

## MedServe Administrator Portal

### Medication Formulary Setup

1. Under the 'Administration' tab, select 'Formulary'
2. Select the  button to create a new formulary or select a pre-existing formulary
  - If creating a new formulary, enter in the name
3. Select the  button in the 'Drugs' field to begin entering in medications
4. If available, type in the NDC # to search for the desired medication
  - IMPORTANT: dashes are required for lookup
    - i. Ex: 0409-9093-31
  - TIP: enter in "custom" to add in any medication or supply name if not found in the search function with the NDC
5. Select 'Save' and enter in the formulary information
  - The 'Nickname' is the name that will appear on the MedServe cabinet.
  - Base unit of measurement (Base UOM) should match the medication type (each, mcg, mL, mg, etc).
  - Access policy can be customized based on site's policy
6. Select 'Save' when complete
7. Continue to add medications by repeating steps 3-5
8. To delete a medication from the formulary, select the  on the desired medication
  - The medication will have a strikethrough but will not permanently delete from list
  - The medication will no longer be available to add to the MedServe cabinet
9. Select the  button in the upper right side when finished adding or deleting medications
  - Note: medications can continued to be added or deleted at a later time

### Cabinet Bin Setup

1. Under the 'Administration' tab, select 'Cabinets'
2. Enter in the name of the bin in the 'Bin Name' field
  - TIP: name should be reflective of what is stored in the bin
3. Access policy and user lists can be customizable. Access policy will default to the medication that is assigned to the bin access policy. Users will default to all users within cloud account that have appropriate level access
4. Assign medication(s) to each bin by selecting 
5. Select medication from the dropdown menu. This menu contains only medications that are listed in the one formulary that is assigned to the specific cabinet. If a medication is missing, it must be added to the formulary.
6. Select  to add the medication. Add additional medication(s) as needed, being sure to select  after entering each medication.

7. Select  when done
8. Complete steps 2-7 for each cabinet bin
9. When done setting up the cabinet bin information, Select the  button in the upper right side