

# CAPSLink® User Manual

VERSION 1.08.1



**C A P S®**

*delivering solutions*™

A B. Braun Company

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# 1. Before You Begin

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Welcome to CAPSLink. CAPSLink is a web based system for ordering TPN and other IV solutions from your CAPS pharmacy.

## Module Function Overview

- ◆ System Requirements
- ◆ Accessing CAPSLink and Adding CAPSLink to your Browser's Favorites.
- ◆ Logging into CAPSLink
- ◆ Creating/Editing CAPS Link User Profiles
- ◆ Inactivating User Profiles
- ◆ Changing a Password

## 1.1 System Requirements

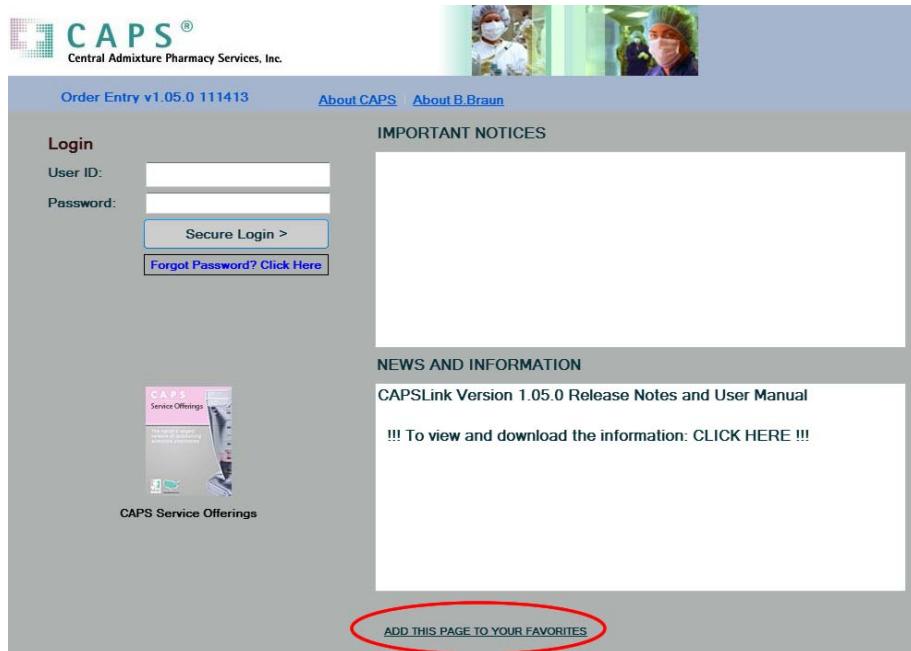
- Internet Explorer 7.0 or greater
- Adobe Acrobat Reader 9.0 or greater
- Windows 2000, XP, Vista, Window 7
- Adobe Flash plug-in version 10 or greater
- 100MB free memory
- Dual core 2GHz recommended
- Citrix or VMware View virtual environment supported

## 1.2 Accessing CAPSLink and Adding CAPSLink to your browser's Favorites

To connect to CAPSLink open your Internet browser and enter the following link in the address field:

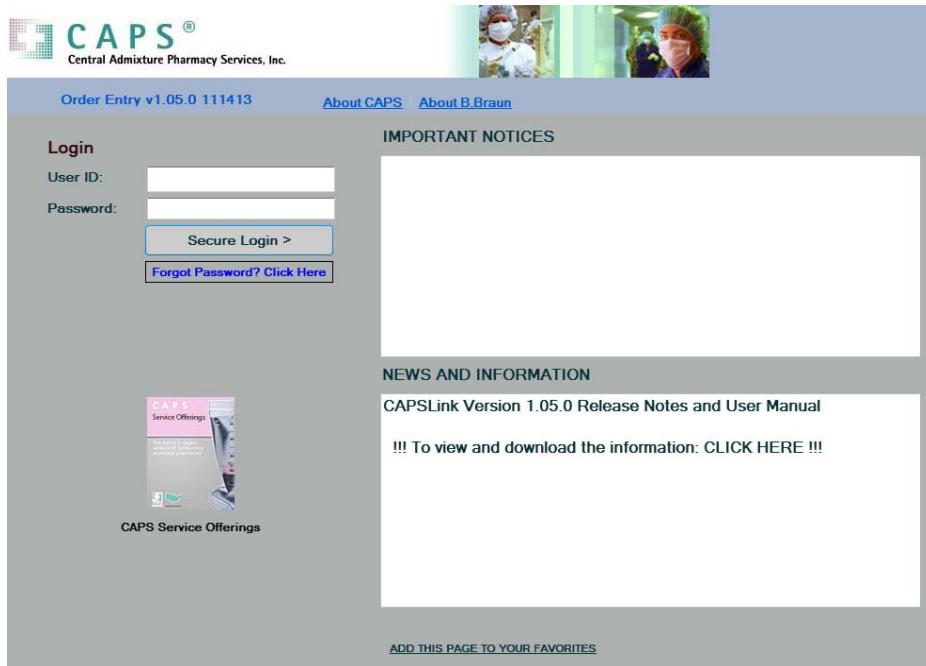
<http://www.capsorders.com/capslink>

At the login screen you can add CAPSLink to your Favorites by clicking on the link located below the CAPS Icon. See Fig 1-1 below.



**Figure 1-1.** Login window and Add to Favorites Link

### 1.3 Logging in to the Application



**Figure 1-2.** Logon Window Example

At the login screen you will see two large text fields on the right entitled Important Notices and News & Information. These contain important tips and announcements regarding the CAPSLink system (see Fig 1-2).

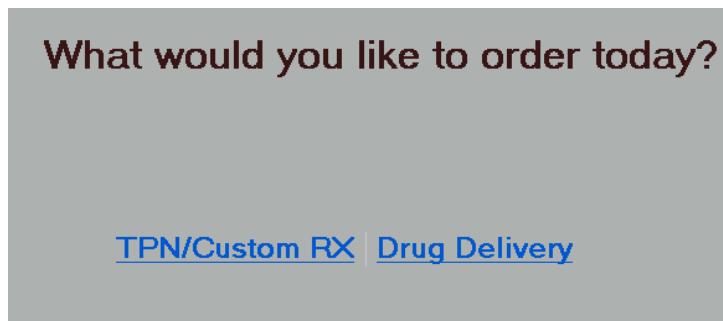
In the upper left hand corner of the login screen enter your CAPSLink User ID and Password. Your Password is masked by asterisks (\*) as you type to prevent others from viewing. To complete the logon process press Enter on your keyboard or left mouse click the Secure Login button. If this is the first time logging into CAPSLink you must use the password that was assigned to you when your user profile was created. The creator of your user profile will supply you with this password. When you login you will be prompted to answer 2 security questions. This information will be stored with your profile incase you forget your password and need to retrieve it (see section below on retrieving forgotten passwords). You will also be prompted to change your password after your first login.

Passwords must:

- Be between 6 and 10 characters in length
- Contain at least one upper and lower case alpha character
- Contain one numeric character.

*NOTE: If you do not know your User ID and Password, see your Pharmacy Director.*

When you log into the CAPSLink program you may have the option to enter the TPN/Custom Rx or Drug Delivery modules (Figure 1-3). Select the 'TPN' option for processing TPN orders and other patient specific orders or 'Drug Delivery' to order other sterile compounded products.



**Figure 1-3. TPN/Custom Rx or Drug Delivery Options**

## **1.4 Creating/Editing CAPSLink User Profiles.**

If you are a user with Administrative access you can create user profiles for your staff. After logging into CAPSLink, select the 'User Management' link under Administrative Options in the left hand navigation pane. You will be presented with a list of user profiles that are currently in the system (fig 1-4). You can filter this list for active/inactive profiles by using the radio buttons at the top left of the window:

User Profile List						
Name	User Code	Role	Active	Patient	TPN Order	System
Clinical , User 2	CLINICAL2	Clinician - Web	<input checked="" type="checkbox"/>	Read: <input checked="" type="checkbox"/> Write: <input checked="" type="checkbox"/>	Read: <input checked="" type="checkbox"/> Write: <input checked="" type="checkbox"/> Appr Warnings: <input type="checkbox"/> Appr Criticals: <input type="checkbox"/>	Reports: <input checked="" type="checkbox"/> Admin: <input type="checkbox"/> Drug Delivery: <input type="checkbox"/>
Jones , Todd	TJONES	DOP - Web	<input type="checkbox"/>	Read: <input checked="" type="checkbox"/> Write: <input checked="" type="checkbox"/>	Read: <input checked="" type="checkbox"/> Write: <input checked="" type="checkbox"/> Appr Warnings: <input checked="" type="checkbox"/> Appr Criticals: <input checked="" type="checkbox"/>	Reports: <input checked="" type="checkbox"/> Admin: <input checked="" type="checkbox"/> Drug Delivery: <input checked="" type="checkbox"/>

**Figure 1-4. User Profile List**

#### 1.4.1 Adding a New User

Click on the ‘Add New User’ button at the top of the page. The User Maintenance window will display (fig 1-5). Enter the user’s last and first names and enter a unique User ID between 6 and 10 characters in length. Select a user title using the drop-down (see section 1.3.3 for more information on user titles). After a title is selected the software automatically selects the recommended user privileges for the selected user title. You may also select the user privileges manually by clicking or ‘unclicking’ the checkbox next to each privilege (see section 1.3.2 for more information on User Privileges). The system will also assign a random password that conforms to the system password requirements. Enter an expiration date if you want this user account to expire automatically (see section 1.3.5 below). Write down the user ID and new password for the user, as you will not be able to retrieve the same password later. Click ‘Save’ after you have completed the user profile. The user can log into the system with their User ID and randomly generated password. After they have logged in, the application will prompt them to change their password.

User Privileges:

##### Patient

Read – patient profile data viewable but not editable

Write – patient profile data viewable and editable

##### TPN Order Entry

Read – Order data viewable but not editable

Write – Order data viewable and editable. Can create/edit/save/approve an order.

Approve Warning – allows user to override a Warning level message on validation.

Critical – allows a user to override a Critical level message on validation.

##### System

Reports – Reports are viewable

Admin – Ability to create/edit user profiles, read/write access to Prescriber and Area Maintenance.

Drug Delivery – Access to the Drug Delivery (Anticipatory Compounded Products) module.

The screenshot shows the 'User Maintenance' dialog box. At the top, there are fields for Last Name (TEST), First Name (USER), MI (left empty), Active (checked), and a date picker for Expires After. Below these are fields for User ID (TESTUSER) and a password field containing '\*\*\*\*\*'. A 'Reset PW' button is next to the password field. The 'Title' dropdown is set to 'Pharmacist - Web'. The main area is divided into sections: 'Patient' (Read checked, Write checked), 'TPN Order Entry' (Read checked, Write checked, Appr Warnings checked, Appr Criticals checked), 'Reports' (Read checked), 'System' (Admin unchecked, Drug Delivery checked), and 'Drug Delivery' (checked). At the bottom are 'Save' and 'Cancel' buttons.

**Figure 1-5. User Maintenance Window**

#### **1.4.2 User Titles**

##### **1.4.2.1 Technician**

By default a Technician user can create patient profiles and TPN orders but cannot validate (approve) an order.

##### **1.4.2.2 Pharmacist**

By default a Pharmacist user can create patient profiles and TPN orders and can validate (approve) TPN orders.

##### **1.4.2.3 DOP**

This user has the same user privileges as a Pharmacist but can also create/edit user profiles.

#### 1.4.2.4 Clinician

The Clinician user is able to enter and save orders. Clinician users can also open other Clinician generated orders and make changes. The status of an order initiated by a Clinician user is 'With Clinician'. The clinician can run validation against the order to view the validation warnings, but they cannot validate the order. When the Clinician user is ready to make the order available to a Pharmacist for review and validation they must click the 'Send to Pharmacy' button in the Order Maintenance screen (see Fig 1-6). Once this is done the order status changes to 'Needs Validation' and can only be accessed and validated by a Pharmacist or DOP user. Clinician users can edit orders that were previously created by another Clinician user. If a Clinician user enters and order their name will automatically appear in the 'Prescribed By' field in the order. The prescriber is also visible from the main patient list screen.

The screenshot shows the Order Entry screen for a Clinician. At the top, there is a 'Patient Info' section with fields for Patient Name (Doe, John), Category (Adult (15-65)), Area (ICU NORTH), Room, Bed, Sex (M), Age (21), DOB (08/18/1990), Weight (70 Kg), Height (0 cm), MRN, and Acct#. Below this is a 'Template' section showing 'ADULT TPN - BY SALT'. To the right of the patient info are buttons for 'Validate', 'Send to Pharmacy' (circled in red), 'Save', 'Edit', 'Discontinue', 'Close', 'Unlock', 'Refill...', 'Num Units' (set to 1), 'Entered By' (Clinical User), and 'Validated By'. A status message 'Order 1005-355 Status' is shown above the 'With Clinician' status indicator. In the center, there is an 'Order Info' section with fields for Order Volume (2000 mL), Order Overfill (50 mL), Order Duration (24 Hours), Flow Rate (83.33 mL/hr), Rx Number (200-1), and Route of Administration (Central, Peripheral, Not Specified). At the bottom left is an 'Ingredients' section with a table for selecting items. The table has columns for Select, Item (AMINO ACID), Quantity (1000), UOM (ml), Per, and Order. There is a 'Delete' button at the bottom right of the table. The bottom right corner of the screen features a printer icon.

Fig 1-6 Order Entry Screen – Clinician User

#### 1.4.3 Security Questions and Password Recovery

On first login users will be asked to answer 2 security questions that will be stored with their user profile (see figure 1-7). If a user forgets their password, they can reset it by clicking a 'Forgot Password' link at the login screen (see figure 1-8). When the link is clicked the user is prompted for their username and CAPTCHA entry. Then they are prompted to answer one of their security questions. If they are unsuccessful after 5 tries they are prompted to answer the second security question. If the user answers one of the security questions correctly a new randomly generated password will be displayed. The user can then log into the system with this new and then reset it to a password of their choice.



**Fig 1-7** Password Security Questions



**Figure 1-8 – Password Recovery link**

#### 1.4.4 Editing an Existing User Profile and Resetting Passwords

Click on the User Management link to display the list of users. To edit an existing profile, double click on the user's name. After the User Maintenance window opens, make your changes and click the Save button when finished.

