any functions. Anybody with physical access to the KL1Plus can use the device.

The User System allows you to restrict access to certain functions and to track prescription fills and other activity.

To turn the User System On or Off, tap the switch.

- After you turn the User System On, you will need to log in to the system.
- After you turn the User System Off, you will be logged out, and the system will have open access to all features.

Auto Logout

This allows you to set a time limit for the KL1Plus to be idle before automatically logging out the user.

The Auto Logout is put on hold if there is a long delay while filling a prescription.

To set the automatic logout:

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Auto Logout**.
3. Tap the **Enter Logout** field, enter the logout time, then tap **Submit**.
   The logout time can be 0 (zero) to turn off the automatic logout, or anywhere between 30 seconds and 28,800 seconds (8 hours).

Group Permissions

No user with the ability to alter Group Permissions can change the Group Permissions for the **Administrator** group. Administrators always have access to all settings, and changing their Group Permissions might make some functions unreachable.

When a setting is turned on for a group, members of that group can perform the given activity.

For more information about group permissions, see ***The User System and Permission Groups*** on page 39.

Permission	Meaning	Permission	Meaning
Register Fingerprint	Users can add their fingerprint for faster login. (**Settings > Your Settings**; page 49)	**Workflow Settings**	Set required actions during prescription processing, and confirmation options after cleaning. (**Settings > System Settings**; page 40)
Cleaning Reminder	Set cleaning reminder options. (**Settings > Med Settings**; page 59)	**Clear Inventory Counts**	Allows the user to clear stored inventory counts. (**Settings > Inventory Settings**; page 57)
Inventory Access	Determines who can access inventory functions in Stock Mode. (**Settings > Inventory Settings**; page 57)	**Inventory Tracking Settings**	Turn Inventory Tracking on or off. (**Settings > Inventory Settings**; page 57)
Manual Pick	Determine whether the KL1Plus or the pharmacy management system determines the number of units of packaged, non-pourable medications to dispense. (**Settings > Med Settings**; page 61)	**Data Removal**	Specify how long data is retained in the archive. (**Settings > System Settings**; page 44)
Register Scan Card	Users can add a scan card to their account for faster login. (**Settings > Your Settings**; page 51)	**Reset Inventory**	Users can reset inventory counts. (**Settings > Inventory Settings**; page 57)
Remove Rx	Allows the user to remove specific prescriptions. (**Settings > Rx Settings**; page 66)	**Start Mode Configuration**	Set the scan options available at startup. (**Settings > System Settings**; page 44)
NDC Matching	Set requirement to consider or ignore the package size portion of a medication's NDC number. (**Settings > Med Settings**; page 61)	**Rx Display**	Specify settings for prescription number format and display. (**Settings > Rx Settings**; page 66)
Rx Expiration	Set the time before an unfilled or partially-filled prescription expires. (**Settings > Rx Settings**; page 66)	**User System Enablement**	Turn the User System On or Off. (**Settings > Users**; page 52)
Audio Configuration	Set audio alarms for different events. (**Settings > System Settings**; page 45)	**Auto Logout**	Specify if the KL1Plus logs the user out if it is idle for a set time. (**Settings > Users**; page 52)

Permission	Meaning	Permission	Meaning
Barcode Configuration	Set the numeric format for prescription barcodes. (**Settings > System Settings**; page 45)	**Change Password**	Users can change their login password. (**Settings > Your Settings**; page 51)
Drugs	Add, remove, and modify drug information. (**Settings > Med Settings**; page 61)	**Adjustment Reasons**	Add or remove reasons that the inventory might be adjusted. (**Settings > Inventory Settings**; page 58)
Group Permissions	Add, delete, and modify permissions for groups of users. (**Settings > Users**; page 53)	**Exception Meds**	Specify medications that are exceptions to some specific KL1Plus rules. (**Settings > Med Settings**; page 65)
Set System Time	Set the time and date used by the KL1Plus. (**Settings > System Settings**; page 47)	**Archiving**	Set prescription archiving options. (**Settings > System Settings**; page 48)
Update	Update the KL1Plus software. (**Settings > System Settings**; page 49)	**Manage Users**	Add, modify, and delete user accounts. (**Settings > Users**; page 55)

Modifying a group’s permissions

You can modify the permissions of any group except the Administrator group.

To modify permissions for a group:

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Group Permissions**.
3. Tap the group to modify.
4. Turn permissions on or off.

Changes you make take effect immediately.

Adding a group

To add a new permissions group:

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Group Permissions**.
3. Type the group name, then tap **Submit**.
4. Select each permission you want members of the new group to have.
   The list is long, so be sure to scroll to see all the available options.

When you have finished specifying the new group’s permissions, tap ← **Back** to return to the **Settings** screen.

Changing a group's name

To change a permission group's name:

1. Enter **Settings**.
   Tap **← Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Group Permissions**.
3. Tap the group name, then tap **Rename Group**.
4. Type the new group name, then tap **Submit**.

Deleting a group

You can only delete permission groups that you have created; the **Administrator**, **Pharmacist**, and **Technician** groups are permanent.

To delete a permission group:

1. Enter **Settings**.
   Tap **← Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Group Permissions**.
3. Tap the group name, then tap **Delete Group**.
4. In the confirmation message, tap **Yes**.
   If you can't delete the group, it is probably because users are assigned to it. Confirm that all users are assigned to other groups, then try again.

Manage Users

This is where you create, edit, and remove user accounts for people who need to access the KL1Plus.

Adding a user

1. Enter **Settings**.
   Tap **← Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Manage Users**.
3. Tap **Create New User**.
4. Tap the **User ID** field, enter the User ID, then tap **Submit**.
   The User ID is what the person uses to log in to the KL1Plus. It must be unique.
5. Tap the **User Name** field, enter the user's name, then tap **Submit**.
   This name is recorded in logs and displayed on screen when the user logs in.
6. Tap the **Password** field, enter the user's password, then tap **Submit**.
   The password needs to be at least 8 characters long. A user can change their own password after you create their account.
7. Tap the **Group** menu and select a permissions group for the user.
   The default groups are **Administrator**, **Pharmacist**, and **Technician**. You can create other groups with different permissions. See *Group Permissions Defaults* on page 77 for the default permissions for these groups.

