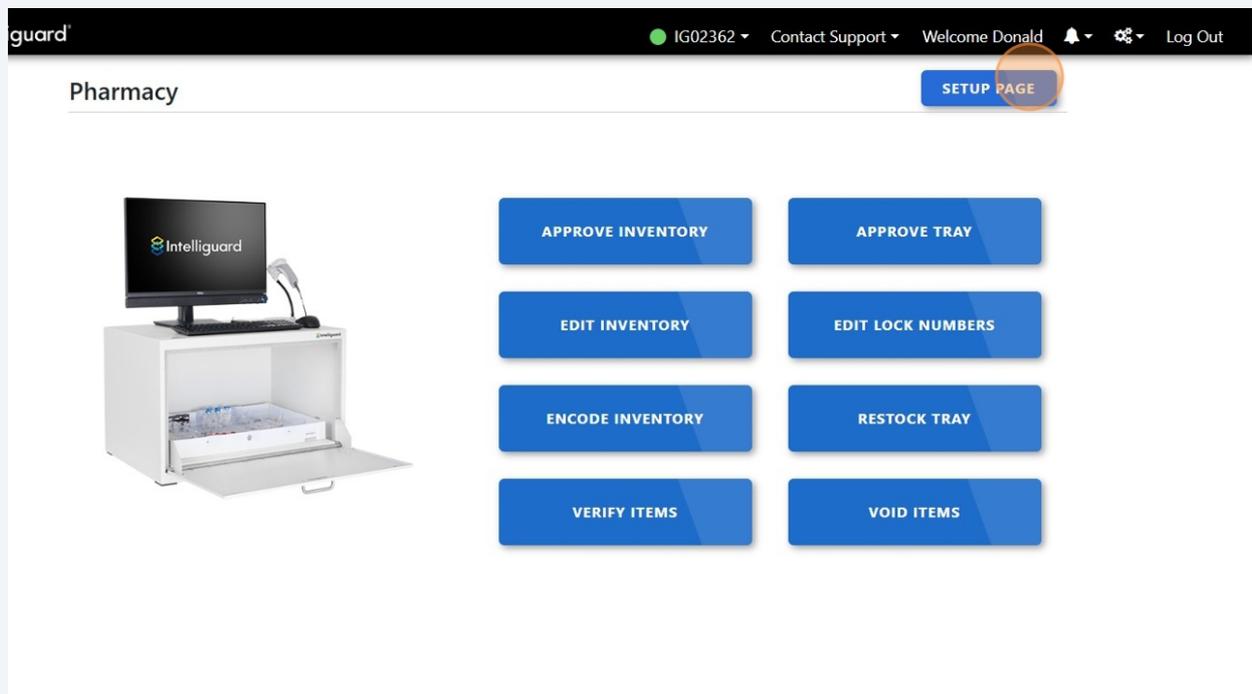


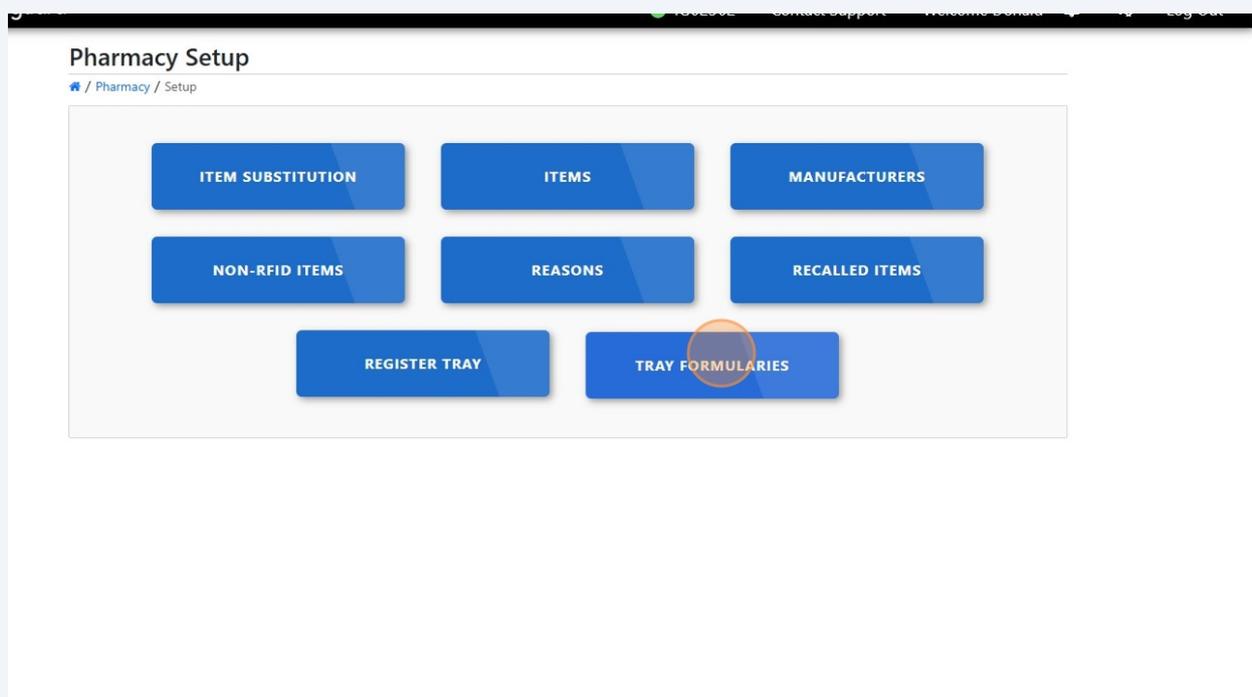
How to Create a Tray Formulary

1 Click "Setup Page"



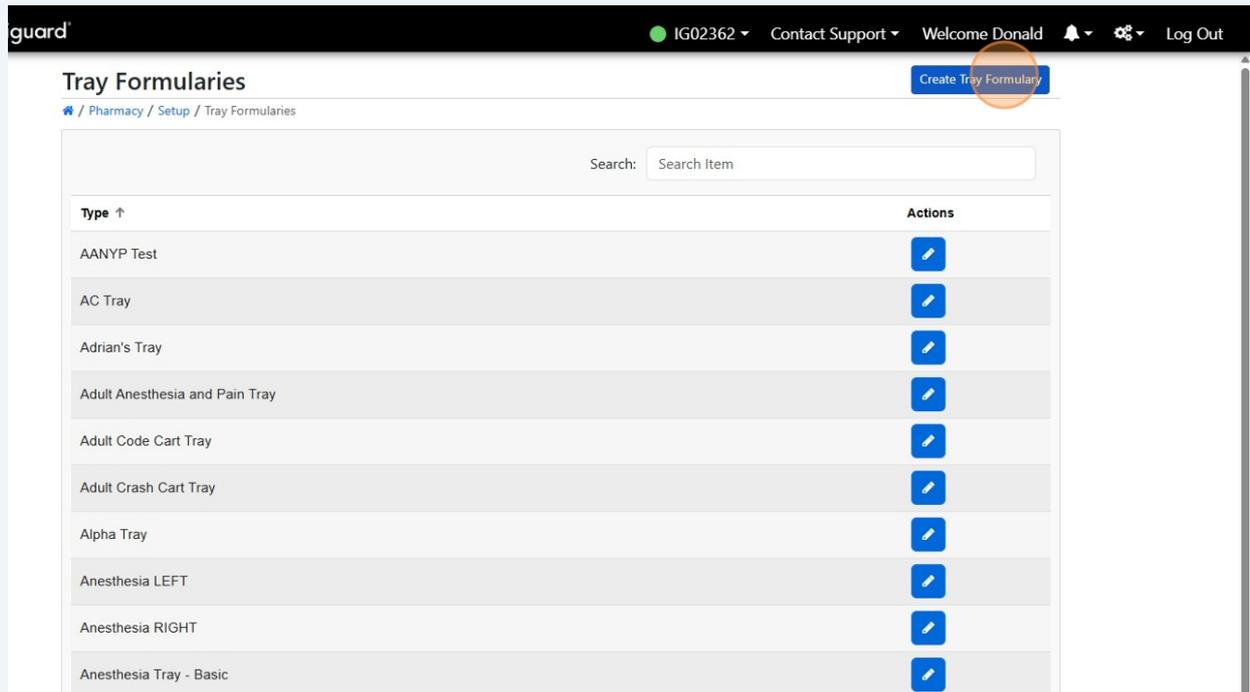
The screenshot shows the Intelliguard Pharmacy Setup Page. The top navigation bar includes the 'guard' logo, user ID 'IG02362', 'Contact Support', 'Welcome Donald', and 'Log Out'. The page title is 'Pharmacy'. A blue button labeled 'SETUP PAGE' is circled in orange. Below the title is a grid of eight blue buttons: 'APPROVE INVENTORY', 'APPROVE TRAY', 'EDIT INVENTORY', 'EDIT LOCK NUMBERS', 'ENCODE INVENTORY', 'RESTOCK TRAY', 'VERIFY ITEMS', and 'VOID ITEMS'. To the left of the buttons is an image of a computer monitor displaying the Intelliguard logo on a white cabinet.

