CONTROLTEX® LBS® TRAINING GUIDE
DISTRIBUTION POINT and STANDARDS MASTER

This training guide describes the key components and functions of the Next Generation ControlTex LBS Distribution Point Master and Standards Master. The purpose of the Distribution Point Master is to create and manage areas within a facility to order/ship linen from the laundry and/or manage linen distribution within the facility. The Standards Master establishes the linen items and standard for each item on each cart. These standards may also be used as the linen order quantity.

Summary of What's New:

- The Distribution Point Master Table is now displayed in two different views. The Area Level View contains the Area Level setup information for each Area. The Cart Level View displays the cart setup information for each cart from all the Areas. The Cart Level View provides the opportunity to sort, filter and manage cart schedules across all the Areas within a facility on one screen.

- Delivery Time has been added for each Cart to support managing delivery schedules and on-time delivery performance. The time will display on all Orders created.

- Schedule Repeat has been added to allow for more schedule options that repeat less frequently than weekly.

- Start Date has been added to determine when to start or activate each cart's delivery schedule and repeat frequency.

- The Cart Delivery/Usage schedule days have been separated by day to allow for more options to sort/view in the Cart Level View table.

- Adding a new cart will now default to green D's on each day.

- The Standards Master had been updated to add a check box at the top of every cart. The check box allows the user to check or uncheck all the items in that cart.

- Built By has been changed to Order Type. The Laundry Order Type and Facility Order Type function as before. A new Order Type has been added called No Order. When No Order is selected for Order Type the Order Group will automatically update to ZZ-No Order. No Order is the default order type.

- A new default Order Group has been established. ZZ-No Order is the default order group that will appear every time a new area/cart is created. The ZZ-No Order Group allows hospitals to add area/carts for the purpose of internal distribution and not affect the laundry linen orders. The Areas/Carts with ZZ-No Order will not be available for creating orders.

  - Recommended action: Update the order type used for internal distribution area/carts with the No Order. Upon making this change the order type should show ZZ-No Order Group

- A new field called Access has been added for each Area. Area Access allows the Laundry to give a hospital user access to view their distribution point master schedule for orders

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and the standing order items/quantities in the Standards Master. In addition, the Area access allows the laundry to give a hospital user the ability to create and manage areas for distribution within the facility without affecting the areas setup for ordering linen from the laundry.

- o Areas set to Facility Access can be viewed and edited by anyone with access to that facility and have been given Utilization Master Files privileges in their security master setup.

- o Areas set to Laundry Access can only be viewed by anyone with access to that facility and Utilization Master Files privileges in their security master setup. To edit areas set to Laundry Access will require the user to have access to the laundry facility.

The following tables show user requirements to perform functions for each access setting.

Distribution Point Master - Area Access	Required User Privileges		
Areas Set to Facility Access	**Utilization Master Files**	**Facility Access**	**Laundry Access**
View an Area and its associated Standard Master	X	X	
Edit the Area Fields Except Access	X	X	
Edit Access field	X	X	X
Edit number of carts, cart description, HH, Delivery Time, Schedule, Schedule Repeats, Starting Date	X	X	
Edit Cart Order Type, Order Group, Production Build Days Early and Route	X	X	X
Edit Standard Master	X	X	
Add New Area	X	X	
Discontinue Area	X	X	

Distribution Point Master - Area Access	Required User Privileges		
Areas Set to Laundry Access	**Utilization Master Files**	**Facility Access**	**Laundry Access**
View an Area and its associated Standard Master	X	X	
Edit the Area Fields Except Access	X	X	X
Edit Access field	X	X	X
Edit number of carts, cart description, HH, Delivery Time, Schedule, Schedule Repeats, Starting Date	X	X	X
Edit Cart Order Type, Order Group, Production Build Days Early and Route	X	X	X
Edit Standard Master	X	X	X
Add New Area	X	X	
Discontinue Area	X	X	X

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- Fields for Benchmark Area and KPI type have been added/updated to support the use of Area Level pounds per day benchmarking.

- The Activity and Arrange fields no longer appear on the Distribution Point Editor. The fields only appear on the Area Level View of the Distribution Point Table. Data/information in these fields can only be edited from the Distribution Point Area Level View.

TRAINING GUIDE TO USE THE DISTRIBUTION POINT MASTER

Distribution Point Master

The Distribution Point Master is used to create and manage areas within a facility to order linen from the laundry and/or manage linen distribution within the facility. Each facility must have at least one Distribution Point Area set up as a Laundry/Linen Room area type. The Distribution Point Master may be accessed from the Main Menu > Facilities > Distribution Points or by selecting the Distribution Point Master shortcut tile on the home screen.