8. Tap the **Check Count** menu and choose an option.
   This determines whether the user can perform a "check" count if a medication requires one.
   - **Not Allowed:** The user can't check medication counts.
   - **Allowed:** The user can check any medication counts except prescriptions they fill themselves.
   - **Own Allowed:** The user can check any medication counts, including prescriptions they have filled.
9. Tap **Save New User**.

Modifying a user

You can change a user's **Group** and **Check Count** settings, and reset their password.

To modify a user:

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Manage Users**.
3. Tap the user to modify.
4. Tap the **Group** menu to change their permissions group.
   See *Group Permissions Defaults* on page 77 for the default permissions.
5. Tap the **Check Count** menu to change their ability to check medication counts.
   - **Not Allowed:** They can't check counts.
   - **Allowed:** They can check any counts except their own.
   - **Own Allowed:** They can check any counts, including their own.
6. Tap **Reset Password** to reset the user's password.
   Their new password will be the same as their user name, including capitalization and special characters. You should encourage them to change it as soon as possible.

Removing a user

To remove a user:

1. Enter **Settings**.
   Tap ← **Back** until you reach the **Logout** screen, tap **Settings**, then confirm your login credentials.
2. Tap **Users**, then tap **Manage Users**.
3. Tap the user to remove, then tap **Delete Selected User**.
4. In the confirmation message, tap **Yes**.

Inventory Settings

Available to: Administrators, Pharmacists

Clear Inventory Counts

Available to: Administrators

This option will erase all physical inventory count data from the KL1Plus.

This data represents physical inventory counts of medications on hand.

You should perform this operation any time you are going to recount all of your pharmacy's inventory.

To clear inventory counts for all medications:

1. In **Settings**, tap **Inventory Settings**.
2. Tap **Clear Inventory Settings**.
3. At the confirmation screen, tap **OK**.

> **NOTE:** This only clears static physical inventory counts. It does not affect perpetual inventory maintained using Stock Mode. For that function, use **Reset Inventory**.

Inventory Access

Available to: Administrators

This determines who can access inventory functions in Stock Mode.

These settings are mutually exclusive; turning one setting on turns the other setting off.

- **Anyone can access Inventory:** Turn this on to allow all users to access inventory features in Stock Mode.
- **Inventory access by permission group:** Turn this on to reveal a series of switches for each permission group. Setting a permission group to On allows all users of that permission group to access inventory functions in Stock Mode.

Inventory Tracking Settings

Available to: Administrators

This allows you to determine what medications are tracked in perpetual inventory using Inventory Tracking Mode.

- **Tracking Off:** No medications are tracked. Stock Mode is unavailable.
- **Tracking On:** All medications are tracked.
- **DEA Only:** Only scheduled medications are tracked.

Reset Inventory

Available to: Administrators

Reset Inventory will archive all inventory transactions and rest all inventory counts to zero.

When you tap **Reset Inventory**, you'll be prompted to continue. Tap **Reset** to reset inventory levels, or **Cancel** to return to the **Inventory Settings** screen.

This feature is part of the **Inventory Tracking Mode**. If **Inventory Tracking Mode** is Off, **Reset Inventory** will have no effect.

Adjustment Reasons

Available to: Administrators, Pharmacists

When a user makes a manual adjustment to inventory counts, they'll be prompted to give a reason for the change.

You can provide a list of common reasons for the user to choose from. (They can also manually enter a reason.)

Besides the reasons, you can ask (or require) the user to include additional information about the prescription or the reason for adjusting it.

This feature is part of the **Inventory Tracking Mode**. If **Inventory Tracking Mode** is Off, **Adjustment Reasons** are not used.

Adding

1. Tap **Add New Adjustment Reason**.
2. Enter a short description of the reason (such as "Past expiration date") and tap **Submit**.

The new reason appears at the bottom of the list.

Removing

1. Tap a reason in the list.
2. Tap **Delete Selected Adjustment Reason**.
3. When prompted to delete the reason, tap **OK**.

Editing

1. Tap a reason in the list.
2. Tap **Edit Adjustment Reason**.

You can now:

- Tap **Edit Reason** to edit the text of the reason.
- Tap **Add Info Item** to select different pieces of information that a user can add to their adjustment reason.
    a. In the **Additional Information** list, tap an entry.
    b. To require the user to include this information when giving a reason for the inventory adjustment, set **Is Required** to **On**.
    c. Tap **Add Selected**.
    When you are done with the Additional Information list, tap ← **Back**.
- Select an information item in the list and tap **Delete Info Item** to remove it from the information a user can add to their reason for adjusting stock inventory.

When you are done editing the adjustment reason, tap ← **Back**.

Med Settings

Available to: Administrators, Pharmacists

This is where you can change settings for individual medications, add new medications, and schedule cleaning reminders.

Cleaning Reminder

Available to: Administrators

The KL1Plus can remind users to clean the device.

To display a cleaning reminder after a certain number of prescriptions have been filled:

1. Set **Trigger cleaning reminder** to **On**.
2. Tap the field **Trigger cleaning reminder after how many scripts**.
3. Enter a number and tap **Submit**.

The KL1Plus will show a message when the specified number of prescriptions have been filled. The user must tap the message and clean the device before continuing.

Figure 22: Cleaning Reminder

Cleaning checklist

The KL1Plus can display a checklist for the user to follow, complete with videos.

To display the checklist when a cleaning is required, set **Display the cleaning checklist** to **Yes**.

If this setting is turned off, the user will be prompted to confirm they have cleaned the machine.

When the checklist is displayed, the user must tap each step. The KL1Plus will show a short video of how to clean each part.

When the user has completed a step, they tap the next step. When they have completed the last step, they return the tray. This indicates to the KL1Plus that cleaning is complete, and the **Clean Now** message will be removed.

