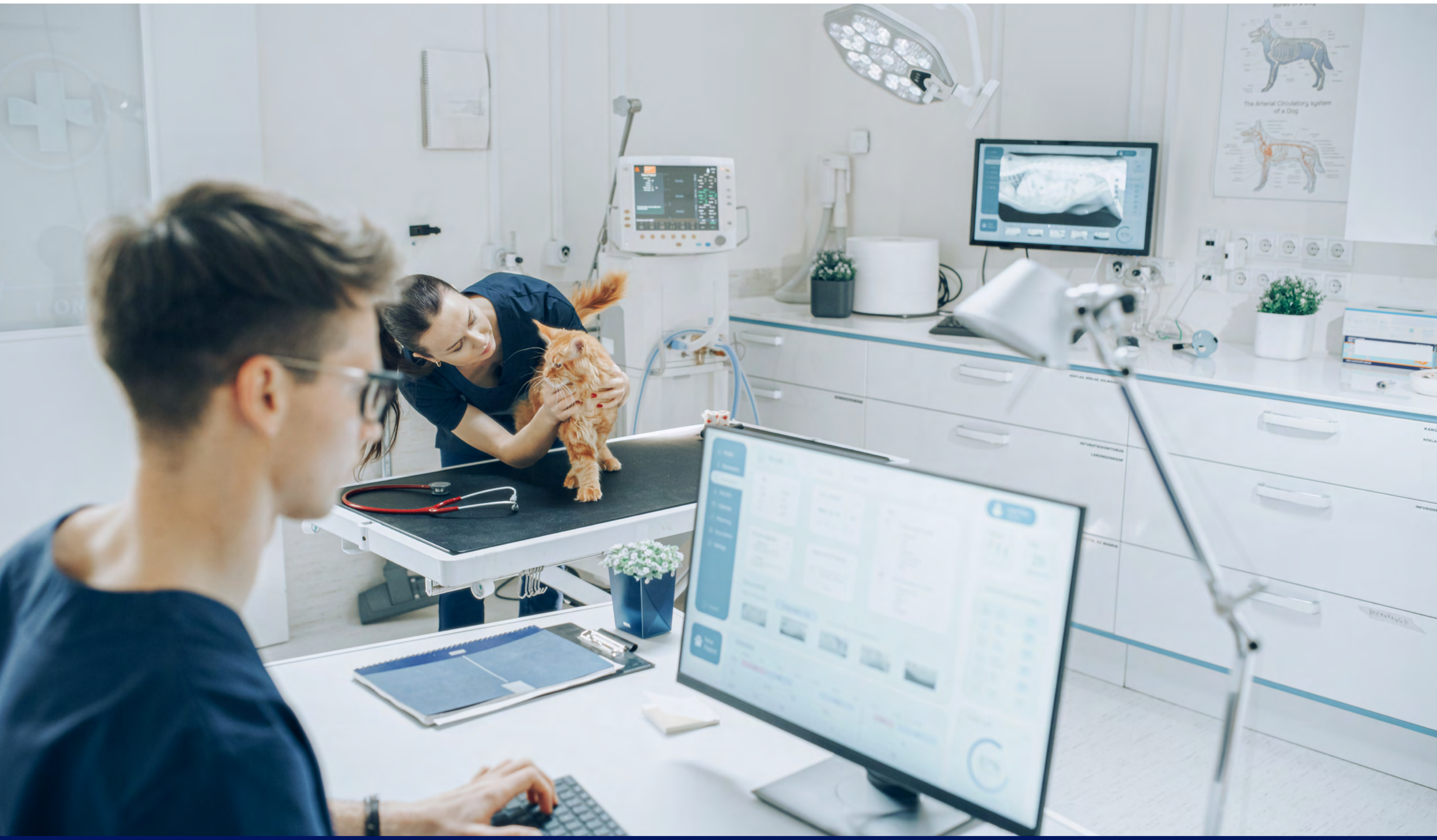
Cubex®

User Guide



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Introduction

Inventory management is one of the most important and time consuming pieces of any veterinary business. Counting and dispensing inventory may also be the most common area that allows for human errors. Cubex may be one solution to help veterinary businesses with this problem. The Cubex inventory management solutions are designed to control the cost of supplies and support staff with automated inventory tracking.

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

Covetrus® provides support for Impromed and Impromed Equine (hereinafter referred to as "PIMS") practice information management systems with the Cubex integration.

To fully use the integration properly, the following steps briefly explain the process.