The Distribution Point Master opens the Area Level View table. The Area Level View displays a list of all Areas set up in the facility and all the Area level fields for each Area. The list defaults to Active Areas with Discontinued Areas hidden. To see Discontinued Areas, uncheck the Hide Discontinued box. The discontinued areas will display with the active areas and will be highlighted in red.

Distribution Point Master

Area #	Area Name	Area Type	Distribution Method	# of Carts	Beds	Account #	Area Group	Variable	Activity	Arrange	Bench
100	Emergency Dept	Ancillary	Cart Exchange	5	0		Default	0	0	0	
105	2 North	Patient Care	Cart Exchange	4	0		Default	0	0	0	
110	Dr Smith Clinic	Patient Care	Closet	4	0		Default	0	0	0	
115	3 North	Patient Care	Cart Exchange	1	0		Default	0	0	0	
120	4 North	Patient Care	Cart Exchange	1	0		Default	0	0	0	
901	EVS Mops and Rags	Patient Care	Cart Exchange	9	0		Default	0	0	0	
999	LINEN ROOM	Laundry/Linen Room	Closet	6	0	5196-957	Default	0	0	0	

☑ Hide Discontinued   ⦿ Area Level View ◯ Cart Schedule View

➕ New   ❎ Exit

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- Note: A user with only facility access and who does not have laundry access will see black/darker print color for Areas set to Facility Access. The Areas with grey print color are set to Laundry Access

A second table called the Cart Level View may be selected. The Cart Level View will display the setup fields for each cart within an Area. Each column in both Area Level and Cart Level views can be filtered by clicking the top of the column. Filters on the bottom of each column allow the user to filter by several different sort options.

Most of the fields within both the Area Level and Cart Level views may be edited depending on the users' privileges and the area access.

Distribution Point Master

Area #	Area Name	Cart #	Cart Description	HH	Delivery Time	M	T	W	H	F	S	N	Schedule Repeats	Start W
100	Emergency Dept	1	ED Linen Cart	1	04:00 PM	D	D	D	D	D	D	D	Weekly	8/
100	Emergency Dept	2	ED Blankets	1	04:00 PM	D	D	D	D	D	D	D	Weekly	8/
100	Emergency Dept	3	ED Linen Cart -Triage	1	04:00 PM	D	D	D	D	D	D	D	Weekly	8/
100	Emergency Dept	4	ED Observation Unit	1	09:00 AM	D	D	D	D	D	D	D	Weekly	8/
100	Emergency Dept	5	Extras	1	10:00 PM	D	D	D	D	D	D	D	Weekly	8/
105	2 North	1	Exchange Cart	1	07:00 AM	D	D	D	D	D	D	D	Weekly	8/
105	2 North	2	2nd Shift Top Off and Extras	1	08:00 PM	D	D	D	D	D	D	D	Weekly	8/
105	2 North	3		1	12:00 AM	D	D	D	D	D	D	D	Weekly	11/
105	2 North	4		1	12:00 AM	D	D	D	D	D	D	D	Weekly	11,
110	Dr Smith Clinic	1	Linen Order	1	12:00 AM	O	O	D	O	O	O	C	2 Weeks	9/
110	Dr Smith Clinic	2	Scrub Order	1	12:00 AM	O	O	D	O	O	O	C	2 Weeks	9/
110	Dr Smith Clinic	3	Standing Order	1	12:00 AM	O	O	D	O	O	O	C	2 Weeks	9/
110	Dr Smith Clinic	4	Mops and Rags	1	09:00 AM	O	O	D	O	O	O	C	4 Weeks	9/
115	3 North	1		1	12:00 AM	D	D	D	D	D	D	D	Weekly	1/
120	4 North	1		1	12:00 AM	D	D	D	D	D	D	D	Weekly	1/
901	EVS Mops and Rags	1	Sheet Pounds Sling	1	12:00 AM	D	D	D	D	D	D	D	Weekly	8/
901	EVS Mops and Rags	2	Bath Blanket Pounds	1	12:00 AM	D	D	D	D	D	D	D	Weekly	9/
901	EVS Mops and Rags	3	Towel Pounds	1	12:00 AM	D	D	D	D	D	D	D	Weekly	9/
901	EVS Mops and Rags	4	Gown Pounds	1	12:00 AM	D	D	D	D	D	D	D	Weekly	9/
901	EVS Mops and Rags	5	Contour Sheet Pounds	1	12:00 AM	D	D	D	D	D	D	D	Weekly	9/

☑ Hide Discontinued   ○ Area Level View   ● Cart Schedule View

⊕ New   ☒ Exit

Area # is the primary identifier for each Area within a Facility. The Area number is created by the user and may be a number from 1 to 999. Once an Area Number is used it cannot be edited or changed. All other fields within an Area can be edited. Areas cannot be deleted. The status of an Area is either Active or Discontinued.