You can reset a password by clicking on the Reset PW button. This will reset the password which will be displayed in the password field. The user can then login using this newly generated password. After the user logs in, the application will prompt them to change their password. Passwords must be between 6 and 10 characters in length, must contain at least one upper and lower case alpha character, and one numeric character.

#### **1.4.5 Inactivating/Reactivating a User Profile and setting an Expiration Date**

It is important to inactivate any users that no longer need access to the CAPSLink system.

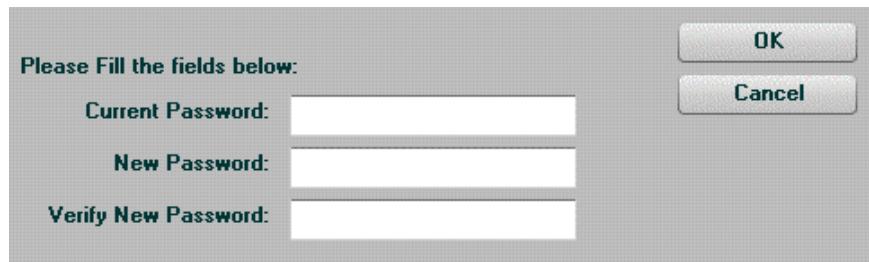
To inactivate a user double click on the user's name. After the User Maintenance window opens, uncheck the box next to "Active", then click on the Save button.

To reactivate a user account, you will first need to search for inactive accounts by clicking on the 'Inactive' radio button at the top of the User Profile list. Click Search. Double click the user's name and after the User Maintenance window opens, check the box next to "Active", then click on the Save button.

An optional expiration date can be set for a user profile by entering a date in the expiration date field. The user profile will be automatically inactivated after this date. You can also re-activate this user at a later time and set a new expiration date.

#### **1.4.6 Changing a Password**

A user can change his/her password by clicking on the 'Change Password' link in the Administrative Options section of the navigation bar on the left hand side of the main screen. The user will be prompted to enter their current password and their new password (Figure 1-9). Passwords must be between 6 and 10 characters in length, must contain at least one upper and lower case alpha character, and one numeric character.



**Figure 1-9. Change Password Dialog**

#### **1.4.7 Password Expiration**

User passwords will expire after a 90 day period. When a user's password is within 14 days of expiring, CAPLink will warn the user at login and give them the opportunity to change their password. If the user decides not to change their password the login prompt will count down the days until the password expires. If a user attempts to login after the password has expired the user will be required to change their password to gain access to the system.

## 2. Navigation

### Module Function Overview

- ♦ Navigating the Main screen of CAPSLink
- ♦ Filtering the Order List

### 2.1 Navigating the Main Screen

When you first log into CAPSLink, the main screen of the application is displayed (Figure 2-1). By default, the main screen will display a list of patients with current orders. This list can be filtered based on order status by clicking the Order Filters at the top of the screen. For example, to filter the list for orders with a status of 'Ready to Send', click the Ready to Send link. You can also retrieve a list of all active or inactive patient profiles by clicking on the appropriate filter link at the top of the screen and you can filter the order list by age category by clicking the appropriate checkbox (ie. Adult, Pediatric, or Neonate).

The Main Navigation Bar contains links for managing Patients, Prescriptions, Reports, and Administrative options. When these links are clicked, the corresponding window will open. To return to the main screen, click the window's close button, or click the 'Patient List' link at the top of the Navigation Bar.



Figure 2-1. CAPSLink Main Screen

### 3. Patient Management

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#### Module Function Overview

- ◆ Creating a New Patient Profile
- ◆ View/Edit an Existing Patient Profile
- ◆ Inactivating a Patient Profile
- ◆ Retrieving an Inactive Patient

#### 3.1 Creating a New Patient Profile

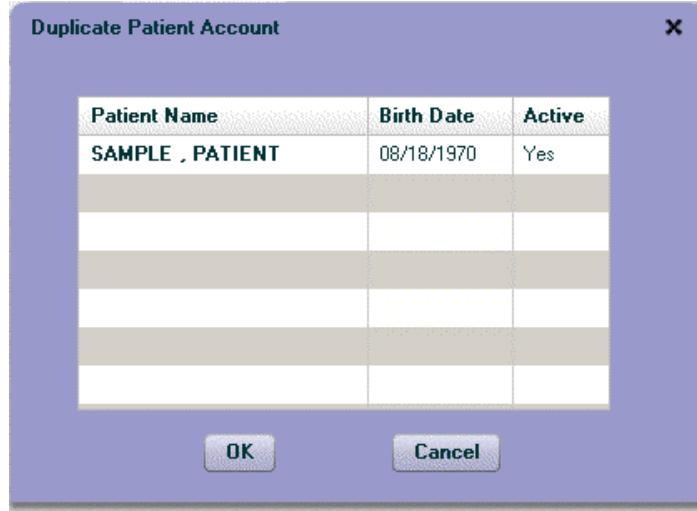
##### 3.1.1 Entering Patient Data

In the Navigation sidebar on the left of the main screen click on the ‘New Patient’ link to open a new patient profile window (figure 3-1).

The screenshot shows a software application window titled 'Patient Profile'. The window contains several input fields and buttons. At the top right are three buttons: 'Save + New Order', 'Save Changes', and 'Cancel'. Below these are sections for 'Patient Name' (Last Name: SAMPLE, First Name: PATIENT, M.I.: blank), 'Date of Birth' (08/18/1970), 'Age Category' (Adult (15-65)), and 'Active' (checkbox checked). There are dropdown menus for 'Sex' (Male) and 'Area' (ICU). Weight is listed as 70.00 Kg and 154.32 Lb. Height is listed as 180 cm, 5 ft, and 10.87 in. A 'Diagnosis' field contains COPD. An 'Allergies' section lists Penicillins with a plus sign icon. A 'Physician' dropdown shows AMES with a plus sign icon. At the bottom is a table with columns for Rx Number, Bag #, Status, Start Date, and Prescribed By.

Figure 3-1. Patient Profile Window

Enter the appropriate information into each field. The required fields are marked with an asterisk (\*). If a duplicate Patient Account number is found, the Duplicate Patient Account number window will display (see figure 3-2). To select the duplicate account, click on the patient listed in the Duplicate Patient Account window and click ‘Open’. To close the window and continue entering a new patient profile, click ‘Cancel’.



**Figure 3-2 Duplicate Patient Acct. Number**

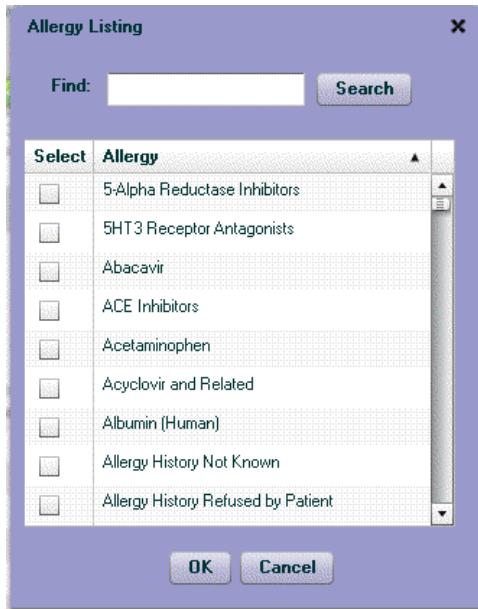
If a date of birth is entered in the DOB field, CAPSLink will automatically assign the appropriate age category. If the format of the DOB is incorrect, CAPSLink will prompt you to enter the appropriate format.

**Figure 3-3 Invalid DOB format**

You can build custom lists for the Area and Physician fields by clicking on the icon next to the field. If a weight is entered in either the 'kg' or 'lb' field the 'kg' or 'lb' equivalent will be calculated and entered into the corresponding field. Similarly if a height is entered in the cm or ft/in fields the equivalent height (in cm or ft/in) will be calculated and entered into the corresponding field.

### 3.1.2 Assigning Allergies

To enter an allergy click on the icon next to the allergy field and select from the predefined list of allergies (figure 3-4). Click the 'OK' button and the selected drug or drug categories will be assigned to the allergy field. To remove an allergy click on the icon to the left of the drug or drug category in the allergy field.



**Figure 3-4 Allergy List**

If a patient has a history of latex sensitivity, place a check in the 'Latex Sensitive?' checkbox. On validation a critical warning will appear, reminding the user that the patient is latex sensitive.

### 3.1.3 Saving Changes

After you have completed your entries click the 'Save Changes' button. If you plan to create an order for this patient immediately after saving your changes, click the 'Save + New Order' button.

### 3.1.4 Setting Required Fields and Disabling Fields

The Last Name, First Name, and Age Category are hard coded as required fields. However, a Administrative (DOP) user can toggle the following fields to be either required or optional:

- Patient Account Number, Medical Record Number, DOB, and Patient Weight (Patient Profile)

Selected fields can also be enabled or disabled per customer preference:

- Height, Weight (kg), Weight (lb), Patient ID, Medical Record Number (MRN).

These settings can be changed by clicking on the '**Fields Maintenance**' link in the navigation pane. For more details on the Fields Maintenance settings see section 9 (Maintenance/Help).

### 3.2 View/Edit an Existing Patient Profile

If the patient is not currently displayed in the TPN management window, click on the 'All Active Patients' link in the upper portion of the screen (see figure 3-5). You can also search for a patient by Medical Record Number by clicking the 'Patients by MRN' link.

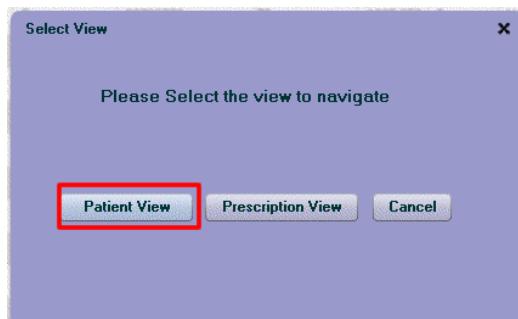


The screenshot shows a software interface for managing TPN orders. At the top, there are several status indicators: 'All Orders' (4), 'Yesterday's Orders' (0), 'Ready To Send' (0), 'All Active Patients' (highlighted with a red box), 'With Clinician' (0), 'Today's Orders' (4), 'Released To Caps' (4), 'All Inactive Patients' (highlighted with a red box), 'Needs Validation' (0), 'Received By Caps' (0), 'Patients by MRN' (highlighted with a red box), and 'Orders Completed'. Below these are buttons for 'Refresh', 'Send To Caps', and 'Orders Completed'. The main area is a grid table with columns: Patient Name, Area, Room, Patient ID, MRN, Wt KG, Cust Rx#, Bag #, Product Grp, Prescribed By, and Order Status. Three rows of data are shown, each with a small icon and the text 'ADULT, TEST' followed by 'ICU', '2134456', '4456879', '2918-25', '2918-30', 'T', 'MD', and a green button labeled 'Released to CAPS'.

All Orders	Yesterday's Orders	Ready To Send	All Active Patients	With Clinician	Today's Orders	Released To Caps	All Inactive Patients	Needs Validation	Received By Caps	Patients by MRN	Orders Completed
4	0	0		0	4	4		0	0		

Figure 3-5. All Active Patients Link

When the Patient List displays, double click anywhere on the corresponding line. When the Select View dialog opens, click 'Patient View'.



After making changes to the profile click the 'Save Changes' button or click the 'Save + New Order' button if you want to save the changes and create a new order for the patient.

At the bottom of the Patient Profile window is a list of the patient's orders (Figure 3-6). You may click on the Rx number to open the Order window. Once the order is open you can click the Edit button to create a copy of the order and make any necessary changes needed for the current day's order.

The screenshot shows a patient profile window with the following fields:

- Pat Acct #:** [ ]
- \*MRN:** [ ]
- \*Last Name:** DOE
- \*First Name:** JOHN
- M.I.**: [ ]
- Patient Name:** DOE
- Date of Birth:** 08/18/1990
- \*Age Category:** Adult (15-65)
- Active:**
- Sex:** Male
- Area:** ICU NORTH
- Room:** [ ]
- Bed:** [ ]
- Weight:** 70 Kg 154.322 Lb
- Height:** [ ] cm [ ] ft [ ] in
- Diagnosis:** [ ]
- Allergies:** Cimetidine
- Physician:** Stein

Below the profile information is a section titled "Order List" with a red arrow pointing to it. It contains the following information:

- Cimetidine**
- Latex:**  Latex
- Sensitive?**  Sensitive?

Rx Number	Bag #	Status	Start Date	Prescribed By
1005-275	1005-275	Needs Validation	08/03/2011 20:00:00	CAPS
1005-294	1005-294	Discontinued	08/11/2011 20:00:00	CAPS
1005-294	1005-295	Yesterdays Order	08/11/2011 20:00:00	CAPS

Figure 3-6. Patient Order list

### 3.3 Inactivating a Patient Profile

After a patient is discharged or no longer receiving TPN you may want to deactivate their profile so that they no longer come up on the Active Patient List. To deactivate a patient open the patient profile window and uncheck the 'Active' checkbox (Figure 3-7).

The screenshot shows a patient profile window with the following fields:

- Pat Acct #:** [ ]
- \*MRN:** [ ]
- \*Last Name:** DOE
- \*First Name:** JOHN
- M.I.**: [ ]
- Patient Name:** DOE
- Date of Birth:** 08/18/1990
- \*Age Category:** Adult (15-65)
- Active:**
- Sex:** Male

Figure 3-7. Active Patient Setting.

### 3.4 Retrieving an Inactive Patient

You can retrieve an inactive patient account by clicking on the “All Inactive Patients” link at the top of the patient list (see figure 3-8). Once you have retrieved the list of inactive patients you can open the patient profile by double clicking anywhere on the patient record. Once opened, you can reactivate the account by clicking the ‘Active’ checkbox and saving your changes.