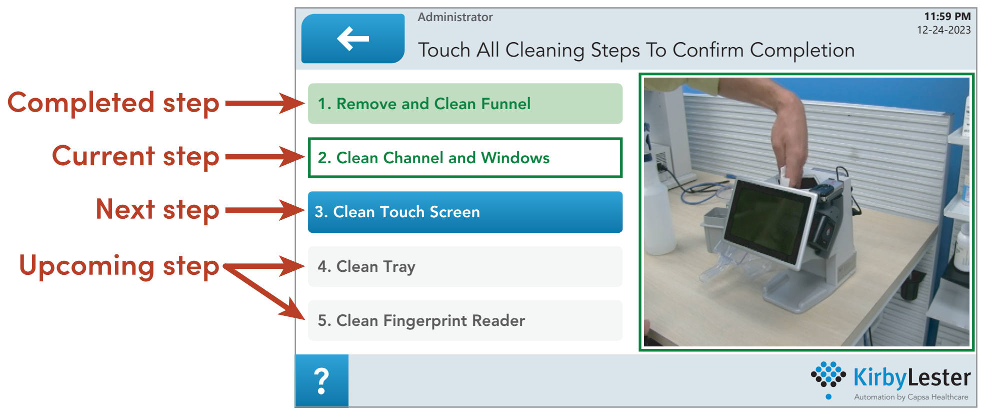


Figure 23: Cleaning Checklist

> **NOTE:** We recommend shutting down and unplugging the KL1Plus in order to clean it. Obviously, you can’t shut the device down and follow the checklist. Since the checklist and videos demonstrate the cleaning process, you could go through the checklist first, shut down the device, then proceed with cleaning it. For a detailed description of cleaning the KL1Plus, see ***Cleaning and Storage*** on page 72.

Getting confirmation when cleaning has been completed

In **Settings > System Settings > Workflow Settings > Requires Cleaning**, there are settings that will require the user to confirm the cleaning is complete. The settings are:

- **Fingerprint at Cleaning Complete**
- **Keypad at Cleaning Complete**
- **Scan Card at Cleaning Complete**

If any of these is turned **On**, the user who cleans the machine will need to confirm that they have cleaned the KL1Plus. Only the options that are On will be presented to the user.

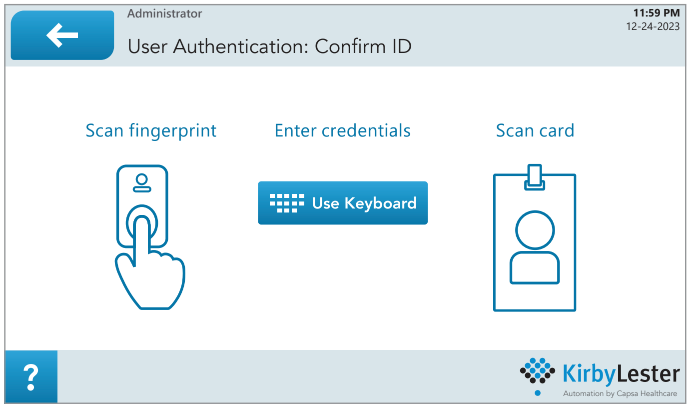


Figure 24: User Authentication Screen

Manual Pick

Available to: Administrators

This setting allows you to choose whether the KL1Plus or your pharmacy management system calculates the number of units of packaged, non-pourable medications to dispense. We recommended that you set this to KL1Plus.

- **KL1P:** Turn this on to have the KL1Plus calculate manual picks.
- **Pharmacy System:** Turn this setting on to have your pharmacy management system calculate manual picks.

> **NOTE:** Turning one setting on turns the other off.

NDC Matching

Available to: Administrators

This setting specifies whether the KL1Plus considers or ignores the package size component of the NDC number.

- **Match 11 Digits:** Turn this setting on to require the KL1Plus to match all 11 digits of the NDC, including the package size. You should use this option if you are using Inventory Tracking.
- **Match 9 Digits:** This setting allows the KL1Plus to ignore the package size digits in the NDC number.

> **NOTE:** Turning one setting on turns the other off.

Drugs

Available to: Administrators, Pharmacists

The **Drugs** screen lets you manage the medications that the KL1Plus knows about.

Med Update Service

Turn this on to allow the KL1Plus to automatically update its database of known drugs.

This is the best way to make sure that your system always has the latest drug information.

Substitutions Allowed

If this setting is turned on, then you can provide a substitute medication instead of the exact medication prescribed. (For example you might offer an alternative brand or a different form.)

Substitute medications need to be manually set up for each drug. See ***Setting medication substitutions*** on page 63.

Viewing and modifying an existing medication

To view an existing medication, scan its UPC code or enter the UPC or NDC code or the drug's name.

The KL1Plus will show the drugs that match your scan or entry in a list.

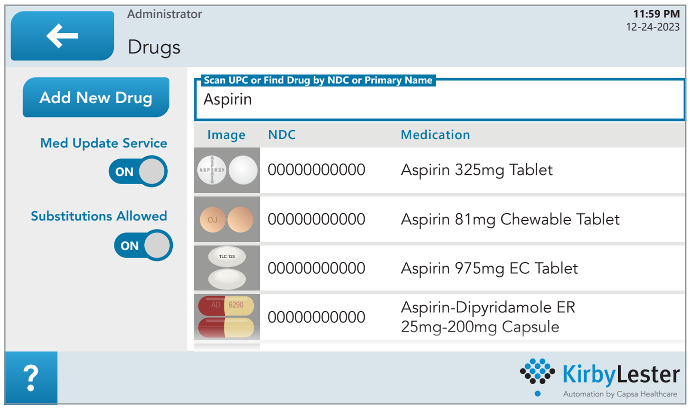


Figure 25: Find Drugs (by Name)

To view a medication, tap it in the list.

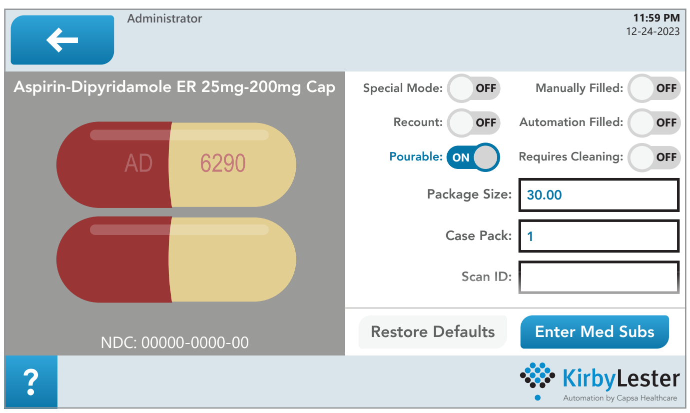


Figure 26: Medication Info Screen

The **Medication Info** screen includes some information about the drug that you can modify to better meet the needs of your organization. This includes adding substitute medications.