Creating a New Area

Select the + New button at the bottom of the screen. A list of all the created Areas is displayed. Enter a number from 1 to 999, in the box. If the number is already in use an error message will appear prompting the user to enter an alternate number. Click OK and the Distribution Point Editor will open to setup the remaining fields.

Create a New Distribution Point

Area	Description
100	Emergency Dept
105	2 North
110	Dr Smith Clinic
115	3 North
120	4 North
901	EVS Mops and Rags
999	LINEN ROOM

205   ⊘ OK   ☒ Cancel

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Distribution Point Editor ⓘ

205 -

Area #	Area Name	Area Type	Distribution Method	Variable %	Beds	Access
205		Patient Care	Cart Exchange	0	0	Facility

Carts	Account #	Group	Benchmark Area	KPI Target	Exchange Basis
0		Default	Other	0	Standard

Cart #	Cart/Closet Description	HH	Delivery Time	M	T	W	H	F	S	N	Schedule Repeats	Starting Date Week of	Order Type	Order Group	Production Build Days Early	Route
1		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
2		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
3		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
4		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
5		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
6		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
7		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
8		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]
9		1	12:00 AM	C	C	C	C	C	C	C	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]

[New] [Update] [Standards] [Discontinue] [Cancel] [Exit]

The following is a list of all the Area Level Fields on the Editor Screen that may be filled in when creating a new Area or editing an existing Area.

Area Name: The Area Name is a required field for the area to function correctly. The Area Name can be an alpha-numeric and have up to 30 characters. The Area Name is displayed on many reports and is often used to identify the Area in the reports.

Area Type: There are four Area Types available. New Areas default to Patient Care which usually represent inpatient units. Ancillary is for all other areas that use linen. The Total Stores is normally selected for inventory purposes. The Linen Room is the primary area which receives linen from the laundry and/or distributes linen out to all the other Areas. A facility may only have one Laundry/Linen Room Area Type for reporting purposes. Area Type is used on some reports to calculate and/or display data by Area Type.

Distribution Method: Allows for Areas to be designated as Exchange Cart or Closet. This field is informational only and is displayed on some of the reports.

Variable %: The variable is an optional percentage applicable to the Cart/Closet Stock report. It adds a safety stock quantity calculation to the recommended cart/closet item standards when running the report. The default is set to 0.

Beds: Informational Only – Number of beds in an area may be entered.

Access: New areas created will default to Facility Access. The Access field designates who can access the area to make changes to an area.

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1. Laundry Access: Requires a user to have access to the laundry and the facility and Utilization Master Files. A user with access to the facility but not the laundry can view the area but cannot edit any of the fields in the Area or the Area's Standard Master.

2. Facility Access: Users with security privileges for Utilization Master Files may view and edit most of the area fields. Laundry functions may only be edited if a user has access to the laundry and the facility. Laundry functions include Order Type, Order Group, Production Build Days, and Route.

Carts: An area may have up to nine carts. Areas should have at least one cart active to be effectively utilized for data entry and reporting. When a cart is added, a new cart row is displayed in the Cart setup section of the Editor and is added to the Cart Level View. The Cart setup is reviewed below in the Cart Level Fields Section.

Account #: Field provided to enter an internal hospital or laundry accounting department code. Appears on some reports and is available on some Cost reports to display data by Account #.

Group: Field provided to enter an area group. Allows you to group similar Areas from different Facilities in some reports. To create an Area Group, go to the Settings menu, Groups, Setup Area Groups. Once created, an Area Group will populate in the dropdown field, and is available for optional selection.

Benchmark Area: Provides a list of clinical areas frequently used in National Benchmarks. Defaults to Other.

KPI Target: Field is provided to establish a Pounds per Activity Benchmark Target for the Area.

Exchange Basis: This field can affect how orders are created based on a Facilities setup. If the Facility Master is set to create orders by Usage, then the Exchange Basis determines if the area is using usage or standards to create orders built by the laundry. If the Facility Master is set to create orders using Standards, then the Exchange basis does not apply.

The Following Area Level Fields only appear on and can only be edited on the Area Level View of the Distribution Point Table.

Activity: This field is informational only, to show average daily activity for an Area.

Arrange: The field is optional. Assigning each Area, a sequential number, creates an order of appearance on the Activity data entry screen.