4 All Orders		0 Yesterday's Orders		0 Ready To Send		All Active Patients		Adults		Refresh	
0 With Clinician		4 Today's Orders		4 Released To Caps		All Inactive Patients		Neonates		Send To Caps	
0 Needs Validation		Double Click		0 Received By Caps		Patients by MRN		Pediatrics		Orders Completed	
	Patient Name	Area	Room	Patient ID	MRN	Wt KG	Cust Rx#	Bag #	Product Grp	Prescribed By	Order Status
<input type="checkbox"/>	ADULT, TEST	ICU		2134456	4456879		2918-25	2918-30	T	MD	Released to CAPS
<input type="checkbox"/>	ADULT, TEST	ICU		2134456	4456879		2918-21	2918-29	T	MD	Released to CAPS
<input type="checkbox"/>	ADULT, TEST	ICU		2134456	4456879		2918-22	2918-22	T	CPOE, TEST	Released to CAPS

Figure 3-8. Inactive Patient Link

## 4. New Orders

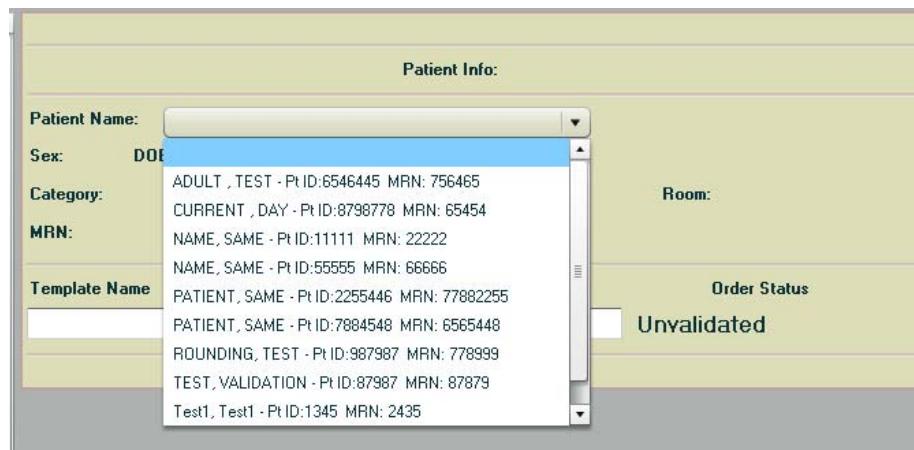
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### Module Function Overview

- ◆ Creating a New Order
- ◆ Printing a Sample Label
- ◆ Processing a New Order
- ◆ Canceling and Discontinuing an Order

### 4.1 Creating a New Order

In the Navigation sidebar on the left side of the main screen click on the 'New Prescription' link. Select a patient name using the patient name dropdown (see figure 4-1). The patients are listed by name, Patient ID, and MRN. This allows you to find patients with duplicate names. Select a template from the Template Name dropdown (figure 4-1). If the patient name is not found, cancel this window, click on the New Patient link on the left side of the main window, enter a new patient, and then create the order. Note: New templates can only be added by contacting your local CAPS Pharmacy.



**Figure 4-1. Patient Lookup Dropdown**

Patient Info:

Patient Name:	DOE, JOHN	Sex:	M	Age:	0	DOB:
Category:	Adult (15-65)	Area:	ICU NORTH	Room:		Bed:
Weight:	70	Kg	Height:	0	cm	MRN:
			Acct#:			

Template Name

Order Status

Unvalidated

ADULT TPN - BY ION  
ADULT TPN - BY SALT

**Figure 4-2. Starting a New Prescription**

Patient Info:

Patient Name:	DOE, JOHN	Sex:	M	Age:	21	DOB:	08/18/1990
Category:	Adult (15-65)	Area:	ICU NORTH	Room:		Bed:	
Weight:	70	Kg	Height:	0	cm	MRN:	
Template:				ADULT TPN - BY SALT			

Order Info:

Validate

Send To Caps

Save

Edit

Discontinue

Close

Unlock

Refill

Num Units:

Entered By:

TEST.USER

09/01/2011 15:12

Validated By:

\*Prescribed By: SMITH

Ingredients:

Select	Item	Quantity	UOM	Per
<input type="checkbox"/>	AMINO ACID	1000	ml	Order
<input type="checkbox"/>	DEXTROSE	800	ml	Order
<input type="checkbox"/>	LIPIDS	0	ml	Order
<input type="checkbox"/>	SODIUM CHLORIDE	30	mEq	Order

Administration Instructions:

Delete

New

Edit

**Figure 4-3. Order Entry Screen**

#### 4.1.1 Header Field

At the top of the main order window (below the template name) there is an editable 'Header' field. The text in this field will print at the top of the ingredient list on the product label (figure 4-3).

#### 4.1.2 Entering a Volume/Rate

If you enter values into any two of the order, duration, and flow rate fields, CAPSLink will automatically calculate the third parameter. Also, if you make a change to one of these fields, you will be prompted to have CAPSLink calculate one of the other two fields (figure 4-4). Click the

button corresponding to the field you want CAPSLink to recalculate. If you click the Cancel button, CAPSLink will not recalculate either field.

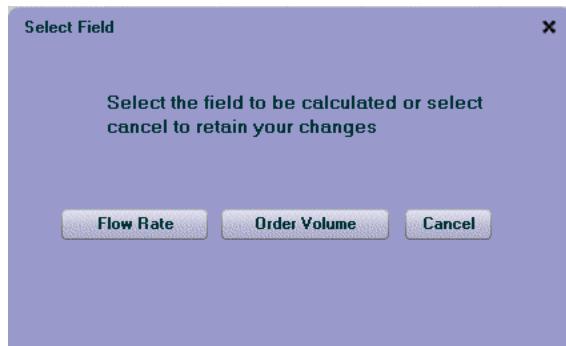


Figure 4-4. Select Field Dialog

#### 4.1.3 Volume Calculators

There are two volume calculators that you may use to calculate a TPN order volume.

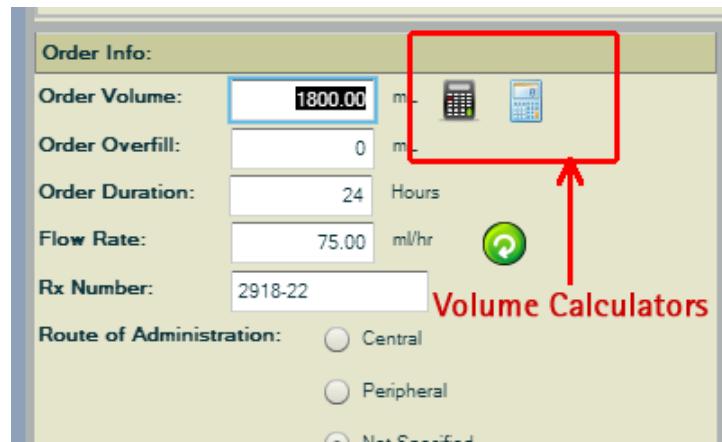
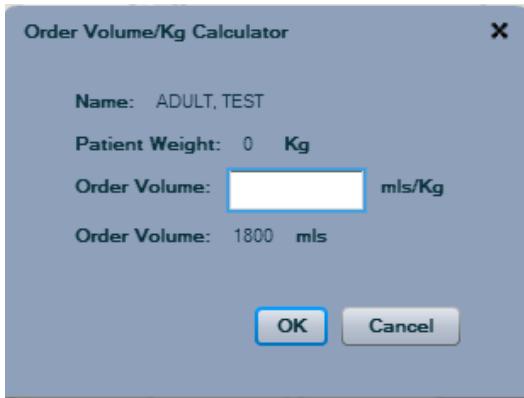


Figure 4-5 Order Volume Calculators

The **volume per kg calculator** can be accessed by clicking on the first calculator icon to the right of the Order Volume field . When the Order Volume per Kg Calculator pop-up appears (figure 4-6), enter the order volume in mls/kg and click on the 'OK' button. The Order Volume field will be populated with the calculated value.



**Figure 4-6 Order Volume/Kg Calculator**

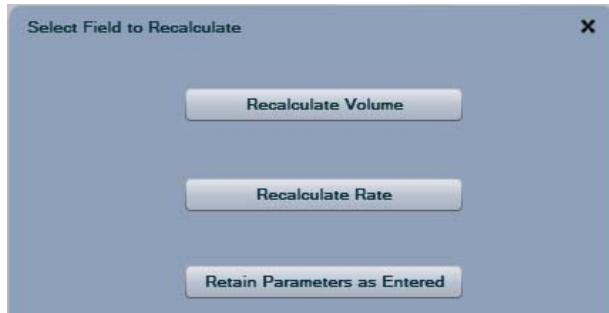
The 24 Hour Order Volume/Kg calculator allows you to calculate a TPN order volume by entering the patient's total daily fluid requirement and subtracting any other sources of fluid the patient is receiving. This calculator is accessed by clicking on the calculator icon to the right of the Order volume/kg calculator. Enter the appropriate volumes in each field of the 24 Hour Order Volume/Kg Calculator pop-up (fig 4-7) and click 'OK'. The Order Volume field will be populated with the calculated value.

A screenshot of a software application window titled "Advance 24 Hour Order Volume/Kg Calculator". The window has a light blue header bar with the title and a close button (X). Below the header, there are several input fields and calculations: "Name: DEMO, PATIENT Patient Weight: 68.04 Kg", "Total Daily Volume: 3000 ml = 44.09 ml/kg/day", "- Enteral Volume: 500 ml = 7.35 ml/kg/day", "- Lipid Volume: 200 ml = 2.94 ml/kg/day", "- Other IV's: 500 ml = 7.35 ml/kg/day", "= TPN TOTAL VOLUME: 1800.00 ml = 26.45 ml/kg/day", and "Flow Rate: 75.00 ml/hr". At the bottom of the window are two buttons: "OK" and "Cancel".

**Figure 4-8 24 Hour Order Volume/kg Calculator**

#### 4.1.4 Cyclic Orders

To enter a cyclic infusion rate, enter a volume and duration for your order then press the 'tab' key. If the duration field was pre-populated with a duration, when you change the duration you will get a prompt to recalculate the rate, volume, or retain parameters as entered (see below). Select 'Retain Parameters as Entered'.



In the flow rate field, change the rate to '0' ml/hr. Press the 'tab' key. You will once again be prompted to recalculate the volume, rate, or retain parameters as entered. Select 'Retain Parameters as Entered'. Your flow rate should be set at '0' ml/hr.

Click the cyclic rate icon next to the flow rate field. CAPS Link will calculate a cyclic infusion rate with a one hour taper up and down (at half the maintenance rate). See Figure 4-8.

Click 'OK'.



**Figure 4-8 Cyclic Flow Rate Dialog**

**Important Note:** The Cyclic Flow Rate window is not intended to calculate a rate schedule other than the default 1 hour taper up and down at half rate. If the numbers in the Cyclic Flow Rate window are changed, the software will not recalculate the infusion rates, resulting in an different order volume.

After the cyclic rate is saved, 'Cyclic' will appear in red text in the rate field (see Figure 4-9). This cyclic rate schedule will automatically print on the TPN label in the administration instructions field.

To clear a cyclic rate from the order you can click the 'Clear Cyclic' button.

Order Info:	
Order Volume:	2000 mL <input type="button" value="Calculator"/>
Order Overfill:	50 mL
Order Duration:	12 Hours
Flow Rate:	CYCLIC <input type="button" value="Cyclic"/>
Rx Number:	<input type="text"/>
<input type="button" value="Clear Cyclic"/>	

**Figure 4-9 Cyclic Rate Indicator**

To enter an infusion rate other than the default 1hr taper up and down you will have to manually calculate your infusion rates for your tapering schedule. Follow the instructions above for entering the volume, duration, and rate. Do not click the cyclic rate button. Enter your cyclic rate schedule in the 'Administration Instructions' field.

#### 4.1.5 Route of Administration

You can specify a peripheral or central route of administration by clicking on the appropriate radio button. If the Peripheral or Not Specified route is selected then CAPSLink will display a warning on validation if the osmolarity of the final solution is above the osmolarity threshold. Contact your CAPS pharmacy if you need to establish or change an osmolarity threshold setting.

#### 4.1.6 Select Physician

You can select a physician from the Prescribed By dropdown. If you need to add a physician to the list click the  button next to the Prescribed By dropdown.

#### 4.1.7 Entering Electrolytes by Ion

If your template is set up to order electrolytes by ion, the fields for entering the amount for each ion will appear on the screen in the 'Base Elements' section (Figure 4-10). Enter in the ordered amounts and specify the 'Per' option by using the dropdown on the right. Acetate and Chloride can be ordered by % or by milliequivalent amounts (if your template is set for ordering by salts, the 'Base Elements' section will not be visible).

Base Elements:		
	Amount	UOM
Sodium:	20	mEq
Potassium:	10	mEq
Phosphate:	0	mmole
Calcium:	0	mEq
Magnesium:	0	mEq
Acetate:	100	%
Chloride:	0	%
		Per
		Ord

**Figure 4-10. Base Elements section.**

#### 4.1.8 Entering/Editing/Deleting Ingredients

To enter a quantity for an ingredient, click in the quantity field and enter the appropriate number (figure 4-11). You can navigate down the list of ingredients by pressing the tab. An ingredient can be deleted from the order by clicking on the ingredient to select it, then clicking the Delete button.

Ingredients:			Delete	New
Item	Quantity	UOM	Per	
FREAMEINE	1000	ml	Order	
DEXTROSE 70%	1000	ml	Order	
MVI-12	10	ml	Order	
HYPERTHYTE CR	40	ml	Order	

**Figure 4-11. Editing an Ingredient**

To edit an ingredient, double click on the ingredient, then click the Edit button to the right of the list of ingredients. The 'Edit New Ingredient' dialog will open (Figure 4-12). Make the necessary changes and click the Save button. After you have made your changes click the 'OK' button to save. You can cancel any changes by clicking the 'Cancel' button.

**Edit New Ingredient**

Item:	Amino Acid
*Quantity:	<input type="text" value="5"/>
*UOM:	<input type="text" value="%"/>
*Per:	<input type="text" value="Order"/>
<b>Save</b> <b>Cancel</b>	

**Figure 4-12. Edit Ingredient Dialog**

To add an ingredient, click the New and select an ingredient from the Item dropdown. Enter the appropriate Quantity, UOM, and Per option and click OK to save (see figure 4-13). Click 'Cancel' to cancel the entry.