2 Click "Tray Formularies"



The screenshot shows the Intelliguard Pharmacy Setup - Tray Formularies Page. The top navigation bar includes the 'guard' logo, user ID 'IG02362', 'Contact Support', 'Welcome Donald', and 'Log Out'. The page title is 'Pharmacy Setup'. Below the title is a breadcrumb trail: 'Pharmacy / Setup'. A grid of seven blue buttons is displayed: 'ITEM SUBSTITUTION', 'ITEMS', 'MANUFACTURERS', 'NON-RFID ITEMS', 'REASONS', 'RECALLED ITEMS', and 'TRAY FORMULARIES'. The 'TRAY FORMULARIES' button is circled in orange. Below the buttons is a blue button labeled 'REGISTER TRAY'.

3 Click "Create Tray Formulary"



guard IG02362 Contact Support Welcome Donald Log Out

Tray Formularies

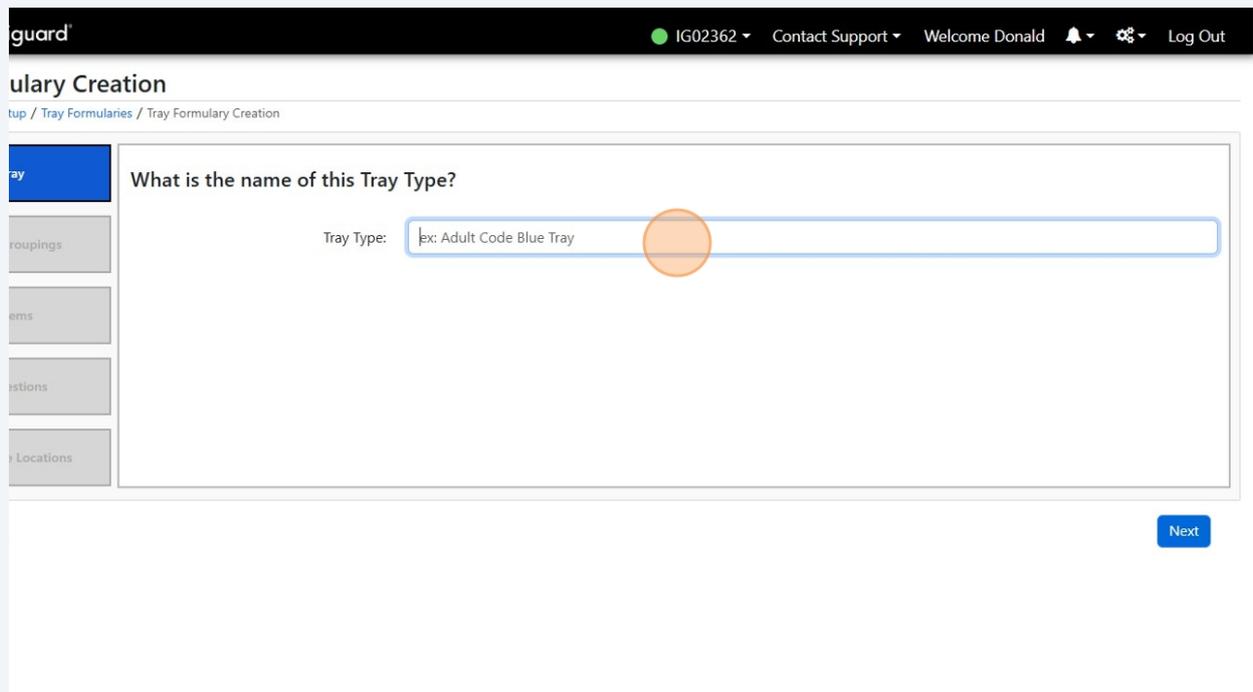
Pharmacy / Setup / Tray Formularies

Search: Search Item

Type ↑	Actions
AANYP Test	
AC Tray	
Adrian's Tray	
Adult Anesthesia and Pain Tray	
Adult Code Cart Tray	
Adult Crash Cart Tray	
Alpha Tray	
Anesthesia LEFT	
Anesthesia RIGHT	
Anesthesia Tray - Basic	

Create Tray Formulary

4 Click the "Tray Type:" field and enter the name of the new tray.



guard IG02362 Contact Support Welcome Donald Log Out

Tray Formulary Creation

Pharmacy / Setup / Tray Formularies / Tray Formulary Creation

Tray

Groupings

Items

Locations

Questions

What is the name of this Tray Type?

Tray Type:

Next

5 Click "Next"

Setup / Tray Formularies / Tray Formulary Creation

What is the name of this Tray Type?

Tray Type:

Next

Intelliguard