- **Special Mode:** Special Mode allows the KL1Plus to more accurately count pills with holes or them or with an unusual shape.
- **Recount:** This determines whether the medication needs to be recounted
- **Pourable:** This tells whether the medication is pourable (can be counted by the KL1Plus) or not.
- **Manually Filled:** This tells whether the medication should be counted manually on a tray instead of being poured through the KL1Plus.
  Changing this setting will also add or remove the medication on the **Exception Meds** list (see *Exception Meds* on page 65).
- **Automation Filled:** This tells if the medication is filled by vial filling automation rather than by hand.
  Changing this setting will also add or remove the medication on the **Exception Meds** list (see *Exception Meds* on page 65).
- **Requires Cleaning:** Turn this on if the KL1Plus should be cleaned after pouring this medication. This would be useful for any drug where cross-contamination could be an issue, such as an antibiotic.
  Changing this setting will also add or remove the medication on the **Exception Meds** list (see *Exception Meds* on page 65).
- **Package Size:** How many individual units (such as pills, for a pourable medication) are in a single package.
- **Case Pack:** How many packages (of the specified package size) are in a case.
- **Scan ID:** This is an alternate UPC code that will be accepted for filling a prescription for this medication.
  This is mainly used when the barcode on the bottle does not match the drug's listed UPC. You should enter the barcode from the bottle to address this issue.
  To enter an alternate barcode:
  1. Tap the **Scan ID** field.
  2. Enter the code or scan the secondary UPC label.
  3. Tap **Submit**.

  > **NOTE:** Do not use the **Scan ID** field to specify a medication that can be substituted for the original medication. See ***Setting medication substitutions*** below.

You can scroll the panel on the right to see more (non-editable) information about the drug.

To change any of the settings, tap the switch or tap the data field to edit the data.

Restore Defaults

If you want to reset any changes you have made to a medication's information, tap **Restore Defaults**.

Setting medication substitutions

To view or add substitute medications for the med you are viewing, tap **Enter Med Subs**.

The list shows the medications that can be substituted for the medication you are viewing.

- To add a new substitute medication, scan its UPC code or tap **Enter UPC or Scan**, then enter the UPC manually and tap **Submit**.
- To delete a substitute medication, tap its entry in the list, then tap **Delete Selected**. In the confirmation message, tap **Yes**.

Adding a medication to the KL1Plus database

Normally, you can rely on the KL1Plus to have a drug list that is updated regularly.

If your KL1Plus does not have internet access through your organization's network, you can add medications to its internal database manually.

To add a medication to the KL1Plus, you must be logged in as an administrator.

1. Tap ← Back until you reach the Logout screen, then tap Settings.
2. Tap Med Settings.
3. Tap Drugs.
4. Tap Add New Drug.
   In the Add New Drug screen, you will be prompted for the following information:

> **NOTE:** Entries preceded by an asterisk * are required.

- **Special Mode:** Turn this on if the pourable medication is translucent (like a gelcap), has a hole, or is oddly shaped.
- **Recount:** Turn this on to require the medication to be counted a second time.
- *** Pourable:** Whether the drug can be counted by pouring.
- Liquids, ointments, and inhalers are not pourable; this type of medication is called pickable.
- *** Drug Name:** This should include the drug name as well as strength and form (such as capsule or tablet).
- *** NDC:** (National Drug Code) This must be 11 digits.
- *** Package Size:** The number of items (such as pills) in a package.
- *** Case Pack:** The number of packages in a case.
- **Scan ID:** This is an alternate UPC code that will be accepted for filling a prescription for this medication.
  This is mainly used when the barcode on the bottle does not match the drug's listed UPC. You should enter the barcode from the bottle to address this issue.
- *** UPC:** (Universal Product Code) You can enter this manually or scan a barcode.
- *** DEA:** Enter the DEA classification: 0 for uncontrolled, or 1–5 for Schedule I through Schedule V.
- **Manufacturer:** Enter the manufacturer's name.
  If you enter at least 3 characters in the manufacture name and tap **Submit**, the screen will show a pop-up list of known manufacturers that start with the characters you entered. Choose the manufacturer from the list.
  To see the list of all manufacturers, do not enter anything and tap **Submit**.
  If the manufacturer is not listed, you can enter the whole name, and when you save the new drug's information, the new manufacturer will be added to the list of manufacturers.
- **Dosage Form:** Enter the dosage type.
  If you enter at least 3 characters and tap **Submit**, the screen will show a pop-up list of forms that start with the characters you entered.
  To see all dosage forms, do not enter anything and tap **Submit**
- **Color:** Enter the color of the medication.
- **Package Description:** Enter a description of the packaging and its contents.
  To see an example before you enter your own, look up a common drug or a drug that is similar to the one that you are adding.
- **Imprint 1:** Enter the information imprinted on the first side of the medication.
- **Imprint 2:** Enter the information imprinted on the other side of the medication.

Review all the information. Make any necessary changes, then tap **Save New Med**.

Exception Meds

Available to: Administrators, Pharmacists

> **NOTE:** Adding or removing a medication on any of the exception lists will also change the equivalent setting for the medication. For example, adding a medication to the **Cleaning Meds** list will also turn on the **Requires Cleaning** setting for the medication. See ***Viewing and modifying an existing medication***.

You can specify that some medications need special handling:

- **Cleaning Meds** require the KL1Plus to be cleaned after they are poured through the unit. This includes cross-contamination drugs such as an antibiotic.
- **Automation Filled Meds** are those filled using a vial filling automated device. The KL1Plus will alert a user not to fill these medications by hand.
- **Manual Count Meds** should not be poured through the KL1Plus; they should be manually counted on a tray instead. This could include any translucent medication that the KL1Plus could not count accurately.