**Add New Ingredient**

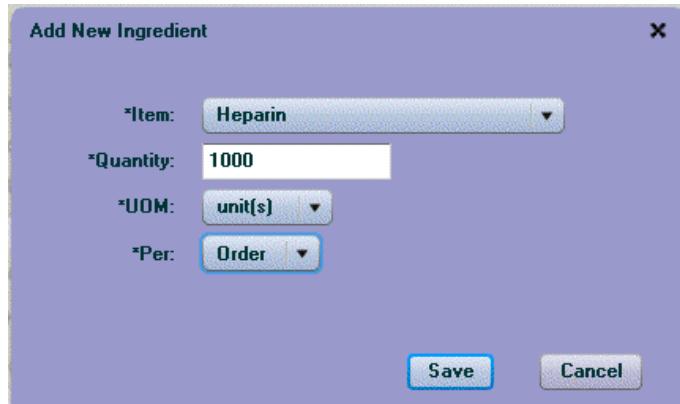
\*Item: Heparin

\*Quantity: 1000

\*UOM: unit(s)

\*Per: Order

**Save**    **Cancel**



**Figure 4-13. Adding a New Ingredient.**

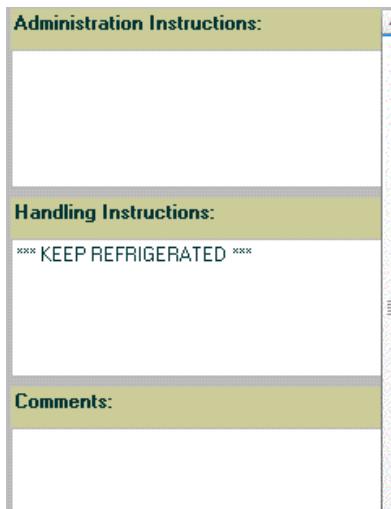
#### 4.1.9 Instructions/Comments

After you have completed entering the ingredients you can add administration and handling instructions that will appear on the TPN label (Figure 4-14). You can also add comments to an order in the Comments field. Comments are for user information only and do not appear on the label. If an order has an entry in the comments field, the order will be flagged with a red checkmark to the right of the Order Status on the main screen.

**Administration Instructions:**

**Handling Instructions:**  
\*\*\* KEEP REFRIGERATED \*\*\*

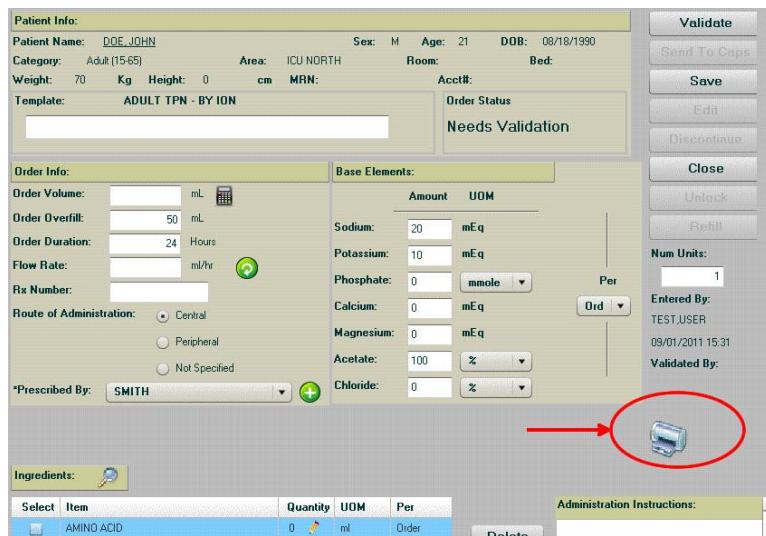
**Comments:**



**Figure 4-14. Administration/Handling Instructions and Comments**

#### 4.1.10 Printing an Sample Label Report or Sample Label

After entering and validating your order you may print a sample label for double checking purposes. To print the sample label click on the printer icon on the right hand side of the Order Entry screen (see figure 4-15).



**Fig 4-14. Printing a Sample Label**

Alternatively, you may print a sample label from the Main screen by clicking on the print icon to the left of the order (see fig 4-16).

<input type="checkbox"/>	Patient Name	Area	Room	Patient ID	MRN	Wt KG	Cust Rx#	Bag #	Product Grp	Prescribed By	Order Status
<input checked="" type="checkbox"/>	ADULT, TEST	ICU		2134456	4456879		2918-25	2918-30	T	MD	Released to CAPS
<input checked="" type="checkbox"/>	ADULT, TEST	ICU		2134456	4456879		2918-21	2918-29	T	MD	Released to CAPS

**Fig 4-16 Printing a Sample Label from the Main Screen.**

If you are a user that does not have order validation privileges (e.g. Technician or Clinician User) you may print an Sample Label Report for an unvalidated order by clicking on the same printer icon used for printing sample labels. This report will contain the order information necessary for performing a double check.

## 4.2 Processing a New Order

Orders are processed using the buttons on the right hand side of the Order Entry screen. See section 5.3 for instructions on how to process your new order.

## 4.3 Entering a Minimum Volume Order

If you want to enter orders using the 'Minimum Volume' you must make certain that your CAPS pharmacy has set your order template to process minimum volume orders. To enter a minimum volume order, leave the Order Volume and Rate fields blank. Enter your ingredient information and validate your order. The Order Volume and Rate will appear on your sample label.

#### 4.4 Changing a Patient Weight

If you want to edit or re-submit an order that contains weight based ingredients, you may need to edit the patient weight so that the order is calculated with the most current weight. Any patient orders that have weight based ingredients will have the weight highlighted in red in the Patient List view (see Figure 4-17). To edit the patient weight before processing an order, double click on the order from the Patient List, and select ‘Patient View’. Edit the patient weight and click the Save Changes button. The updated weight should be visible in the Patient View window. Double click on the order and select ‘Prescription View’ to edit and process your order.

4 All Orders		0 Yesterday's Orders		2 Ready To Send		All Inactive Patients		Refresh	
0 With Clinician		4 Today's Orders		2 Released To Caps		All Active Patients		Send To Caps	
0 Needs Validation				0 Received By Caps					
<input type="checkbox"/>	Patient Name	Area	Room	Acct.#	Wt KG	Bag #	PG	Order Status	
<input type="checkbox"/>	BROWN, KELLY M	BACK YARD	102	12345	54.43	1005-73	T	Ready to Send	
<input type="checkbox"/>	DOE, JANE	ICU SOUTH			70	1005-69	T	Released to CAPS	
<input type="checkbox"/>	DOE, JOHN	3W			75	1005-67	T	Released to CAPS	
<input type="checkbox"/>	PATIENT, NEO				1.5	1005-70	T	Ready to Send	

Figure 4-17. Weight Based Order in Patient View

# 5. Managing Orders

## Module Function Overview

- ◆ Opening an order from the Patient List Screen (Home screen).
- ◆ Order Status
- ◆ Saving, Validating, and Sending Orders to CAPS
- ◆ Creating New Order from Existing Orders and Refilling Orders
- ◆ Discontinuing Orders

The screenshot shows the CAPS Patient List interface. At the top, there's a logo for 'CAPS® Central Admixture Pharmacy Services, Inc.' and two small images of healthcare professionals. Below the header, it says 'Sample Customer' and 'CAPS: 888-888-8888'. The main title is 'Patient List - All Active Orders'. On the left, a sidebar menu includes 'Patient Mgmt' (Patient List, New Patient, Patient Detail), 'Prescription Mgmt' (Prescription Detail, New Prescription, Order Profile, Order Summary, View Errors, Cefot Curves, Reports, Released To CAPS), and 'Reports'. The main content area displays a table of current orders:

	Patient Name	Area	Room	Patient ID	MRN	Wt KG	Cust Rx#	Bag #	Product Grp	Prescribed By	Order Status
<input type="checkbox"/>	ADULT, TEST	ICU				2918-25	2918-25	T	MD	Released to CAPS	
<input type="checkbox"/>	ADULT, TEST	ICU				2918-22	2918-22	T	CPOE, TEST	With Clinician	
<input type="checkbox"/>	ADULT, TEST	ICU				2918-21	2918-21	T	MD	Ready to Send	
<input type="checkbox"/>	GERIATRIC , TEST	ICU				2918-19	T	MD		Needs Validation	
<input type="checkbox"/>	test, patient	NICU				3.00	2918-20	2918-20	T	MD	Needs Validation

Figure 5-1. Patient List – Current Orders view

## 5.1 The Patient List

A list of current orders is displayed in the Patient List (Home) screen when you first log into CAPSLink (Figure 5-1). You may filter this list by clicking on the appropriate link at the top of the page. For example, to list only yesterday's orders click on the 'Yesterdays Orders' link at the top of the page. You may also display a list of All Active Patients and All Inactive patients by clicking on the appropriate link. To return the list of current orders click on the All Orders Link.

From the Patient List you may refill, edit, validate, and discontinue orders.

To open an order in the Order List click anywhere on the Patient's Order. When prompted, click on Prescription View to open the order screen.

## 5.2 Order Status

The right hand column of the Order List displays the order's status.

### Yesterdays Order

This order was entered into CAPSLink yesterday. The order can be opened and edited (click 'Edit' button) to create a new order for the current day. You can also refill the order by opening it and clicking on the 'Refill' button.

### With Clinician

The order has been entered and saved by a Clinician user. The order can be reopened and edited by any Clinician user. The Clinician user must click on the 'Send to Pharmacy' button to make it available for validation by a pharmacist.

### Needs Validation

Order has been entered and saved but requires validation and will need to be released to CAPS before the order can be filled by your CAPS pharmacy.

### Released to CAPS

Indicates that the order has been approved and released to CAPS for order processing.

### Received by CAPS

Order has been received by your CAPS pharmacy and is currently being compounded. Note: If you need to change an order that has already been received by CAPS, contact the pharmacy to let them know that you will be sending a new order.

### Ready to Send

Order has been validated and is ready to send to the CAPS pharmacy for compounding.

## 5.3 Order Processing

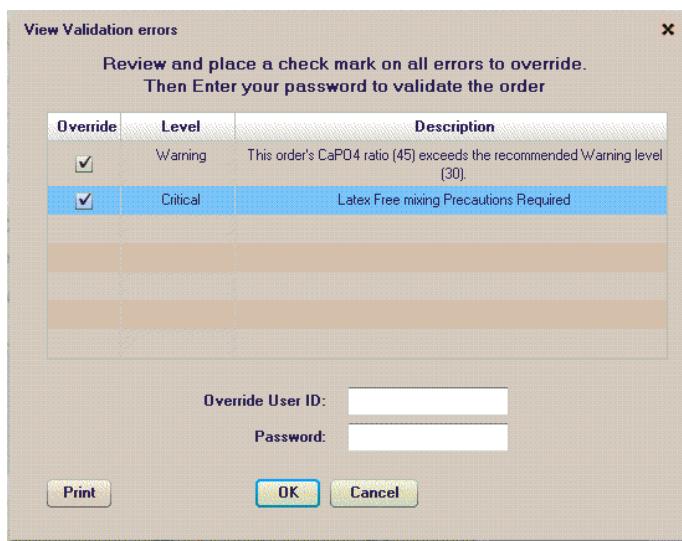
While entering and editing orders there are several buttons available on the right hand side of the Order maintenance screen that allow you to process an order:

**Save**

The 'Save' button allows you to save an order in its current state. A saved order can be accessed later for editing by clicking the 'Unlock' button or can be validated and sent to CAPS (see sections below).

**Validate**

After completing an order click the 'Validate' button to validate an order. CAPSLink will screen the order for proper dosing, allergies, incompatibilities, etc. and display appropriate warnings to the user. A user with appropriate privileges can override these warnings by checking the checkbox next to each warning and entering a username and password at the bottom of the validation screen and clicking the 'OK' button (figure 5-2). To cancel validation click the 'Cancel' button. After validation is complete you can send the order to CAPS by clicking the 'Send to CAPS' button from within the order or you can send it to CAPS from the TPN Management screen (see section 5.4).



**Fig 5-2**

**Send to CAPS**

After validating an order it will be available for sending to CAPS. Click this button to make the order available for import by your CAPS pharmacy. Alternatively you can send a group of orders to CAPS from the TPN Management screen (see section 5.4).

**Edit**

After opening an order you can click on the 'Edit' button to create a new order containing all the same information as the previous order. If the previous order was active it will be automatically discontinued.

**Close**

To close an order and discard all changes click the 'Close' button.

**Refill**

An order from the previous day can be repeated by clicking the Refill button. This creates a copy of the order and brings the user directly to the order validation window.

**Discontinue**

To discontinue an order click the Discontinue button.

## 5.4 Sending Orders to CAPS from the Patient List

After you validate an order it will be ready to send to CAPS for compounding. An order can either be sent to CAPS from the Order Entry window or from the Patient List screen by clicking the checkbox to the left of the order and clicking the 'Send to CAPS' button (Fig 5-3). Orders can be sent to CAPS in batches by clicking the 'Select All' checkbox at the top of the checkbox column and then clicking the Send to CAPS button.