6 Click and drag the item groupings that you want to use in this tray to the right side.

Intelliguard IG02362 Contact Support Welcome Donald

Tray Formulary Creation

Pharmacy / Setup / Tray Formularies / Tray Formulary Creation

1 Name of Tray

2 Included Groupings

3 Included Items

4 Config Questions

5 Deployable Locations

What are the AAA Tray Item Groupings?

Drag an item from the Available Item Groupings list to the Selected Item Groupings list. Drag Selected Item Groupings up or down in the list to adjust

Available Item Groupings:	Selected Item Groupings:
Narcotics	Medications
Narcotics Waste	
Supplies	
OB-GYN	
Test Grouping	
Pediatric Anaphylaxis Kit - IM ONLY	
Jill's Group	

Add a New Item Grouping to the list:

7

To Add a new Grouping, Click the "Add a New Item Grouping to the list:" field. Enter in the name and then click "Add".

1 Name of Tray

2 Included Groupings

3 Included Items

4 Config Questions

5 Deployable Locations

What are the AAA Tray Item Groupings?

Drag an item from the Available Item Groupings list to the Selected Item Groupings list. Drag Selected Item Groupings up or down in the list to adjust

Available Item Groupings:

- Narcotics
- Narcotics Waste
- OB-GYN
- Test Grouping
- Pediatric Anaphylaxis Kit - IM ONLY
- Jill's Group

Selected Item Groupings:

- Medications
- Supplies

Add a New Item Grouping to the list:

Add

Previous

© Copyright 2025 Intelliguard

8

After all the Groupings have been selected, Click "Next".

ay

roupings

ems

estions

Locations

What are the AAA Tray Item Groupings?