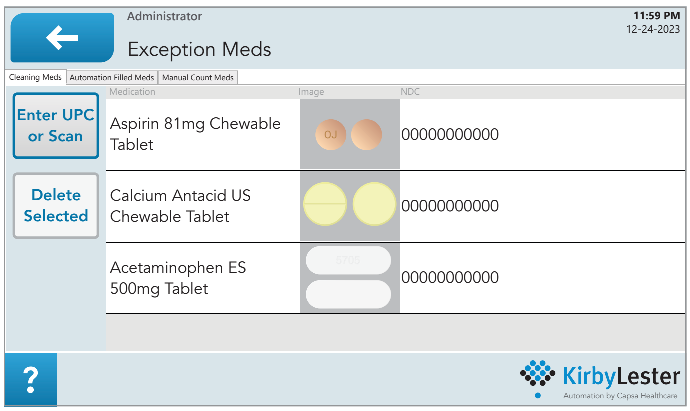


Figure 27: Exception Meds

To add a medication to an exception list:

1. Tap the tab at the top of the screen corresponding to the type of exception you would like to add.
2. Scan the UPC code for the drug you want to add.
   To enter the UPC code manually, tap **Enter UPC or Scan**.
3. If there is more than one NDC associated with the scanned UPC code, the KL1Plus will prompt you to add them all.
   You should choose to add all, so that all packages of the medication are included in your exception. (If you respond **No**, only the first matching NDC will be added.)

To remove a medication from the list:

1. Tap the medication in the list to select it.
2. Tap **Delete Selected**.
3. In the confirmation message, tap **Yes**.

Rx Settings

Available to: Administrators, Pharmacists

Remove Rx

Available to: Administrators, Pharmacists

This allows you to remove a prescription from the active prescriptions list.

1. Tap the **Enter Rx** Field.
2. Enter the exact prescription number, then tap **Submit**.
3. At the confirmation prompt, tap **Yes**.

Rx Display

Available to: Administrators

- **Show Rx and Tx:** Turn this On to show both Prescription and Transaction numbers when filling a prescription. Turn this Off to show just the Prescription number.
- **Is Alpha numeric allowed:** Turn this on to allow letters and digits to be used in the prescription "number".
  If this is On, the full alphanumeric keypad will be used for manual prescription entries. If this is Off, the numeric keypad will be used.

Rx Expiration

Available to: Administrators

Using this option allows prescriptions in the fill queue to expire so that the queue does not continue to grow. If a prescription expires, it is moved to the Filled Orders list, and will be archived according to the archiving schedule.

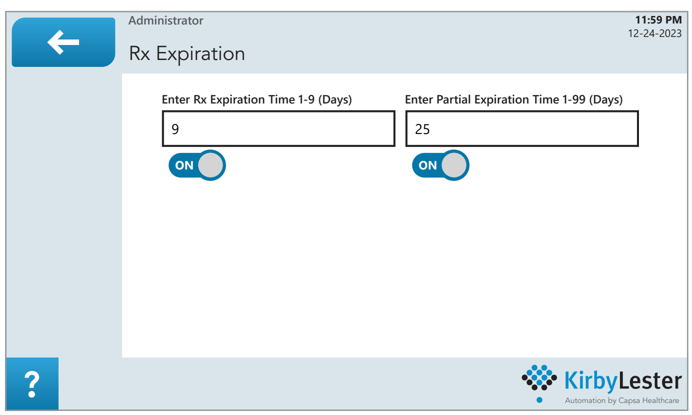


Figure 28: Rx Expiration

To set an expiration time:

1. Set the **Rx Expiration Time** switch to **On**.
2. Tap the **Enter Rx Expiration Time** field, enter the number of days before a prescription expires (from 1 to 9), then tap **Submit**.

You can also set an expiration time for partially-filled prescriptions.

1. Set the **Partial Expiration Time** switch to **On**.
2. Tap the **Enter Partial Expiration Time** field, enter the number of days before expiration (from 1 to 99), then tap **Submit**.

The Reports Dashboard

Your KL1Plus hosts a web application that can generate a variety of reports:

- **Monthly Audit Reports:** Generated every month for every tracked medication. Audit and make notes about every medication in your perpetual inventory over the previous month.
- **Transaction Audit Reports:** Generated every time the number of transactions for a medication reaches a specific threshold (set by default to 30). You can audit and make notes about the transactions for this medication.
- **Summary Reports:** Generated on demand. Lists current Quantity on Hand for every tracked medication.
- **Detailed Inventory Reports:** Generated on demand. This report lists all transactions for selected medications over a specific period.
- **Exceptions Reports:** Generated on demand. Shows non-dispense activities for a tracked medication over a specific period.

To access the dashboard, use a web browser on another device (computer, tablet, or phone) on the same network as the KL1Plus.

In the address bar of the browser, enter **https://** followed by the IP address of the KL1Plus followed by a colon and the number 5001. Example: **https://123.45.67.89:5001**.

FINDING YOUR KL1PLUS IP ADDRESS

1. Tap ← **Back** until you reach the **Logout** screen.
2. Tap **Close App**, then tap **OK**.
3. Tap at the bottom center of the screen to display the taskbar.
4. Tap the **Windows** icon at the bottom left of the screen, then tap the **Settings** icon.
5. In the **Windows Settings** window, tap **Network & Internet**.
6. In the right side of the window, tap **Properties**.
7. Scroll the window all the way to the bottom.
8. The **IPv4 address** is listed under **Properties**.
   Write it down.
9. Tap the **X** at the top right of the window to close **Windows Settings**.
10. Tap at the bottom center of the screen to display the taskbar.
11. Tap the **Windows** icon, then tap the **Power** icon and choose **Restart** to restart the device and launch the Aura application.

The first time that you connect to the KL1Plus from a browser, you may see a warning related to connection privacy. The browser raises this because the hosted application does not include a security certificate. This is not an issue since the device is on your own network, not the Internet. Click **Advanced**, then click **Continue to this website**. (You browser may display slightly different options.)

At the login prompt, enter your KL1Plus Username and Password, then click **Log in**.

NOTE: Any KL1Plus user account can log in to the dashboard.