Patient List - All Active Orders										
Patient Mgmt			All Orders			Yesterday's Orders			Ready To Send	
Patient List	4	All Orders	0	With Clinician	4	Today's Orders	0	Released To Caps	All Active Patients	Adults
New Patient	0	With Clinician	4	Today's Orders	0	Released To Caps	0	Received By Caps	All Inactive Patients	Neonates
Patient Detail	1	Needs Validation	0	Received By Caps	0	Received By Caps	0	Patients by MRN	Pediatrics	Orders Completed
Prescription Mgmt										
Prescription Detail										
New Prescription										
Order Profile										
Order Summary										
View Errors										
CapOff Curves										

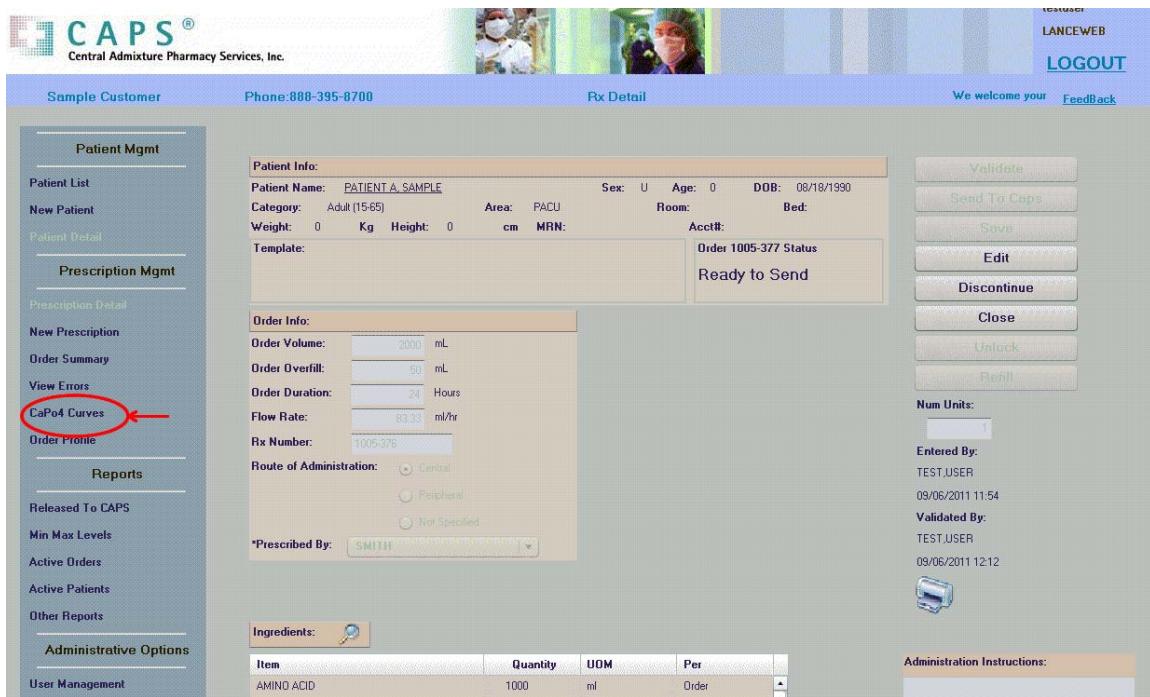
**Fig 5-3 Sending Orders to CAPS – Patient List Screen**

Below the 'Send to CAPS' button is the **'Orders Completed' button**. This allows you to send a notification to your CAPS pharmacy when you are done entering orders for the day. After the confirmation has been sent the button will change to a red color (requires a screen refresh). If you send the Orders Confirmation and you get another late order, you can re-click the Orders Completed button to update the count for CAPS.

**\*\*Important\*\*** - Before you re-click the 'Orders Completed' button, be sure to contact your CAPS pharmacy to verify that they can fulfill your additional order.

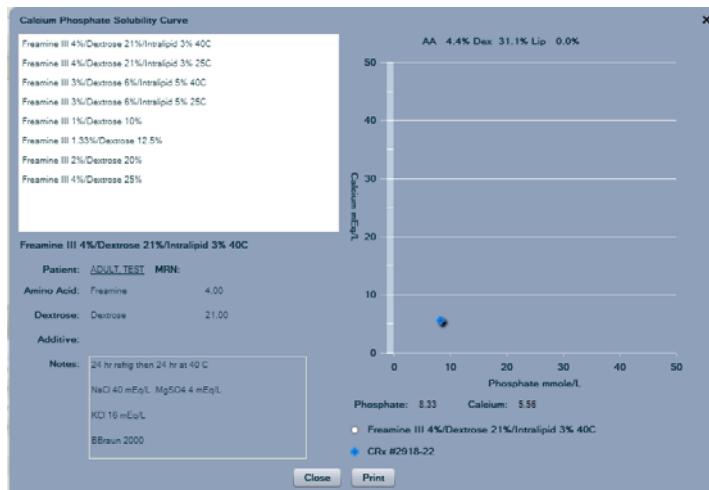
## 5.5 Calcium Phosphate Solubility

You can compare known calcium phosphate solubility curves against an open TPN order by clicking on the CaPO4 Curves link in the left navigation pane (Fig 5-4).



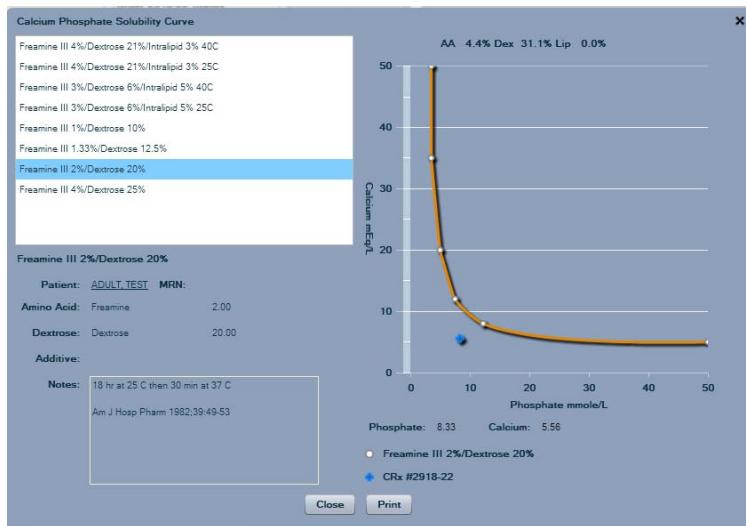
**Fig 5-4 Link to Calcium Phosphate Curves**

After clicking on the CaPO4 link, a window will open that displays the current order's amino acid, dextrose, and lipid concentration in the graph title on the right. The concentration of calcium and phosphate for the current order will be plotted on the graph as a red star (Fig 5-5).



**Fig 5-5 Calcium Phosphate Concentration Plot**

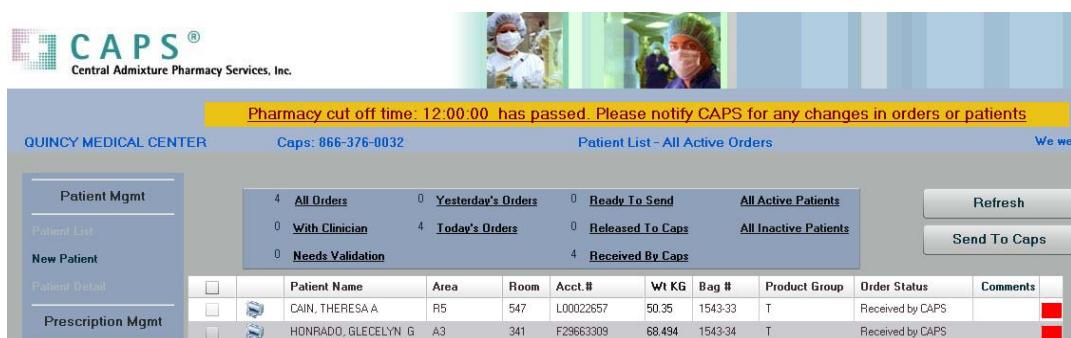
A list of known curves are available on the left hand side of the window. To view a curve in the graph on the right, scroll down to the appropriate curve (i.e. the curve that most closely matches the amino acid, dextrose, and lipid concentration in your order) and click on it. The curve will appear on the calcium phosphate graph on the right (Fig 5-6).



**Fig 5-6 Calcium Phosphate Curve – Sample Curve**

## 5.6 Pharmacy ‘Cut-Off’ time

Your CAPS pharmacy may choose to employ a ‘Cut-off’ time for order submissions. When a user opens an order or a patient profile after the order cut-off time has passed, a warning message will display in the upper portion of the screen (see Fig 5-7). If you need to place orders after the cut-off time you will need to notify your CAPS pharmacy by phone.



**Fig 5-7 Pharmacy Cut-Off Time**

## 5.7 Other Prescription Management Functions

### 5.7.1 Order Summary

After an order is saved you can view/print the order's nutritional information by clicking on the 'Order Summary' link in the left hand navigation pane (Fig 5-8).

The screenshot shows the 'Order Summary' dialog box. At the top, it displays 'Patient: ADULT, TEST' and 'Rx Number: 2918-22'. The main section contains nutritional data:

Order:	CHO:
Total Kcal: 2224.00	Total Kcal as CHO: 1904.00
Total Kcal / Kg:	gmCHO / Kg:
Protein:	
Total gm: 80.00	Total Kcal as Lipid: 0.00
gmProtein / Kg:	gmLipid / Kg:
% of Total Kcal: 14.39	Nitrogen:
Total Kcal as PRO: 320.00	gm: 12.24
Kcal:N Ratio: 181.70	

Below this, there are two smaller tables for electrolytes and osmolarity:

Approx. Electrolyte:	Ordered (w/o Intrinsics)	Approx. Osmolarity:	2239.83 mOsm/L
Na <sup>+</sup> :	132.00 mEq	Cl <sup>-</sup> :	182.67 mEq
K <sup>+</sup> :	60.00 mEq	PO <sub>4</sub> <sup>3-</sup> :	7.00 mmole
Ca <sup>++</sup> :	10.00 mEq	Ace <sup>-</sup> :	0.00 mEq
Mg <sup>++</sup> :	10.00 mEq		

Ca PO <sub>4</sub> Ratio:	9
---------------------------	---

At the bottom are 'Print' and 'Close' buttons.

Fig 5-8 Order Summary

### 5.7.2 View Errors

After an order has been validated you can view the messages that were previously displayed at validation by clicking on the 'View Errors' link in the left hand navigation pane.

### 5.7.3 Order Profile

After an order is saved you may view detailed information regarding the order by clicking on the 'Order Profile' link in the left hand navigation pane.

#### 5.7.4 Exporting Order Text

The contents of your order can be copied as text to the clipboard and then pasted into another application by clicking on the 'Export Order' button.

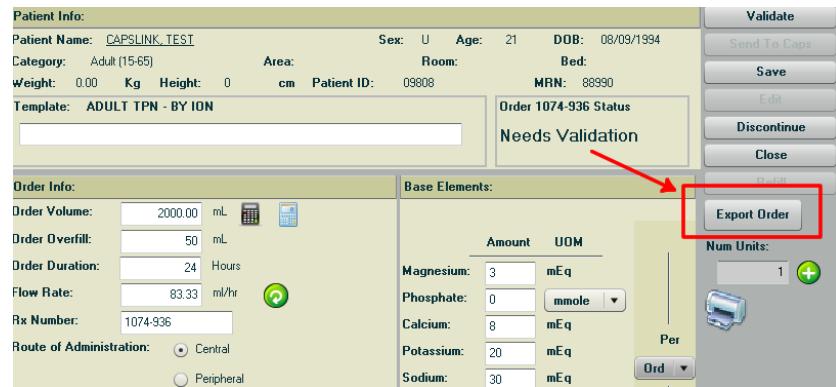


Figure 5-9 Export Order Text

A window displays showing the exported order text and a button you can click to copy the text to the clipboard.

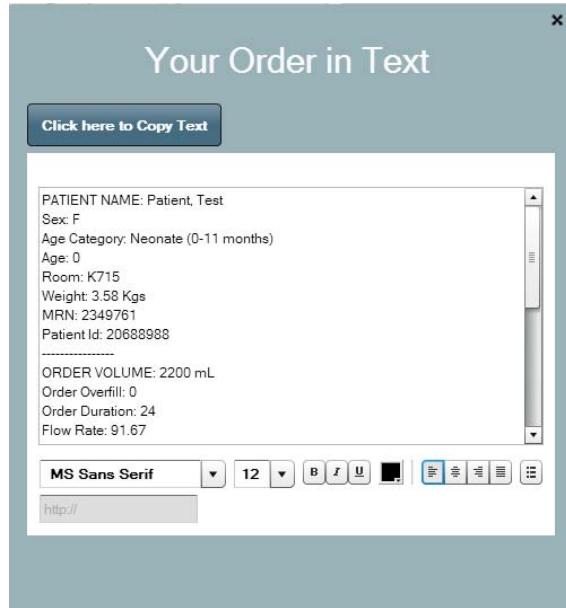


Figure 5-10 Export Order Text Dialog

## 6. Released to CAPS Window

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### 6.1 Released to CAPS Window

Clicking the 'Released to CAPS' link in the left hand navigation pane will display a list of all orders that have been released to CAPS (Fig 6-1). The view defaults to the current date but a different date range can be entered as needed. Click on the 'Print' button to print a Released to CAPS Report (Fig 6-2). The order can be opened by double clicking an order and a sample label can be printed by clicking on the printer icon and the far left hand side of the order.

The screenshot shows a software interface titled 'Released to CAPS'. At the top, there are buttons for 'PDF' and 'Excel'. Below that is a search bar with 'From: 01/30/2014' and 'To: 01/30/2014'. There are also 'Search', 'Print', and 'Close' buttons. The main area is a table with the following columns: Bag #, Cust Rx, Patient, Patient ID, MRN, Queued Dat, Product Grou, Status, and Status Date. The data in the table is as follows:

	Bag #	Cust Rx	Patient	Patient ID	MRN	Queued Dat	Product Grou	Status	Status Date
1	2918-29-0-1	2918-21	ADULT , TEST	2134456	4456879	01/30/2014	TPN ADULT	Released to CAPS	01/30/2014
2	2918-22-0-1	2918-22	ADULT , TEST	2134456	4456879	01/30/2014	TPN ADULT	Released to CAPS	01/30/2014
3	2918-30-0-1	2918-25	ADULT , TEST	2134456	4456879	01/30/2014	TPN ADULT	Released to CAPS	01/30/2014
4	2918-31-0-1	2918-26	MD , NAME	659879	543321	01/30/2014	TPN ADULT	Released to CAPS	01/30/2014

Fig 6-1 Released to CAPS window

The screenshot shows a report titled 'Sample Customer Released To CAPS Report' generated on '01/30/2014 16:06'. The report details are as follows:

CAPS Fax#: 999-999-9999

Rx#	Patient Name	Patient Id	MRN	Weight Kg	Area	Room	Bag ID	Status	Date
2918-21	ADULT , TEST	2134456	4456879		ICU		2918-29-0-1	Released to CAPS	01/30/2014 15:59
2918-22	ADULT , TEST	2134456	4456879		ICU		2918-22-0-1	Released to CAPS	01/30/2014 15:59
2918-25	ADULT , TEST	2134456	4456879		ICU		2918-30-0-1	Released to CAPS	01/30/2014 15:59
2918-26	MD , NAME	659879	543321				2918-31-0-1	Released to CAPS	01/30/2014 15:59
<b>Grand Total</b>	<b>4</b>								

Fig 6-2 Released to CAPS Report

## 7. Reports

---

### Module Function Overview

- ◆ Description of CAPSLink Reports
- ◆ Displaying and Printing CAPS Reports

Several reports are available from your CAPSLink application. The reports can be displayed and printed by clicking on the Reports links in the Navigation Bar on the left hand side of the CAPSLink main screen.

### 7.1 Released to CAPS

Displays a list of orders that have been released to CAPS. The date range defaults to the current day but can be changed by entering a new date range and clicking the 'Search' button. Click the 'Print' button to display a preview of the report in a printable 'pdf' format.