Drag an item from the Available Item Groupings list to the Selected Item Groupings list. Drag Selected Item Groupings up or down in the list to adjust order.

Available Item Groupings:

- Narcotics
- Narcotics Waste
- OB-GYN
- Test Grouping
- Pediatric Anaphylaxis Kit - IM ONLY
- Jill's Group

Selected Item Groupings:

- Medications
- Supplies

Add a New Item Grouping to the list:

Add

Next

Intelliguard

9 Click and drag items from the left, to under the groupings on the right side.

- 1 Name of Tray
- 2 Included Groupings
- 3 Included Items
- 4 Config Questions
- 5 Deployable Locations

What items belong in AAA Tray?

Drag from the **Available Items*** or **Non-RFID Items** list and drop into the **Item Groupings and Selected Items** list. Drag **Selected Items** up or down in the list to adjust order. Then, **adjust the PAR levels** for each item as necessary to continue.

Available Items:

- 1 ML etanercept 50 MG/ML Prefilled Syringe
- 24HR viloxazine 150 MG Extended Release Oral Capsule
- 24HR viloxazine 200 MG Extended Release Oral Capsule
- abacavir 20 MG in 1 mL Oral Solution
- abacavir 300 MG Oral Tablet
- abacavir 600 MG / dolutegravir 50 MG / lamivudine 300 MG Oral Tablet
- abacavir sulfate 600 MG / lamivudine 300 MG Oral Tablet

Non-RFID Items:

- Diapers
- Mini Transfer Device
- Post Note

Item Groupings and Selected Items:

Medications

Name	Min PAR	Max PAR	Type

Supplies

Name	Min PAR	Max PAR	Type

* If an item is currently configured as a substitute on this tray formulary, it does not appear on the list of **Available Items**.

Previous

© Copyright 2025 Intelliguard

10 Select PAR levels once the item is dropped under the groupings.

Tray / Tray Formularies / Tray Formulary Creation

- Tray
- Groupings
- Items
- Questions
- Locations

What items belong in AAA Tray?

Drag from the **Available Items*** or **Non-RFID Items** list and drop into the **Item Groupings and Selected Items** list. Drag **Selected Items** up or down in the list to adjust order. Then, **adjust the PAR levels** for each item as necessary to continue.

Available Items:

- 1 ML etanercept 50 MG/ML Prefilled Syringe
- 24HR viloxazine 150 MG Extended Release Oral Capsule
- 24HR viloxazine 200 MG Extended Release Oral Capsule
- abacavir 20 MG in 1 mL Oral Solution
- abacavir 300 MG Oral Tablet
- abacavir 600 MG / dolutegravir 50 MG / lamivudine 300 MG Oral Tablet
- abacavir sulfate 600 MG / lamivudine 300 MG Oral Tablet

Non-RFID Items:

- Dealmed Sterile Gauze Pad 4" x 4", Disposable
- Diapers
- Mini Transfer Device

Item Groupings and Selected Items:

Medications

Name	Min PAR	Max PAR	Type

Supplies

Name	Min PAR	Max PAR	Type
Post Note	0	0	🗑️

* If an item is currently configured as a substitute on this tray formulary, it does not appear on the list of **Available Items**.

Next

11 Click "Next"

What items belong in AAA tray:

Drag from the **Available Items*** or **Non-RFID Items** list and drop into the **Item Groupings and Selected Items** list. Drag **Selected Items** up or down in the list to adjust order. Then, **adjust the PAR levels** for each item as necessary to continue.

Available Items:

- Acetaminophen 120mg Suppository
- acetaminophen 160 MG / chlorpheniramine maleate 1 MG / dextromethorphan HBr 5 MG / phenylephrine HCl 2.5 MG in 5 mL Oral Suspension
- acetaminophen 160 MG Chewable Tablet
- Acetaminophen 160 MG Oral Powder
- Acetaminophen 325mg Suppository
- Acetaminophen 32mg/mL 10.15mL Oral Soln

Non-RFID Items:

- Dealmed Sterile Gauze Pad 4" x 4", Disposable
- Diapers
- Mini Transfer Device

* If an item is currently configured as a substitute on this tray formulary, it does not appear on the list of **Available Items**.