1. Check the patient into the PIMS.
2. The patient/profile information is sent to myCubex system.
3. Use the myCubex system to select the medication to dispense.

Meanwhile within myCubex, it maintains your inventory levels and when necessary, sends purchase orders to the designated distributor. Then when the medication is received, the Cubex cabinet is refilled.

Please review **Setting up Cubex and Software Integration** and **Using Patient Interface with Cubex** for more detailed information on this configuration and steps on using it.

Cubex and Software Integration Requirements

For the Cubex integration to work successfully, your business must have the following:

- ✓ The latest version of the Cubex Service Manager.
- ✓ The latest Impromed Software license file.
- ✓ The latest Impromed Software version (depending on desired functionality).
- ✓ The Cubex Cabinet and MyCubex site account information.

Setting up Cubex and Software Integration

The Cubex integration requires a service to be configured and run while the cabinet and PIMS communicate.

Software

Get Latest License

Make sure that Cubex has been notified of this integration. If Cubex hasn't requested this integration, we will not be able to continue as information will be missing.

From the Ribbon:

1. Click **Help** > **Check for Updates**.
2. Click **Get Latest License**.
3. When finished, click **OK**.

If you do not have an active Internet connection, the above steps will not complete successfully.

Employees

PIMS and Cubex share employee names, IDs, and groups, so make sure that all employees who use the Cubex system are created in your PIMS and sorted into their respective group correctly.

For example, Dr. John Smith should be created within the Doctors group and have an ID of 05 assigned to him.

Configure the PIMS with Cubex

Before performing the following steps, Impromed recommends you have your inventory items setup and linked to the desired products.

Without the correct Cubex site ID, user name and password entered under Inventory Options, the integration with Cubex will not work.

1. Click **Ribbon > Business > Inventory > Inventory Options**.
2. Click the **Cubex** tab.
3. Enter the **Cubex Site ID** for each business.
4. Enter the corresponding **User Name** and **Password** for the Cubex site.
5. Double-click the **Cabinet ID** column for the appropriate business and storage location.
6. Double-click in the Cabinet ID List and enter the IDs. Click **Add Row** if there are more than one for a storage location. Click **Delete Row** if a row needs to be removed.
7. Click **OK** when finished entering Cabinet IDs.
8. Choose the method of Cubex Department Codes from either Profit Centers or Businesses. The PIMS automatically assigns a Cubex Department ID to either the Profit Center or Business.

Impromed recommends choosing the Profit Center for the Cubex Department Codes so financial reports are reflected correctly.

9. Click **Apply** to save the changes.
10. Click **Export List Data for the Cubex Site** when all steps are completed. This compiles a file of inventory items, employees, and department codes.

It is recommended that all inventory items have a unit of measure value entered as that does get exported to the Cubex system.

11. Choose the directory to save the files that are needed to finish the Cubex configuration. The PIMS generates three files for all of the data exported: Departments, Employees, and Inventory Items. The PIMS automatically names the files and adds _DEPARTMENTS, _EMPLOYEES, AND _INVENTORY to the end of each file name.
12. Click **Save**.
13. Click **OK** to close the Inventory Options window.

Some configuration is needed on the myCubex site and the files from Step 11 should be emailed to the Cubex Representative who requested the setup.

Cubex may request to wait for the rest of the configuration to be completed until the client is ready.

Cubex Service Manager

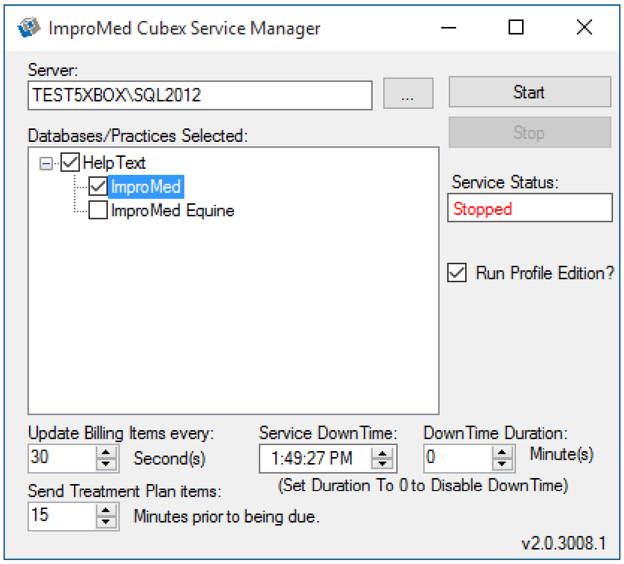
From the primary database server, log in as **Administrator** and perform the following installation and configuration steps:

Installation

1. Click **Start > Run** or **Start > Start Search**.
2. Type \\pdc1 (***Note*:** *This is an Impromed standard naming convention. Server names may vary*).
3. Press **Enter**.
4. Double-click **Program DVD**.
5. Double-click on the program's **version** folder.
6. Double-click **Integrations**.
7. Double-click **Cubex**.
8. Double-click **setup.exe**.
9. Click **Next >** select **I accept the terms in the License Agreement > Next > Next > Install > Finish**.

Configuration

1. Click **Start > [All] Programs > Impromed Cubex Service > Impromed Cubex Service Manager**. The following screen appears:



2. Enter the PIMS **database server** and **instance**.
3. Click ... .
4. Select the **Database** and **Practices**.
5. Set the following options:
    a. **Update Billing Items every** – Connects to myCubex to collect any available items or changes that have been made or completed.
    b. **Send Treatment Plan Items** – Connects to myCubex to send any available Treatment Plan items due within the set amount of time.
    c. **Run Profile Edition** – Select this option to activate the new Profile Integration (Using Profile Interface with Cubex).
6. Once all of these prompts have been set, the **Start** button may be pressed.

Once the program is closed you can reopen by repeating step 1.

Clicking the Stop button will stop execution of the service.

If the Stop button was clicked and the program is currently in the middle of a retrieval, the Service Status will state 'Stop Pending' until the retrieval has been completed.

Using Patient Interface with Cubex

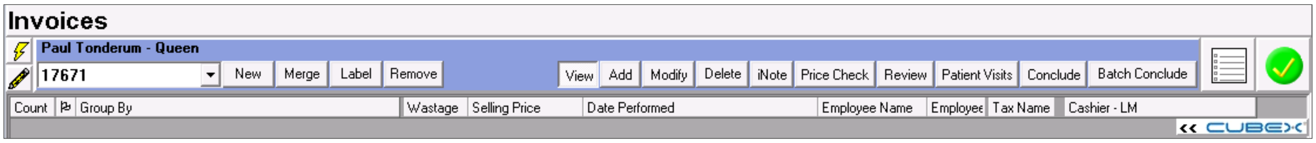
Patient Check-In Automation

For full automation of this integration:

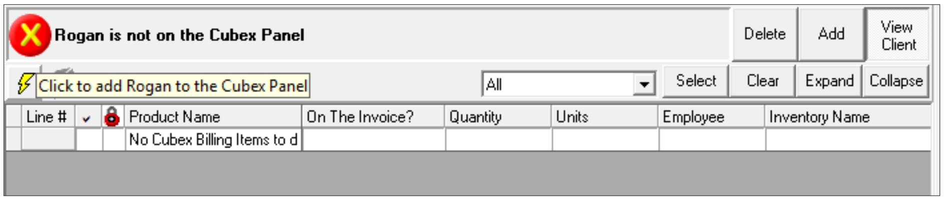
1. Set Census Check-In Status Type to Checked-In in Scheduler Options.
    a. Click **Scheduling > Scheduler > Scheduler Options**. The Scheduler Options dialog box opens.
    b. Choose the Status Types for **Census Check-In Status Type** to **Checked-In**.
    c. Click **OK** to save the option settings and close the setup dialog box.
2. Set both (Appointments and Reservations if both have been purchased) Check In Options to Automatically move the patient into the default check-in location in Clinic Census Options.
    a. Click **Scheduling > Clinic Census > Clinic Census Options.**
    b. Select a Check-In Option. When a patient is checked into an appointment or reservation, the program can be set to move the patient to the default location, prompt for a location, or do nothing. Once an action is selected, then select where to move the patient when the action is completed by an operator.
    c. Click **OK** to save the changes and close the dialog box.

Patient Check-In Manually

1. Search for the patient.
2. Click on **Ribbon > Invoicing > Invoices**. The Invoicing module opens.



3. Click CUBEX. This expands the Cubex integration screen.
4. Click [Patient Name] is not on the Cubex Panel. This changes the icon from ❌ to ✅.



The PIMS automatically sends patients to the Cubex Panel if they have products on an open invoice every three minutes.