The available reports are listed across the top of the browser window. Click a report type, or click **Logout username** to exit the dashboard.

Report options

All the reports have some options in common:

- At the top of the page, above the body of the report, are options to determine what subset of data to include in the report.
- Some reports allow you to set a date range; click the calendar icon to select the start or end date of the range.
- The report is displayed in columns. Each column heading has a filter icon, that you can use to further restrict the information shown in the report.
  - To use a filter, click the icon, then check the box next to one or more data points to retain in your report, then click **Filter**. Use the **Search** field to locate specific data in a long list, click **Clear** to deselect all items in the filter list, or check **Select All** to select all filter items.
  - Clearing a selection causes all data items in that column to be displayed.
  - A common use of **Select All** is to remove just a few items from consideration on the list; it is simpler to **Select All** then deselect a few, than it is to go through the entire list and select most entries.
  - You can use filters on multiple columns in a report to narrow down even further.
  - The filter icon is highlighted in columns where the filter has been applied.
- Sort data in a report by clicking in the column head that you want to sort. Click again to sort in the opposite direction. An arrow is shown in the column head to indicate which column is the sort criterion, and whether the sort is ascending ↑ or descending ↓.
- Below and at the left of each page is the page navigator, showing which page you are viewing, how many pages there are, and allowing you to open the ◀ previous, ▶ next, ⏮ first, or ⏭ last page. Click a page number to got directly to that page, or click **...** to see the previous or next 10 pages.

  Below and at the right of each page is an indicator of which items you are currently viewing.
- You can export the report data to a file. Click to export to an Excel file, or click to export to a PDF.

Monthly Audit Reports

The Monthly Audit Reports are generated on the 1st of every month. A report is active until the next report is generated.

This report allows you to review and make notes about every tracked medication in your inventory over the previous month.

There are three categories of Monthly Audit Reports: Pending, Complete, and Archived without Audit.

- Pending is the current report.
- Complete shows reports that have been audited.
- Archived without Audit shows reports that were not audited before the next monthly report was generated.

Choose the type of report from the pop-up list at the top of the report display.

For Complete and Archived reports, you can filter, sort, and export the data.

The Pending report allows you to inspect individual records, add notes, and mark each as audited.

To audit an individual medication:

- Click in the **Notes** column for the medication and enter details about the medication, then press **Enter**.
  The **Audited** column will be selected automatically.

—OR—

- Select the **Audited** column if you don't have any notes to add.

Changed data is shown with a red triangle in the upper left corner of the cell. After you have audited one or more medications, be sure to click ✔ **Save changes**.

When you save an audited medication, it is removed from the Pending report and added to the Complete report.

Transaction Audit Reports

A Transaction Audit Report gets generated for a medication whenever there have been a specific number of transactions for that medication. (The number of transactions is the same for all tracked medications; the default is 30. To change this value, please contact Capsa Healthcare Support.)

Transaction Reports never expire. There are two categories of report:

- Pending are those transactions that have not been reviewed.
- Complete are those reports that have been audited.

For either report, you can sort and filter the grouped transactions. Click the triangle at the left end of a medication's entry to see the details for the individual transactions in the group. You can export the detailed records for any group of transactions.

The Pending report allows you to add notes and mark each group of transactions as audited.

To audit a group of transactions:

- Click in the **Notes** column for a group of transactions and enter details about the group, then press **Enter**.
  The **Audited** column will be selected automatically.

—OR—

- Select the **Audited** column if you don't have any notes to add.

Changed data is shown with a red triangle in the upper left corner of the cell. After you have audited one or more transaction groups, be sure to click ✔ **Save changes**.

When you save an audited transaction group, it is removed from the Pending report and added to the Complete report.

> **NOTE:** Transaction Reports never expire. Pending transaction groups will remain in the list until they have been audited.

Summary Reports

The Summary Report shows the current Quantity on Hand for all tracked medications that have had a transaction in the specified date range.

Select a Start Date and End Date for the report, then click Generate Report.

Detailed Inventory Reports

This report lists all transactions for a single tracked medication within a date range, and the Quantity on Hand at the end date.

Select the medication from the drop-down list at the top of the report, then set the Start Date and End Date and click Generate Report.

Exception Reports

The Exception Reports show inventory details for non-transaction events for a single tracked medication over a selected date range.

- The Audit Adjustment report shows all adjustments made during on-device audits. See ***Adjusting a medication stock count*** on page 35.
- The Audit Match report shows all on-device audits where Open Quantity and Quantity on Hand match. See ***Confirming stock count*** on page 35.
- The Inventory Additions report shows all additions to inventory over the selected date range. See ***Adding a medication to stock*** on page 34.

By default, the report includes all users; you can select one or more users from the NUID list to limit the report to just specific users. Click in the field and select a user; selected users are highlighted. To clear the list (and report on all users), click the **X** at the right end of the field.

Select the type of report, select the medication, set the Start Date and End Date, select users if you want to limit the report to specific users, then click Generate Report.

KL1 Mode

KL1 Mode allows you to count medications without verification.

To enter KL1 Mode, tap ← **Back** until you reach the **Logout** screen, then tap **KL1 Mode**.

> **NOTE:** An administrator can determine whether KL1 Mode is available. See ***Start Mode Configuration*** on page 44.

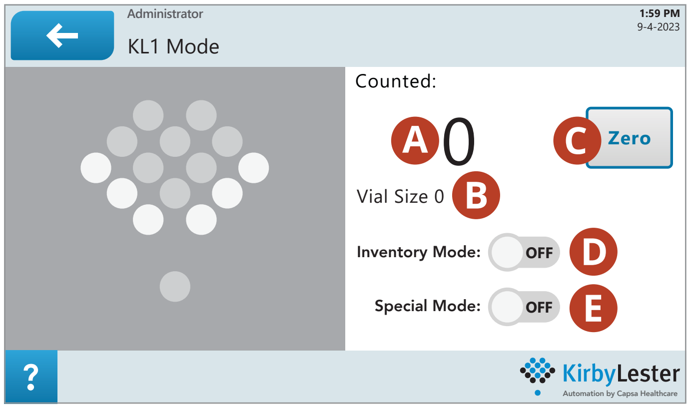


Figure 29: The KL1 Mode Screen

The KL1 Mode screen shows:

- **A. Counted:** This is how many pills have been counted.
- **B. Vial Size:** This is an estimate of the vial size (in drams) needed to hold the number of pills counted.
- **C. Zero:** Reset the counter to zero. (Use this in Inventory Mode, when you have finished counting.)
- **D. Inventory Mode:** Turn this on to continue counting a medication after you remove and replace the counting tray. This will allow you to fill a large order, or to count all the pills in your inventory.
- **E. Special Mode:** Turn this on if you are counting irregularly-shaped pills or pills with holes.