Item Groupings and Selected Items:

Medications

Name	Min PAR	Max PAR	Type	
acetaminophen 160 MG / chlorpheniramine maleate 1 MG / dextromethorphan HBr 5 MG / phenylephrine HCl 2.5 MG in 5 mL Oral Suspension	2	2	Solution	

Supplies

Name	Min PAR	Max PAR	Type	
Post Note	1	1		

Intelliguard

12 Fill in the Configuration questions for the new tray.

Intelliguard IG02362 Contact Support Welcome Donald

Tray Formulary Creation

Pharmacy / Setup / Tray Formularies / Tray Formulary Creation

1 Name of Tray

2 Included Groupings

3 Included Items

4 Config Questions

5 Deployable Locations

Configuration Questions: AAA Tray

- In trays of this type, items expiring within days should be replaced.*
- Is this tray stored under constant refrigeration? Yes No
- How many lock numbers are recorded for each completed tray?
- Display Post-Restock instructions?* Yes No
- Additional instructions to display on Tray Detail report:
- Will this tray be deployed with Logbook?* Yes No

13

Be sure to choose if your tray will be deployed through Logbook.

Pharmacy / Setup / Tray Formuaires / Tray Formulary Creation

1 Name of Tray

2 Included Groupings

3 Included Items

4 Config Questions

5 Deployable Locations

Configuration Questions: AAA Tray

1) In trays of this type, items expiring within days should be replaced.*

2) Is this tray stored under constant refrigeration?* Yes No

3) How many lock numbers are recorded for each completed tray?

4) Display Post-Restock instructions?* Yes No

5) Additional instructions to display on Tray Detail report:

6) Will this tray be deployed with Logbook?* Yes No

[Previous](#)

© Copyright 2025 Intelliguard

14

Click "Next"

Pharmacy / Setup / Tray Formuaires / Tray Formulary Creation

ay

roupings

ems

estions

Locations

Configuration Questions: AAA Tray

* Required

1) In trays of this type, items expiring within days should be replaced.*

2) Is this tray stored under constant refrigeration?* Yes No

3) How many lock numbers are recorded for each completed tray?

4) Display Post-Restock instructions?* Yes No

5) Additional instructions to display on Tray Detail report:

6) Will this tray be deployed with Logbook?* Yes No

[Next](#)

Intelliguard

15

Check the box next to the locations where you want to allow the tray to be deployed to.

Tray Locations for AAA Tray * Required

Select the locations to which trays of this type can be deployed, and select a Default Location:

Locations:	Default Location (select one):*
OR 8 <input type="checkbox"/>	
OR 9 <input type="checkbox"/>	
PACU <input type="checkbox"/>	
PACU B <input type="checkbox"/>	
Pharmacy <input checked="" type="checkbox"/>	
RAD 1 <input type="checkbox"/>	
RAD 4 <input type="checkbox"/>	
Spare Crash Cart Room <input type="checkbox"/>	

Previous Save

16

Click this checkbox.

Tray Locations for AAA Tray * Required

Select the locations to which trays of this type can be deployed, and select a Default Location:

Locations:	Default Location (select one):*
3M <input checked="" type="checkbox"/>	3M <input type="checkbox"/>
5 North <input checked="" type="checkbox"/>	5 North <input type="checkbox"/>
6 North <input checked="" type="checkbox"/>	6 North <input type="checkbox"/>
6 West <input checked="" type="checkbox"/>	6 West <input type="checkbox"/>
Cardiac Cath Lab <input type="checkbox"/>	Pharmacy <input checked="" type="checkbox"/>
CATH LAB <input type="checkbox"/>	
Central Supply <input type="checkbox"/>	
CT 1 (new) <input type="checkbox"/>	

Save

17

Check the box next to the default location for the tray. This will be the "home" location and is usually the pharmacy.