### 7.2 Min/Max Levels

Displays a list of Minimum and Maximum dose settings for all CAPSLink ingredients. When an order is validated a warning message will display if an ingredient amount is above or below these settings.

### 7.3 Active Orders

Displays a list of active orders

### 7.4 Active Patients

Displays a list of active patients

## 7.5 Other Reports

Clicking the 'Other Reports' link displays a window that allows you to select from several reports that can be filtered by date range (Figure 7-1). Select the desired report in the report dropdown on the left, edit the date range if necessary, and click the Search button to display the report. Click the 'Print' button to display the report in a printable 'pdf' format.

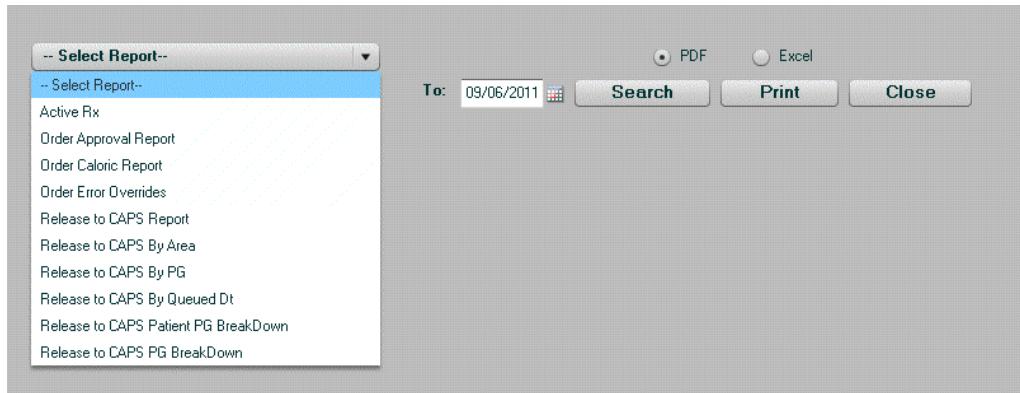


Figure 7-1. Other Reports Screen

### 7.5.1 Order Approval Report

In the 'Other Reports' section you will find the Order Approval Report. This report contains a record of which user entered, approved, and released each order (Fig 7-2).

Test Customer							8/31/2010
Orders Entered Between 08/24/10 and 08/24/10							
Rx#	Status	Product Group	Patient	Entered	Approved	Released	
1002-362	Yesterdays Order	TPN ADULT	DOE, JANE	Winjous, Mr. 08/24/10 11:59	zTest Pharmac 08/24/10 12:00	User 1, Validatic 08/24/10 12:00	zTest Pharmacy 08/24/10 12:00
1002-364	Yesterdays Order	TPN ADULT	Brown, Dennis	zTest Pharmac 08/24/10 13:29	zTest Pharmac 08/24/10 13:29	zTest Pharmac 08/24/10 13:29	zTest Pharmacy 08/24/10 13:29
1002-365	Discontinued	TPN ADULT	PATIENT, NEO	zTest Pharmac 08/24/10 13:31	zTest Pharmac 08/24/10 13:31	zTest Pharmac 08/24/10 13:31	
1002-366	Discontinued	TPN ADULT	PATIENT, NEO	zTest Pharmac 08/24/10 13:32	zTest Pharmac 08/24/10 13:34	zTest Pharmac 08/24/10 13:34	
1002-367	Discontinued	TPN ADULT	PATIENT, NEO	zTest Pharmac 08/24/10 13:35	zTest Pharmac 08/24/10 13:37	zTest Pharmac 08/24/10 13:37	
1002-368	Yesterdays Order	TPN ADULT	PATIENT, NEO	zTest Pharmac 08/24/10 13:38	zTest Pharmac 08/24/10 13:39	zTest Pharmac 08/24/10 13:39	zTest Pharmacy 08/24/10 13:40

Fig 7-2 Order Approval Report

### **7.5.2 TPN Statistics Report**

In the 'Other Reports' section you will find the TPN Statistics Report. This report generates a daily total count of TPNs ordered for the specified date range. (Fig 7-3)

<b>Sample Customer TPN Statistics Report From 1/1/2014 to 1/30/2014</b>						
<b>Date</b>	<b>Site</b>		<b>Patient Type</b>			<b>Total Made</b>
	<b>Cent.</b>	<b>Periph.</b>	<b>Adult</b>	<b>Neo</b>	<b>Peds</b>	
01/16/2014	1	0	1	0	0	1
01/17/2014	1	0	1	0	0	1
01/20/2014	1	0	1	0	0	1
01/28/2014	0	1	1	0	0	1
01/29/2014	0	1	1	0	0	1
<b>Totals</b>	<b>3</b>	<b>2</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>
<b>Avg/day</b>	<b>0.6</b>	<b>0.4</b>	<b>1.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.0</b>

**Fig 7-3 TPN Statistics Report**

## 8. Drug Delivery

The Drug Delivery module allows you to order anticipatory compounded products from your CAPS pharmacy via the Internet. The items that you are able to order via CAPSLink will be determined by your CAPS Pharmacy.

### Module Function Overview

- ◆ Accessing the Drug Delivery Module
- ◆ Placing a Drug Delivery Order
- ◆ Drug Delivery Order Management

### 8.1 Accessing the Drug Delivery Module

You can access the Drug Delivery module either by clicking on the ‘Drug Delivery’ option when first logging into CAPSLink or by clicking on the ‘Switch to Drug Delivery Link’ in Administrative Option section of the navigation bar. This will bring you to the main screen of the Drug Delivery module (Figure 8-1).

The screenshot shows the CAPSLink interface with a blue header bar. The left sidebar contains a vertical menu with the following options: Sample Customer, CAPS: 888-395-8700, and Drug Delivery. The main content area has a title 'Drug Delivery' at the top right. Below it is a search bar with fields for '222#:' and 'PO Number:', a 'Details' button, and a 'Refresh' button. A table lists various drug items with columns for Product Name, Product #, Units/CASE, Cases, Ordered Today, and a status indicator. The last two rows show 'FENTANYL 25MCG/ML 50ML SYRINGE' and 'Ketamine 10 mg/mL 2 mL SY', both with status 'C-III'.

Product Name	Product #	Units/CASE	Cases	Ordered Today	
Magnesium Sulfate 1gm/50 ml D5W	66647-614-6-	1	0	0	
Magnesium Sulfate 1gm/50ml D5W	66647-614-6-	1	0	0	
magnesium sulfate 6 g/100 ml D5W	66647-6149-11	1	0	0	
Norepinephrine 4 mg/250 mL D5W	66647-6156-33	1	0	0	
Norepinephrine 4mg/250ml D5W	66647-615-6-	1	0	0	
Oxytocin 10 units/500 mL D5LR	66647-6136-44	1	0	0	
Oxytocin 10 units/500 mL LR	66647-613-6-	1	0	0	
Oxytocin 10 units/500ml NS	66647-6141-44	1	0	0	
Oxytocin 30 units/500 mL D5LR	66647-6132-44	20	0	0	
Oxytocin Test		1	0	0	
Phenylephrine 20mg/250ml NS	66647-7111-33	1	0	0	
pot. phosphate 4.4 meq K/3 mmol PO4/mL		1	0	0	
Sodium Bicarb 150meq / 1L D5W	71100000B	20	0	0	
Ketamine 10 mg/mL 2 mL SY	66647-3022-11	1	0	0	C-III
FENTANYL 25MCG/ML 50ML SYRINGE	66647-2002-94	1	0	0	C-II

Figure 8-1. Main Screen – Drug Delivery Module.

To view a detailed description of a product click the checkbox to the left of the item and click the Details button at the top of the screen (Figure 8-2).

Note: If a product name does not appear as expected, contact your local CAPS Pharmacy and they can add new items to your list.

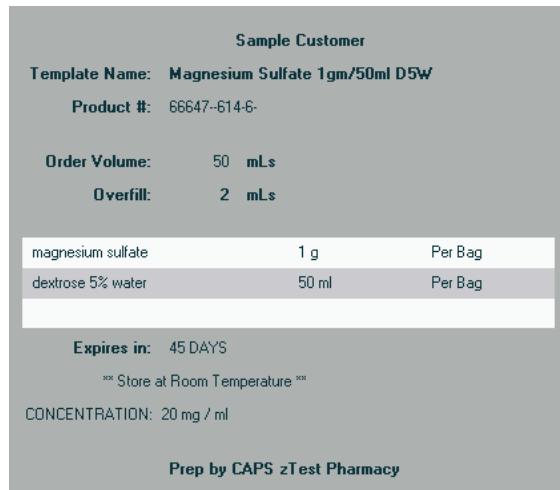


Figure 8-2. Product Detail

## 8.2 Placing a Drug Delivery Order

To place a Drug Delivery order, enter the desired quantity of each product in the ‘Cases’ field on the right hand side of the main screen. After you have finished entering the quantities of all the products you want to order, click on the ‘Place Order’ button. The Verify Drug Delivery Order window will open (Figure 8-3).

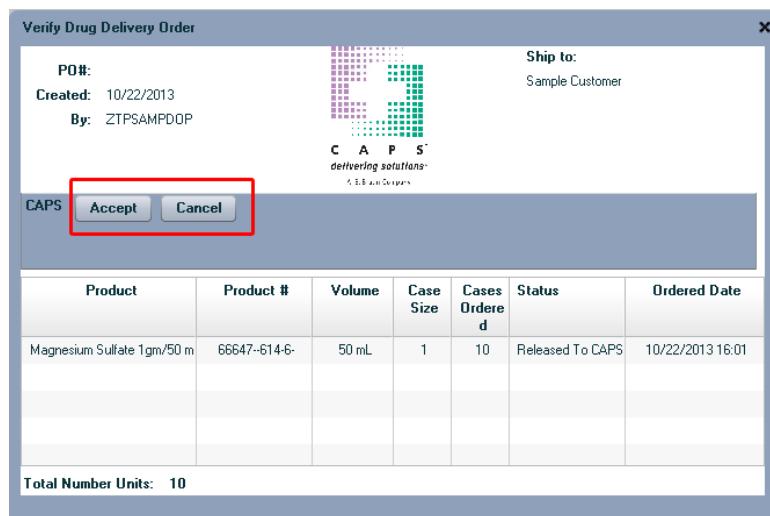
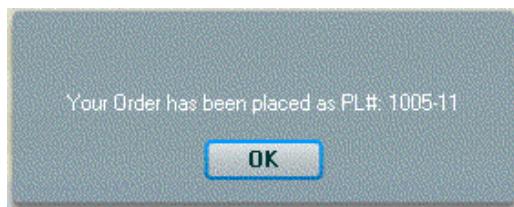


Figure 8-3. Verify Drug Delivery Order Window

Click on the 'Accept' button to verify the order and send it to your CAPS pharmacy. Click on the 'Cancel' button to cancel the order. Once the order has been successfully placed, an order confirmation number will display (Figure 8-4).



**Figure 8-4. Drug Delivery Order Confirmation**

After clicking the 'OK' button, a sample packing list will display. You may print a copy of this packing list for your records by clicking on the 'Print' button.

### 8.3 Drug Delivery Order Management

The number of cases that have been previously ordered during the day is listed in the 'Ordered Today' column on the main Drug Delivery Order screen (Figure 8-5). This allows the user to determine what quantities have already been requested by CAPS to avoid duplicating orders.

	Product Name	Product Code/NDC	Units/CASE	Cases	Ordered Today	
<input type="checkbox"/>	magnesium sulfate 6 g/100 ml D5W	66647-6149-11	1	0	10	
<input type="checkbox"/>	oxytocin 10 units/1000 ml D5LR	66647-6129-59	1	0	15	
<input type="checkbox"/>	Oxytocin 10 units/500 ml LR	66647-6136-44	1	0	0	
<input type="checkbox"/>	FENTANYL 25MCG/ML 50ML SYRINGE	66647-2002-94	1	0	0	C-II
<input type="checkbox"/>	FENTANYL 5MCG/ML 30ML SYRINGE	66647-2000-73	1	0	0	C-II

**Figure 8-5. Units Ordered Today**

### 8.3.1 Order History and Order Tracking

You may view a history of Drug Delivery Orders by clicking on the 'History' link in the Order Management section of the main navigation bar (Figure 8-6). You can also view the shipping status of your order and track the FedEx shipment by clicking on the FedEx tracking link in the left hand column of the order history.

Order History							
Order Number/Product	Product #	Volume	Case Size	Cases Ordered Today	Status	Status Date	FedEx Tracking
SAMP Vanco 617433	66647-6174-33	0 mL	40	1	Shipped	09/22/2014 02:30	<a href="#">Track Shipment</a>
<b>Order Number:</b> <a href="#">99-40811</a>							
<b>Order Placed:</b> 09/16/2014 <b>By:</b> ZTPSAMPDOP <b>PO Number:</b>							
SAMP Cal Gluc 611800	66647-6118-00	50 mL	1	10	Shipped	09/22/2014 02:38	<a href="#">Track Shipment</a>
<b>Order Number:</b> <a href="#">99-40809</a>							
<b>Order Placed:</b> 09/16/2014 <b>By:</b> ZTPSAMPDOP <b>PO Number:</b>							
SAMP Vanco 617433	66647-6174-33	0 mL	40	1	Shipped	09/22/2014 02:30	<a href="#">Track Shipment</a>
<b>Order Number:</b> <a href="#">99-40809</a>							
<b>Order Placed:</b> 09/16/2014 <b>By:</b> ZTPSAMPDOP <b>PO Number:</b>							

Figure 8-6. Drug Delivery Order History

A list of all orders that have been released to CAPS can be displayed by clicking on the 'Released to CAPS' link on the navigation bar. Both lists can be filtered by date range by entering the desired date range in the 'From' and 'To' fields and clicking the 'Search' button. A printable 'pdf' of the report can be displayed and printed by clicking on the 'Print' button (figure 8-7).