> **TIPS**
> - If you are counting a large number of pills that may require multiple pourings, turn on **Inventory Mode** before you start.
> - If you are counting pills that have holes or that are irregularly shaped, turn on **Special Mode** before you start. You may need to pour just a little bit slower depending on the nature of the pill you are pouring.

To count medications in KL1 Mode:

1. Start pouring the medication into the funnel.
2. When you are finished pouring, remove the tray, pour the contents into a vial or other container, then return the tray.
   If you are using **Inventory Mode** and want to continue counting, return the tray and pour more.
   If you are in **Inventory Mode** and are done counting, return the tray and tap **Zero**.

Cleaning and Storage

IMPORTANT: To help ensure accurate pill counts and proper operation, you must keep your KL1Plus clean. Failure to clean the device (especially the optical sensor windows) may result in inaccurate pill counts or the inability to count pills.

We recommend that you clean your KL1Plus once a day. If you experience multiple counting errors, or if you dispense many dust-generating medications, then clean it more frequently.

If the KL1Plus prompts you to perform a cleaning, tap the **Clean Now** message, then follow the cleaning procedure.

Before you start cleaning, shut down the KL1Plus and unplug it.

Elements to clean

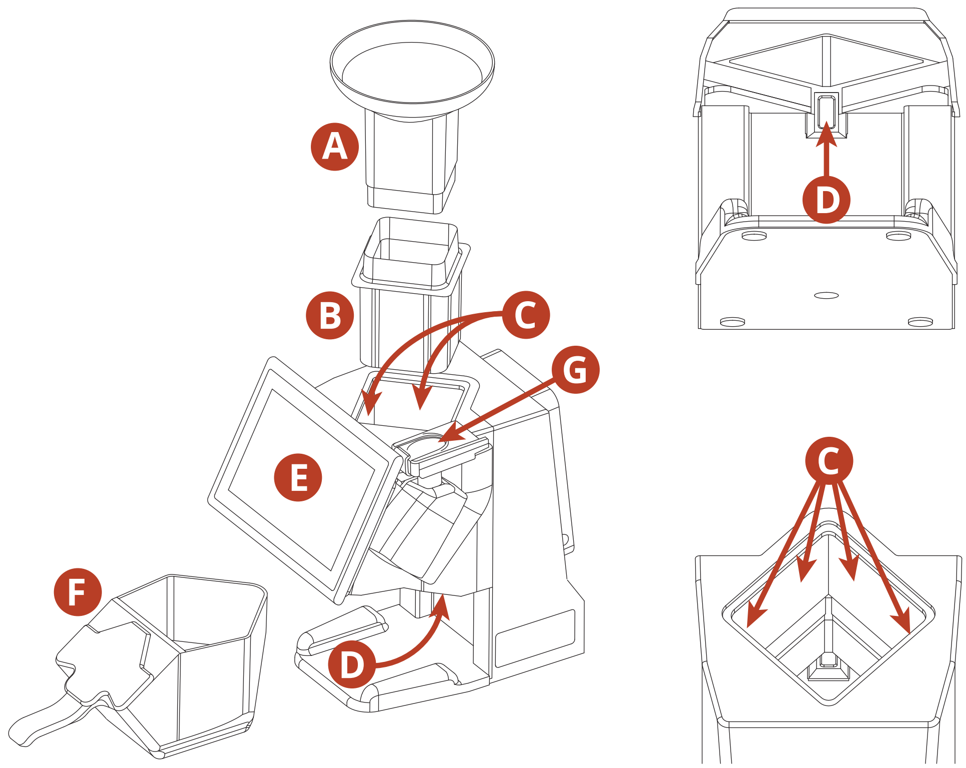


Figure 30: Elements to Clean

A. Pour funnel
B. Channel
C. Counting sensor windows
D. Tray sensor window
E. Touchscreen
F. Counting tray
G. Fingerprint scanner

Cleaning materials

To clean the KL1Plus thoroughly, you will need:

- Several soft, lint-free cloth or paper towels
- Mild, soapy water in a spray bottle (for cleaning the funnel, channel, and tray)
  The spray bottle offers more control than dipping your cloth in the cleaning solution.
- 70% isopropyl alcohol (for cleaning the counting and tray sensor windows)

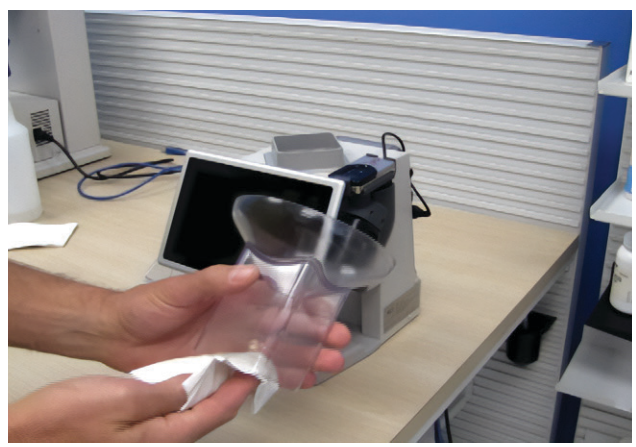
> **NOTE:** Using isopropyl alcohol to clean plastic parts may cause materials to yellow and become brittle over time, which may require earlier replacement.

- A flashlight to inspect the counting sensor windows for streaks
- Non-ammonia glass cleaner or computer screen cleaner (for cleaning the touchscreen)
  You can use a spray bottle or lint-free wipes
- Transparent tape (for cleaning the fingerprint scanner)

> **IMPORTANT:**
> - Don't use facial tissue, cotton balls or swabs, or alcohol wipes or swaps. These can leave fibers on the counting sensor windows which could affect accurate counting.
> - Don't use canned air, which can damage the KL1Plus.