5. Continue **"Using Profile Interface with Cubex"** or **"Appendix" on page 12**.

Using Profile Interface with Cubex

This feature is available with Impromed/Impromed Equine v6.0 and higher and Infinity v5.1sr8/ Triple Crown v3.0sr8 or higher.

The Profile Interface is a new addition to the Cubex Integration. Each profile is comprised of the patient information and billing items (which include invoice and treatment plan items). The Profile Interface allows operators to begin invoicing or adding items to a patient's treatment plan after they are checked in. Then the PIMS sends the profile to myCubex for use on the panel. Once the profile is opened on the panel, the items can be dispensed, modified, and sent back to the PIMS.

Using the Profile Interface should help alleviate operators from:

- ✓ Entering billable items into both the PIMS and Cubex.
- ✓ Having to verify items from myCubex are entered correctly into the PIMS.

Before beginning, we need to know where the operator is starting from. Since billable items can be added from either Invoicing or Treatment Plans, we need to start from one of those two modules.

From either the Invoicing or Treatment Plans modules:

1. Add the items to the invoice or treatment plan.
2. The profile is then sent to myCubex.
3. Using the Cubex panel, dispense all inventory items needed.
4. (*Optional*) Make adjustments if needed.

   Follow **"Appendix" on page 12** to verify the adjustments are valid.
5. For Treatment Plan items, complete the item from the PIMS.
6. When the patient is ready to be discharged, conclude the invoice from the PIMS.

Contacting Customer Support

Impromed

If you need assistance with the Impromed Cubex Service, the Impromed Practice Management Software, or if you need general assistance about any of the information above, please call the Impromed Customer Support Center at 877-999-2838.

Cubex

If you need assistance with the Cubex Cabinet or Cubex Software, please call 866-930-9251 or email interfaces@cubexsystem.com.

Appendix

Using Billing Items with Cubex

From the Ribbon:

1. Click **Invoicing > Invoices**. The Invoicing module opens.
2. Search for the patient.
3. Click . This expands the Cubex integration screen.
4. Expand the patient (click the +) .
5. Select the Cubex Billing Items to add to the invoice.

Toggling between View All and View Client allows operators to either see Billing Items for the active client/ patient or for all client/patients who have billing items with Cubex.

6. Select items with ease using the Selection drop-down to the left of Select:
   a. **All** - selects all items listed.
   b. **Client** - selects all items listed for the active client.
   c. **Patient** - selects all items listed for the active patient.
   d. **Already on the Invoice** - selects all items that have the product listed on the current invoice.

If you have already built your invoice and want to verify the items are all accounted for, select all items already on the invoice and clear them.

7. Within the **On The Invoice?** column, operators will see or choose from these options:
   a. **No** – means the items sent from the Cubex Cabinet is not on the current invoice for the patient.
   b. **Yes** – “Do not add it again” means the item exists on the invoice and you do not want to add it again.
   c. **Yes** – “Add item again” means the item exists on the invoice, but you DO want to add it to the invoice again. This duplicates the item on the invoice and processes the product just like it was added the first time.
8. Select an **Employee**.
9. Click **Add** to move the items to an open invoice. The Move Products window appears.

A warning may appear if items are not linked.

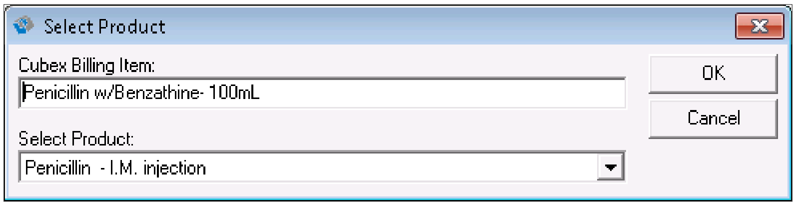
10. Click **OK** after verify the items and information are all correct.
11. Continue adding items to the invoice or conclude the invoice.

Linking Cubex Billing Items to Software Products

Because Cubex and Impromed have shared a list of inventory items (done during the Configuration phase), most items should be linked. The only time linking may need to occur is when there are multiple products linked to one inventory item.

With the Cubex panel open within the Invoicing Module:

1. Click **Expand** to expand all patients or click the + in front of the desired patient to expand.
2. Double-click on Linked to more than one Invoice Product. The Select Product window appears.



3. Select the desired product using the Select Product drop-down. This drop-down only displays products that are linked to the inventory item.
4. Click **OK** when finished.
5. Repeat for all Cubex Billing Items that need to be linked.