Cart Level Fields

Cart #	Cart/Closet Description	HH	Delivery Time	M	T	W	H	F	S	N	Schedule Repeats	Starting Date Week of	Order Type	Order Group	Production Build Days Early	Route
1		1	12:00 AM	D	D	D	D	D	D	D	Weekly	1/15/2024	No Order	ZZ - No Order	0	[No Route Selected]

Each Cart has the following setup fields:

Cart #: Numbers 1 to 9

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HH: Each Area Cart may be assigned an HH number from 0 to 9. If multiple mobile devices are used for usage data entry, the user can use the HH field to assign carts to specific handheld units.

Cart/Closet Description: Field to record name or purpose of the cart. Cart/Closet Description appears on Orders, forms, and several reports. The description field can have up to 30 characters.

Delivery Time: Field designed to establish a cart's target delivery time. Delivery Time will appear on Orders, Usage Forms, the Distribution Point Master Report, and the Usage Data Extract Report.

MTWHFSN: Represents the Delivery/Usage and/or Order Schedule for each cart. Schedule is organized from M to N (Monday to Sunday). For each active linen cart, each day of the week is designated with a green D for Delivery/Order/Shipping, or a Yellow O for Open but no Delivery/Order/Shipping scheduled, or a Gray C designates that the unit supported by this cart is closed and not using linen on that day.

This data is useful for several purposes.
1. Identifying carts ordering/shipping schedule. Area carts used for laundry orders and shipping must have a green D to create the order. The ControlTex dashboard displays Facility/Area/Carts that are due to have an order created based on the Green D on the schedule and the production build days early setup. The outstanding orders report also displays the facility/area/carts based on the green D on each scheduled day.

2. Identifying carts to be delivered on a given day (for linen distribution): The ControlTex Dashboard, Carts Scheduled vs. Delivered will display carts needing delivery on a specific day based on if the cart has a green D. If the ControlTex Data Entry App is used on a mobile device, the app can set to display only "Scheduled Carts" based on the Green D.

3. Usage reports calculate average daily usage based on the number of days the area is open. This is indicated by Delivery (D) or Open (O) designations. Also, cart/closet and facility standard reports require identification of delivery days.

Schedule Repeats: Each Cart's Delivery /Usage Schedule will default to repeat weekly. If a Cart's delivery is required less frequently than weekly, then the Schedule Repeat may be changed to support the required delivery schedule. The off weeks would view the Green D delivery days as Open for scheduling and reporting purposes. The following options are provided for Schedule Repeats:

Weekly: Default setting – schedule repeats every week
2 Weeks: Schedule repeats every other week.
3 Weeks: Schedule repeats every 3rd week.
4 Weeks: Schedule repeats every 4th week.

Start Date: A newly created cart defaults to the first Monday on or after the current date. If the schedule is to begin at a later date, using this field will establish the proper start date week to begin. If setting a cart schedule repeat other than weekly, then the start date becomes the first

week the schedule is active and will commence the schedule repeat pattern from that date/week moving forward.

STANDARDS MASTER

Each distribution area within the facility requires its Standards Master setup. The Standards Master may be accessed from the Main Menu, or its Home Screen shortcut tile, or it may be accessed directly from any distribution point master area by clicking on the Standards link.

When opening the Standards Master from the main menu or shortcut tile, select the area to be worked on. All active areas within the facility are available here. Select the area to open the Area's Standards Master.

Each Cart setup within the Area will be represented by a column (Standard 1, Standard 2, Standard 3, etc.). The cart's description and schedule are displayed at the top of each column. Select the Add Item or Pack to see a list of all the available items for this facility. Check the box next to each item you want to assign to this Area. Items routinely delivered or used should be assigned to an Area.

Once the items are added to the Carts Standard Master, assign the items to specific carts within the Area by checking or unchecking the box in each column. The checkbox indicates the item is active for the cart. An item may be cart specific. A check is required for the item to appear on screen for usage data entry and usage forms. The Standards Master has been updated to add a check box at the top of every cart column. The check box allows the user to check all or check none of the items in each cart.

Items added to the Cart Standard Master will default to 0. Enter the item standards to indicate the PAR level for this item on this cart. An item standard can remain zero, a number is not required. The number entered for each item will display on the data entry screen as the Standard.

To remove an item from an Areas Standard Master, use the checkbox column in the first column, to the left of the item number to delete the item(s) from the area list.

If you have additional questions regarding the new features of your ControlTex Distribution Point Master and Standards Master, please contact your ControlTex Representative or call the ControlTex Helpdesk at 1-800-609-3688.

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