Cleaning steps

1. Shut down and unplug the KL1Plus.
   Tap ← **Back** until you reach the Logout screen, then tap Shutdown.
2. Remove the counting tray and set it aside (**F** in Figure 30).
3. Remove and clean the pour funnel.

   a. Dampen a clean cloth with mild soapy water.
   b. Remove the funnel (**A** in Figure 30) and wipe it thoroughly inside and out.
   c. Dry the funnel with a lint-free cloth.
   d. Set the funnel aside.

4. Remove and clean the channel.

   a. Dampen a cloth with mild soapy water.
   b. Remove the channel from the KL1Plus body (**B** in Figure 30) and wipe it throughly inside and out.
   c. Dry the channel with a clean cloth.
   d. Set the channel aside.

5. Clean the counting sensor windows.

The counting sensors are located behind the four glass windows inside the body of the unit, under the funnel and channel (**C** in Figure 30). Most counting errors are caused by an accumulation of pill dust on the edges and corners of these windows.

> **CAUTION:** Don't press hard on the windows as this may break the glass. Your warranty doesn't cover damage due to misuse or abuse, including damage during cleaning.

   a. Wipe the windows with a dry, lint-free cloth to remove pill dust.
   b. Dampen a clean cloth with isopropyl alcohol and clean the windows thoroughly.
   Wipe side to side, not up and down.
   c. Wipe the windows dry with a clean cloth to remove streaks.
   You can use a flashlight to inspect the windows for streaks.

6. Clean the tray sensor window.
   The tray sensor tells the KL1Plus when the tray is properly seated. It is located behind the counting tray.
   a. Dampen a cloth with mild soapy water and clean the sensor window (**D** in Figure 30).
   b. Wipe the window dry to remove streaks.
7. Clean the touchscreen (as necessary).

   a. Dampen a clean cloth with non-ammonia glass cleaner or a computer screen cleaner. (You can also use prepackaged screen cleaning wipes).
      Don't spray liquid directly on the screen; spray it onto the cloth, then wipe the screen.
   b. Wipe the touchscreen (**E** in Figure 30) side to side or up and down. Don't use a circular motion.
8. Clean the counting tray.

   a. Dampen a cloth with mild soapy water.
   b. Wipe the tray (**F** in Figure 30) thoroughly inside and out.
   c. Dry the dray with a clean cloth.

9. Clean the fingerprint scanner (as necessary).

- Press a strip of transparent tape across the top of the fingerprint scanner (**G** in Figure 30) then peel it off.
  Don't clean the fingerprint scanner with liquid cleaner.

When you have finished cleaning, re-assemble the KL1Plus, plug it in, and turn it on.

Storing the KL1Plus

Store the KL1Plus unplugged, in a clean, dry, temperature- and humidity-controlled location out of direct sunlight. We recommend that you cover the KL1Plus with a soft cloth to prevent dust buildup during storage.

Group Permissions Defaults

Default settings are marked with a green check ✓.

Permission	Description	Admin	Pharm	Tech
Register Fingerprint	Users can add a fingerprint to log in. See page 49.	✓	✓	✓
Cleaning Reminder	Users can have the KL1Plus display a reminder to clean the device. See page 59.	✓		
Inventory Access	Users with this permission can determine who can access inventory functions. See page 57.	✓		
Manual Pick	Users can specify whether the KL1Plus or the pharmacy management system calculates the number of units to dispense. See page 61.	✓		
Register Scan Card	Users can add a scan card to log in. See page 51.	✓	✓	✓
Remove Rx	Users can remove a prescription from the active prescriptions list. See page 66.	✓	✓	
NDC Matching	Users can specify whether the KL1Plus considers or ignores the package size component of the NDC. See page 61.	✓		
Rx Expiration	Users can set a time for unfilled prescriptions to automatically expire. See page 66.	✓		
Audio Configuration	Users can set audio alarms for different events. See page 45.	✓		
Barcode Configuration	Users can set the numeric format for prescription barcodes. See page 45.	✓	✓	
Drugs	Users can add, remove, and modify drug information. See page 61.	✓	✓	
Group Permissions	Users can add, delete, and modify group permissions. See page 53.	✓		
Set System Time	Users can set the time and date used by the KL1Plus. See page 47.	✓		
Update	Users can update the KL1Plus software. See page 49.	✓		
Workflow Settings	Users can set requirements for members of each permission group to complete different operations. See page 40.	✓	✓	
Clear Inventory Counts	Users can erase physical inventory counts from the KL1Plus. See page 57.	✓		
Inventory Tracking Settings	Users can turn Inventory Tracking Mode On or Off. See page 57.	✓		
Data Removal	Specify how long data is retained in the archive. See page 44.	✓		
Reset Inventory	Users can reset inventory. See page 57.	✓		
Start Mode Configuration	Users can set the scan options available at startup. See page 44.	✓		

Permission	Description	Admin	Pharm	Tech
Rx Display	Users can specify the format and display of prescription and transaction numbers. See page 66.	✓		
User System Enablement	Users can turn on or off the system requiring user login. See page 52.	✓		
Auto Logout	Users can specify if the KL1Plus logs the user out if it is idle for a set time. See page 52.	✓		
Change Password	Users can change their login password. See page 51.	✓	✓	✓
Adjustment Reasons	Users can add or remove reasons that the inventory might be adjusted. See page 58.	✓	✓	
Exception Meds	Users can specify medications that require special handling. See page 65.	✓	✓	
Archiving	Users can specify when prescriptions are archived. See page 48.	✓		
Manage Users	Users can add and delete user accounts. See page 55.	✓		

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CAPSA HEALTHCARE

www.CapsaHealthcare.com | 800.437.6633

8170 Dove Parkway

Canal Winchester, OH 43110

Support: 800.243.2465 or TechSupport@CapsaHealthcare.com

Sales: 800.437.6633 or Info@CapsaHealthcare.com

Parts: 855.734.4399 or parts.support@CapsaHealthcare.com

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