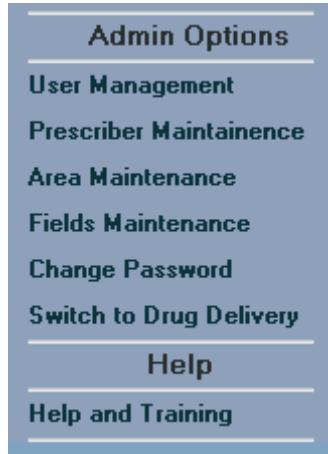
Bag #	Cust Rx	Patient	Patient ID	MRN	Queued Date	Product Group	Status	Status Date
1005-450-0-10	1005-450				10/14/2014	pot phosphate 1	Released to CAPS	10/14/2014

Figure 8-7. Released to CAPS Report

## 9. Maintenance/Help

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**Users, Physicians, and Patient Areas** can be added, removed, or inactivated from the Administrative Options menu in the lower left hand portion of the Navigation pane (Figure 9-1). These areas are accessible only to Admin level users. See section 1.3 for more information on adding and editing User Profiles.



**Figure 9-1 Administrative Options**

In the **Fields Maintenance** window Admin users can toggle various fields in the Patient profile to be required or optional. Also some fields can be disabled or enabled in this screen as well..

Window/Caps - System Required	Not-Required Fields	Required Fields
▼ ORDER		
System Required		Prescribed By
▼ PATIENT		
Don't Require		MRN
System Required		Last Name
System Required		First Name
Don't Require		Birth Date
System Required		Age Category
Require	Patient ID	
Window/Caps - Customization	Enabled Fields	Disabled Fields
▼ PATIENT		
Disable	Height	
Disable	Weight Kg	
Enable		Weight Lb
Disable	Patient Id	
Disable	MRN	

**Fig 9-2 Fields Maintenance Window**

A training manual, online help, and training videos (Figure 9-3) can be accessed from the Help and Training link in the lower left of the Navigation pane.

The screenshot shows the CAPS® Central Admixture Pharmacy Services website. At the top, there is a logo with the letters 'CAPS' in a stylized font, followed by the text 'Central Admixture Pharmacy Services'. Below the logo are two small photographs of people in medical scrubs and masks. The main content area has a blue header bar with a computer monitor icon and the text 'CAPS Link Online Help/Training'. Below this, a descriptive paragraph reads: 'The links below will allow you to view an online help file or download it to your computer. There are also several video modules demonstrating the CAPS® Link Internet order entry system. If you have any questions, please contact your local CAPS® Pharmacy and we can answer any questions.' A vertical sidebar on the left contains several links with icons: 'Online Help' (info icon), 'Download Training Manual' (book icon), 'Release Notes' (calendar icon), 'Training Videos' (camera icon), 'Getting Started' (play icon), 'Order Processing' (play icon), and 'Order Analysis' (play icon).

- [Online Help](#)
- [Download Training Manual](#)
- [Release Notes](#)
- [Training Videos](#)
  - [Getting Started](#)
  - [Order Processing](#)
  - [Order Analysis](#)

**Figure 9-3**

## 10. Appendix 1 – Order Flow Sheets

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The following pages contain “Flow Sheets” that serve as a quick, easy to follow reference for various types of order processing. These sheets can be copied and placed next to a computer workstation for quick reference.

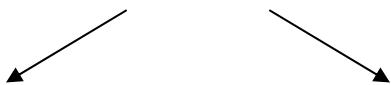
## **10.1 Flow Sheet - Refilling an Order**

**From the Patient List Click on the Order. Open Prescription View**

	Patient Name	Area	Room	Acct.#	Wt KG	Bag #	PG	Order Status	
<input type="checkbox"/>	DOE, JANE	ICU SOUTH			70	1005-69	T	Released to CAPS	
<input type="checkbox"/>	DOE, JOHN	3W			75	1005-67	T	Released to CAPS	



**Verify Order contents**



**OR**



**Review Validation Messages**

**Enter User ID and Password**

**OK**



**Order Filled: thank you.**



**Close**



**Review Validation Messages**

**Enter User ID and Password**

**OK**



**Send to CAPS**

\*\* Orders can be sent to CAPS from the order window or the main CAPS Link window.

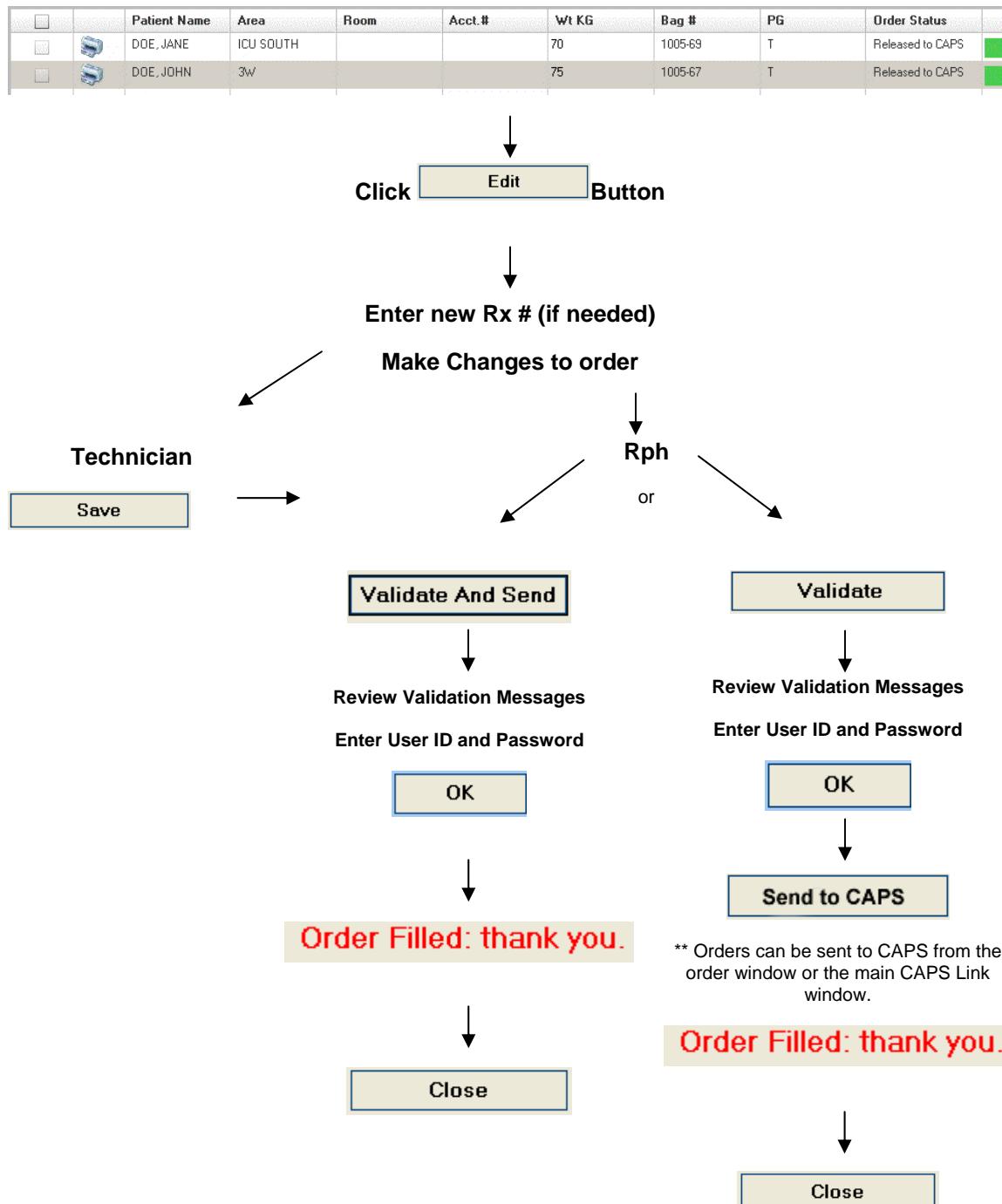
**Order Filled: thank you.**



**Close**

## 10.2 Flow Sheet - Modifying an Order

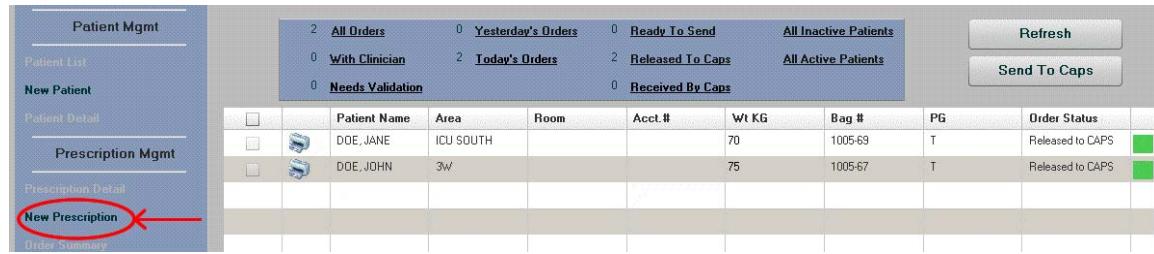
From the Patient List double click on the Order. At the prompt Open Prescription View



\*\* Orders can be sent to CAPS from the order window or the main CAPS Link window.

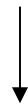
## **10.3 Entering a New Order**

**Click on the “New Prescription” link in the left hand navigation pane.**



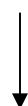
**Select Patient**

This is a 'Patient Info' screen. It has a header 'Patient Info:' and a section labeled 'Patient Name:' containing a dropdown menu with the value 'DOE, JOHN'.



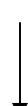
**Select Template**

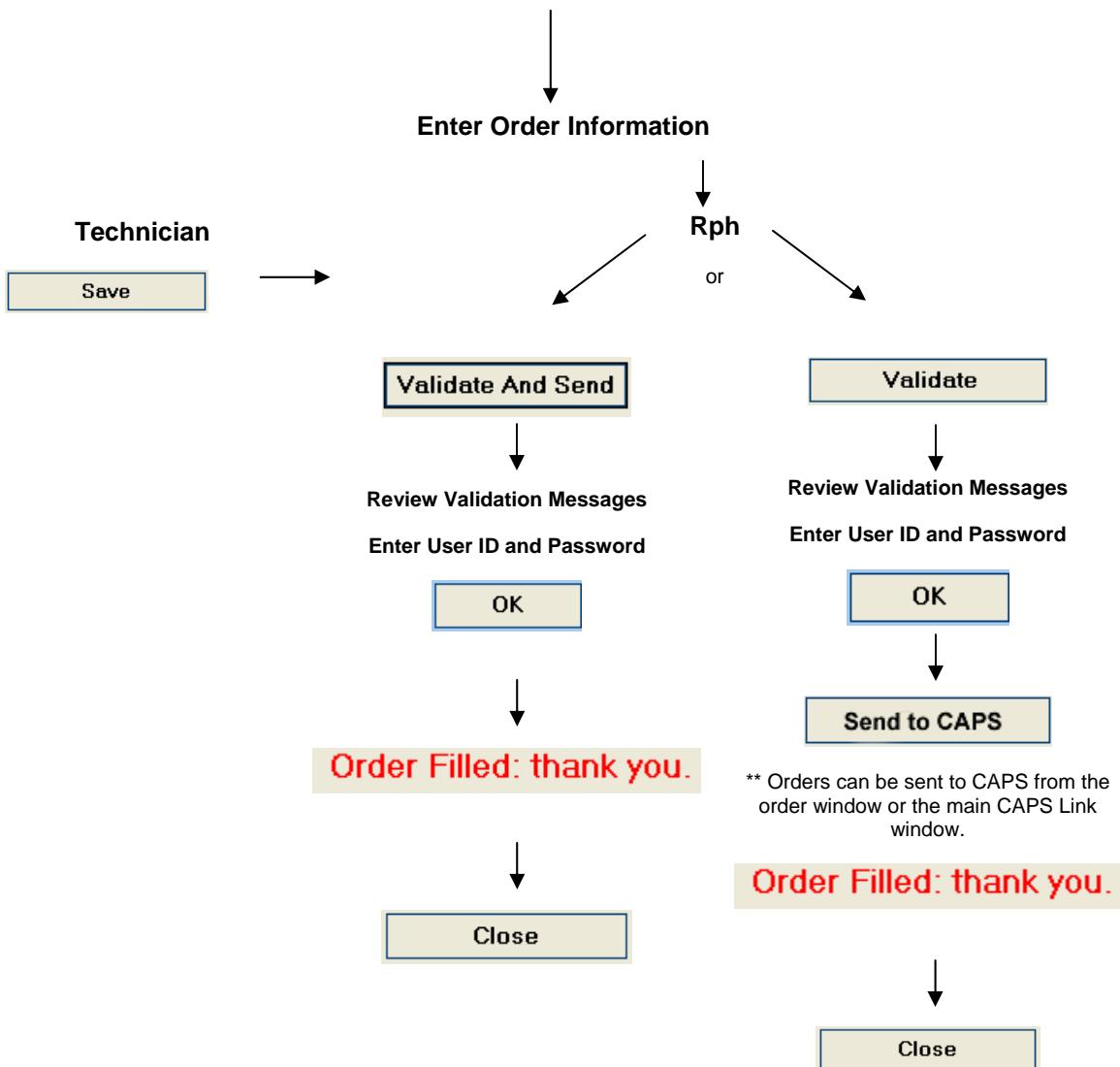
This is a 'Template Name' selection screen. It shows a dropdown menu with the value 'TPN ADULT - BY SALT'.



**Click Next Button**

**Next page**





## 11. Appendix 2 – Placing CSOS Orders

### (CAPS CSOS Customers Only)

If your CAPSLink account has been enabled for CSOS integration you can begin signing your CSOS orders while placing orders in the CAPSLink Drug Delivery module.

1. Begin by logging into CAPSLink and going to the 'Drug Delivery' module.
2. Enter the number of cases you wish to order by entering the quantity in the 'Cases' column.

PO Number:	(ONLY if available)	Place Order					
	Product Name	Product #	Units/CASE	Cases	Ordered Today	DEA Class	Location
<input type="checkbox"/>	Morphine 100 mg added to 100 mL NS	66647-2140-11	24	0 	0	C-II	Denver CS
<input type="checkbox"/>	Hydromorphone 0.2mg/mL in NS 30mL PCA	66647-2210-00	25	0 	0	C-II	Denver CS
<input type="checkbox"/>	Morphine 5 mg/mL in NS 50 mL SY	66647-2041-94	15	0 	0	C-II	San Diego CS
<input type="checkbox"/>	Fentanyl 10 mcg/mL in NS 250 mL	66647-2171-33	12	2 	0	C-II	San Diego CS
<input type="checkbox"/>	Hydromorphone 1 mg/mL in NS 0.6 mL SY	66647-2512-06	50	1 	0	C-II	San Diego CS
<input type="checkbox"/>	MAGNESIUM SULFATE 2GM IN 50 ML D5W	66647-4444-55	1	0 	0		zTest Pharmacy

3. After you have entered all the items for your order click the 'Place Order' button.
4. When the Verify Drug Delivery Order screen appears, review your order for correctness and click the 'Accept' button to proceed with your order.