Tray / Tray Formularies / Tray Formulary Creation

Tray Locations for AAA Tray * Required

Select the locations to which trays of this type can be deployed, and select a Default Location:

Locations:	Default Location (select one):*
3M <input checked="" type="checkbox"/>	3M <input type="checkbox"/>
5 North <input checked="" type="checkbox"/>	5 North <input type="checkbox"/>
6 North <input checked="" type="checkbox"/>	6 North <input type="checkbox"/>
6 West <input checked="" type="checkbox"/>	6 West <input type="checkbox"/>
Cardiac Cath Lab <input type="checkbox"/>	Pharmacy <input checked="" type="checkbox"/>
CATH LAB <input type="checkbox"/>	
Central Supply <input type="checkbox"/>	
CT 1 (new) <input type="checkbox"/>	

[Save](#)

18

Click "Save"

Tray / Tray Formularies / Tray Formulary Creation

Tray Locations for AAA Tray * Required

Select the locations to which trays of this type can be deployed, and select a Default Location:

Locations:	Default Location (select one):*
3M <input checked="" type="checkbox"/>	3M <input type="checkbox"/>
5 North <input checked="" type="checkbox"/>	5 North <input type="checkbox"/>
6 North <input checked="" type="checkbox"/>	6 North <input type="checkbox"/>
6 West <input checked="" type="checkbox"/>	6 West <input type="checkbox"/>
Cardiac Cath Lab <input type="checkbox"/>	Pharmacy <input checked="" type="checkbox"/>
CATH LAB <input type="checkbox"/>	
Central Supply <input type="checkbox"/>	
CT 1 (new) <input type="checkbox"/>	

[Save](#)

elliguard

How to Edit a Tray Formulary

- 1 Click the "Edit" button under Actions, next to the tray you want to edit.

The screenshot shows the 'guard' interface with a navigation bar at the top containing 'IG02362', 'Contact Support', and 'Welcome'. A green notification banner at the top right says 'Tray Formulary Saved.' Below the navigation bar is the 'Tray Formularies' section with a 'Create Tray Formulary' button. A search bar labeled 'Search: Search Item' is present. A table lists various trays, and the 'Actions' column for each tray contains a blue edit icon. The edit icon for the 'AAA Tray' is highlighted with an orange circle.

Type ↑	Actions
AAA Tray	
AANYP Test	
AC Tray	
Adrian's Tray	
Adult Anesthesia and Pain Tray	
Adult Code Cart Tray	
Adult Crash Cart Tray	
Alpha Tray	
Anesthesia LEFT	
Anesthesia RIGHT	

- 2 Click "Next" to navigate through the configuration questions and edit what you want, then click "Save".

The screenshot shows the 'Intelliguard' interface for 'Tray Formulary Creation' at 'Rady Children's Hospital'. The page has a navigation bar with 'Select an Enclosure', 'Contact Support', 'Welcome Sally', and 'Log Out'. A sidebar on the left shows a progress indicator with five steps: '1 Name of Tray', '2 Included Groupings', '3 Included Items', '4 Config Questions', and '5 Deployable Locations'. The main content area is titled 'What are the 2024.5 Durable cache Item Groupings?' and includes instructions to drag items from the 'Available Item Groupings' list to the 'Selected Item Groupings' list. The 'Available Item Groupings' list contains: Instructions, Narcotics, Narcotics Waste, Supplies, 123, Medications, and Test Tray 444. The 'Selected Item Groupings' list currently contains 'Test Med'. A blue bar highlights the 'Test Med' item in the selected list, and an orange circle highlights the drag handle. At the bottom, there is an 'Add' button for a new item grouping and 'Previous' and 'Next' navigation buttons. The footer contains '© Copyright 2025 Intelliguard'.