Verify Drug Delivery Order

PO#:  Created: 10/02/2014 By: ZTPLEGISNDOP

Ship to: ValidOrderSeven



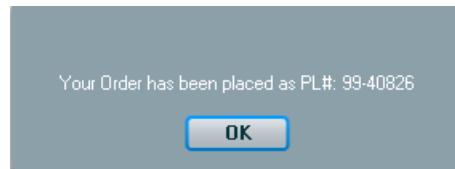
**CAPS**  
delivering solutions.  
A B Braun Company

**CAPS** **Accept** **Cancel**

Product	Product #	Volume	Case Size	Cases Ordered	Status	Ordered Date
Fentanyl 10 mcg/mL in NS 25	66647-2171-33	250 mL	12	2	Need Sign	10/02/2014 09:17
Hydromorphone 1 mg/mL in N	66647-2512-06	0.6 mL	50	1	Need Sign	10/02/2014 09:17

Total Number Units: 3

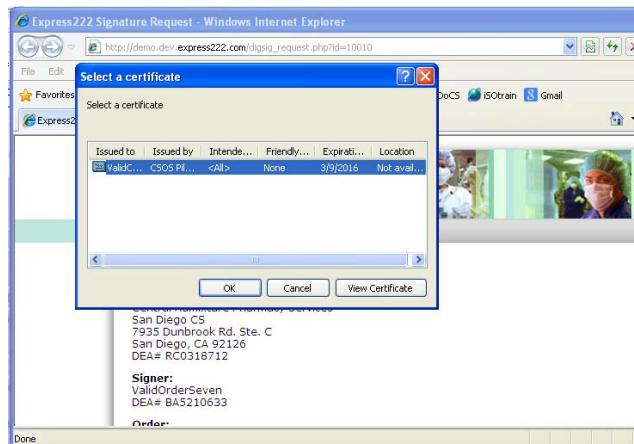
5. A pop-up message will appear indicating that your order has been placed along with the order number.



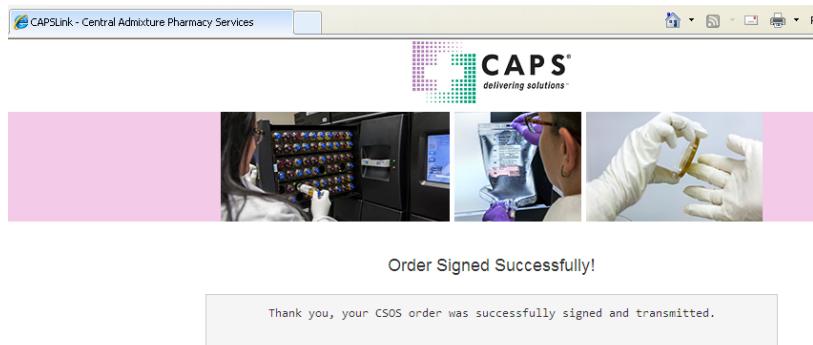
6. A window will display allowing you to either sign the controlled substance orders immediately or to wait and sign the orders later. To sign the order later you will need to retrieve the order from the Order History screen.



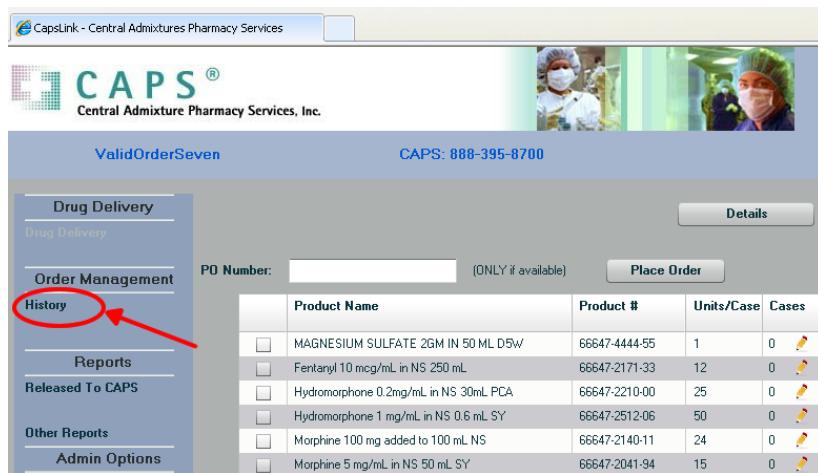
7. At this point another browser window will open and you will be prompted to select your signing certificate.



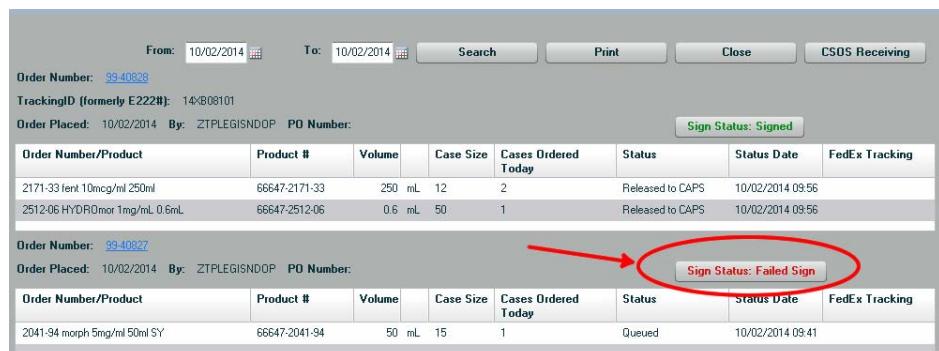
- After selecting your signing certificate click 'OK'. At the password prompt enter your signing certificate password. The system will begin processing your order for signing. This may take several seconds. Please be patient and wait for the system to indicate the signing status before you close the browser window.
- If your order is signed successfully the message pictured below will display.



- If the message indicates that the signing was not successful, or if you opted to sign the order at a later time, you may access the order again through the Order History link on the left hand side of the main screen.



- In the Order History screen a button will be displayed above the order on the right hand side of the screen indicating that the order still needs to be signed. Click this button and you will be allowed to sign your order (see step 7).



## Receiving Orders

1. To receive a CSOS order in CAPSLink you must open the Order History by clicking on the 'History' link at the left hand side of the main screen.

The screenshot shows the CAPSLink interface. At the top, there's a logo for 'CAPS® Central Admixture Pharmacy Services, Inc.' and two small photographs of people in medical scrubs. Below the logo, the text 'ValidOrderSeven' and 'CAPS: 888-395-8700' are displayed. The main menu on the left includes 'Drug Delivery', 'Order Management' (with 'History' highlighted), 'Reports', 'Released To CAPS', 'Other Reports', and 'Admin Options'. The 'Order Management' section contains a table with product information:

	Product Name	Product #	Units/CASE	Cases
<input type="checkbox"/>	MAGNESIUM SULFATE 2GM IN 50 ML D5W	66647-4444-55	1	0
<input type="checkbox"/>	Fentanyl 10 mcg/mL in NS 250 mL	66647-2171-33	12	0
<input type="checkbox"/>	Hydromorphone 0.2mg/mL in NS 30mL PCA	66647-2210-00	25	0
<input type="checkbox"/>	Hydromorphone 1 mg/mL in NS 0.6 mL SY	66647-2512-06	50	0
<input type="checkbox"/>	Morphine 100 mg added to 100 mL NS	66647-2140-11	24	0
	Morabine Fentanyl in NS 50 mL SY	66647-2041-04	15	0

2. From the Order History window click on the 'CSOS Receiving' button in the upper right hand corner.

This screenshot shows the 'Order History' window from the previous step. At the top, there are fields for 'From' (10/02/2014) and 'To' (10/03/2014), followed by 'Search', 'Print', 'Close', and a large red-circled 'CSOS Receiving' button. Below these are sections for 'Order Number' (99-40828), 'TrackingID (formerly E222#)' (14XB08101), and 'Order Placed' (10/02/2014). The main table lists two orders:

Order Number/Product	Product #	Volume	Case Size	Cases Ordered Today	Status	Status Date	FedEx Tracking
2512-06 HYDROmor 1mg/mL 0.6mL	66647-2512-06	0.6 mL	50	1	Released to CAPS	10/02/2014 09:56	
2171-33 fent 10mcg/ml 250ml	66647-2171-33	250 mL	12	2	Released to CAPS	10/02/2014 09:56	

Below this, another section for 'Order Number' (99-40827), 'TrackingID (formerly E222#)' (14XB08102), and 'Order Placed' (10/02/2014) is shown, along with a table for a single order:

Order Number/Product	Product #	Volume	Case Size	Cases Ordered Today	Status	Status Date	FedEx Tracking
2041-94 morph 5mg/ml 50ml SY	66647-2041-94	50 mL	15	1	Released to CAPS	10/02/2014 09:41	

3. When the Express222 web page opens click on the 'Sent Orders' tab. Find the order you would like to receive from the list and click the green checkbox to the left of the order.

This screenshot shows the 'Express222 Orders' interface. At the top, there's a header with the CAPS logo and two small photographs. Below the header, the title 'Express222 Orders' is displayed. A legend at the top right includes 'View', 'Edit', 'Copy', 'Archive', 'Receive' (which has a checked checkbox), and 'Delete'. The tabs at the bottom are 'Open Orders' (selected), 'Sent Orders' (highlighted with a red circle and a red arrow), and 'Archived Orders'. The main area displays a list of orders with checkboxes:

	Date Sent	Tracking id
<input checked="" type="checkbox"/>	10/02/2014 13:14:56 (sent)	Tracking id:14XB08102
<input checked="" type="checkbox"/>	10/02/2014 12:58:56 (sent)	Tracking id:14XB08101
<input checked="" type="checkbox"/>	10/02/2014 12:32:52 (sent)	Tracking id:14XB08100

- When the Receiving Status window opens enter the amount of product you received in the 'Received Qty' field. Then click the 'Receive' button.

**Receiving Status for e222 Form# 14XB08102**

Products ordered From: Central Admixture Pharmacy Services - CA Date: 10-02-2014

Order Qty: 15.0000 Product: 66647-2041-94 Morphine 5 mg/mL in NS 50 mL SY(60ml)  
15.0000 shipped on 2014-10-02 (NDC: 66647204194)

RECEIVED QTY	RECEIVED DATE
15	2014-10-03

[receive](#)

[Commit pending changes](#) [Back to Order List](#)

- A red 'X' will appear to the left of the order indicating the order has been received.

**Receiving Status for e222 Form# 14XB08102**

Products ordered From: Central Admixture Pharmacy Services - CA Date: 10-02-2014

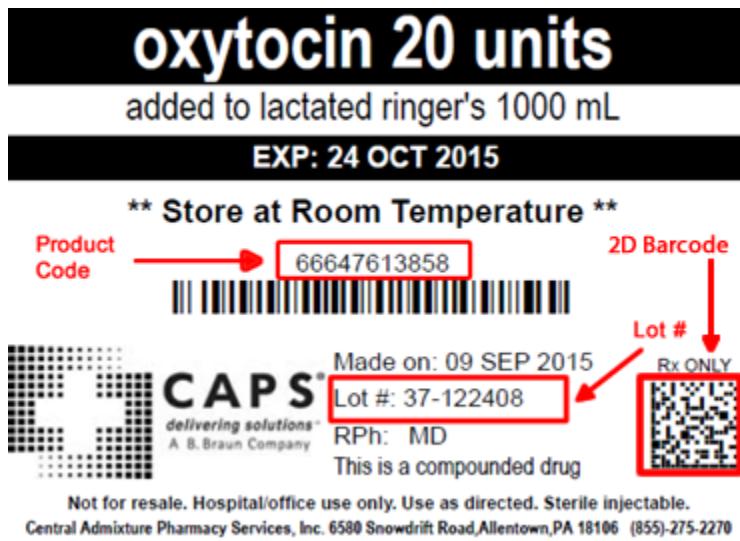
Order Qty: 15.0000 Product: 66647-2041-94 Morphine 5 mg/mL in NS 50 mL SY(60ml)  
15.0000 shipped on 2014-10-02 (NDC: 66647204194)

RECEIVED QTY	RECEIVED DATE
<input checked="" type="checkbox"/> 15.0000	2014-10-03

[Commit pending changes](#) [Back to Order List](#)

## 12. Retrieving a Certificate of Release

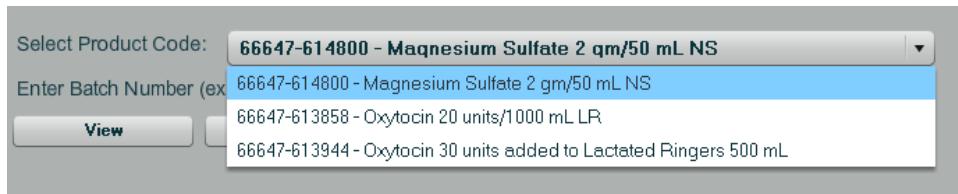
- Find the lot number and product code in the footer of the CAPS product label.



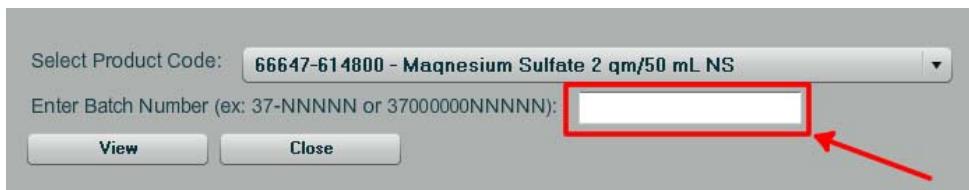
- 2) From the main screen in CAPSLink click on the 'Certificate of Release' link in the left hand navigation pane (in the Reports section).



- 3) In the 'Select Product Code' dropdown, select the product.



- 4) The batch number (Lot #) can either be entered manually following the format indicated (e.g. 37-NNNNNN) or scan the 2D barcode from the product label or box label into the Batch Number field.



- 5) Click the 'View' button to view/print the C of R.

## Notes

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