

Adding a New CD Stock Entry



This option should be used if you are adding CD items to the CDR to create an opening balance. If stock has been received from a supplier, we recommend accepting this through the Ordering Manager as this will update your Stock Record at the same time as adding a CD balance to your CD Register.

1. To begin, open the CDR Manager from the ProScript Connect Main Screen by clicking the **[ProScript Connect]** menu button and selecting the *CDR Manager* menu item.
2. From the CDR Manager, open the *Weekly Balance* tab and select the **[F2 – Add New CD]** button to open the CDR Balance Adjustments form.

Completing the CDR Balance Adjustments Form

CDR Balance Adjustments
✕

User Details

Name * Role * Registration No *

Stock Details

Dispensed Drug Name i

Stock Level Pack(s) Units Total Units

CDR Balance Pack(s) Units Total Units

Adjustment Details

Actual Balance Pack(s) Units Total Units

Adjustment Reason *

Field/Section	Description
User Details	The signed-in user name and their role are populated by default if configured, but you may have to manually enter the registration number. Otherwise you must fill these details in manually.
Stock Details	Select the [Search Drug] button to search for, locate and select a drug that does not exist in your CD Register. Selecting a drug that already exists will trigger the <i>Drug already added</i> pop-up. After selecting the drug, the <i>Stock Level</i> details will automatically populate with available values, if applicable. These are read-only figures from the Stock Record.
Adjustment Details	This section is disabled by default. To adjust the <i>Actual Balance</i> details, select the [F9 – Edit Balance] button. <i>Opening Balance</i> is selected as the <i>Adjustment Reason</i> by default, but can be amended from the drop-down menu if required... You can also access the selected item's Stock Record by selecting the [Stock card] button.

An opening balance must be entered when adding a CD entry. If your *CDR Balance Total Units* does not match your *Stock Level Total Units* the value will display in **red**.

Adjustment Details

Actual Balance Pack(s) Units Total Units

Adjustment Reason *

Saving the CDR Balance Adjustments Form

- Once the drug, stock level and balance details have been selected and amended as required, select the **[F10 – Save]** button.

If *Prompt to update stock card* is enabled within Edit Application Settings, a pop-up will display confirming the running balance for your newly entered controlled drug has been updated, and will ask if you want to update the stock levels. Selecting **[Yes]** will open the Stock Record for the controlled drug you have entered allowing you to update the stock levels, or selecting **[No]** will return you to the *Weekly Balance* tab.

Update Stock Card

The running balance for this controlled drug has been updated. Do you also wish to update the stock levels?

- The *Weekly Balance* tab in the CDR Manager displays, with the newly-added CD stock entry in the grid.

ProScript Connect | 18 July 2018 10:02 | Responsible Pharmacist Victoria Smith | User The Supervisor

Search (CTRL+S) | Search | Workflow Manager | **CDR Manager**

Warning: It is illegal to tamper with any records in the Controlled Drugs Register.

Weekly Balance | Items Awaiting Collection | Expired Stock | Patient Return | Inspector Log

F2 - Add New CD | F3 - Adjust CD Stock Balance | F4 - Add Goods In | Stock card | F5 - Run Weekly Balance Check | F6 - CD Register Report

Filters

Dispensed Drug Use Drug Class Hide Zero Balance

Show Expired Stock Only Hide Closed Register

Show Stock Details

Drug Class	Dispensed Drug	Total Running Balance	Expired Quantity
Ketamine (IV)	Ketamine soln for inj 500mg/10ml vial (10) HAMELN	20.00	0.00
Lisdexamfetamine	Elvanse 30mg caps (28) SHIRE	56.00	0.00
Methadone	Methadone 1mg/1ml oral soln (100ml) ROSEMONT	1,314.00	0.00
Methadone	Methadone Green SF 1mg/1ml oral soln (100ml) ROSEMONT	2,000.00	0.00
Methylphenidate	Concerta XL 36mg tabs *PI* (30) AAH	120.00	0.00
Methylphenidate	Delmosart PR 54mg tabs (30) ACTAVIS	60.00	0.00
CDR Running balance (Packs)	2		
CDR Running balance (Units)	0.00		
Stock (Packs)	2		
Stock (Units)	0.00		

The weekly balance check was last run on 16/07/2018 10:51:26. Total Records 42

CD Register Entry

Adding a new CD stock entry is an event that will write an entry into the CD Register which can be viewed when printing and/or exporting a CD Register report and will display;

- The *Date Supply received or date supplied* column populated with;
 - The date and time the event occurred
 - A unique CDR ID
 - The pack size and unit of measure of the CD
 - Name, role and registration number of the user
- The *Quantity Received* i.e. The *Actual Balance Total Units* figure entered within the CDR Balance Adjustments window when adding your CD
- The total running *Balance* after the event. For new CD stock entries this will match your *Quantity Received* value
- *Notes* describing the event, in this case an *Adjustment* and the reason for the adjustment

Report Preview

CD Register

From: 18/07/2018 To: 18/07/2018
 Drug Class: Ketamine (IV) Name/Brand: Ketamine soln for inj 500mg/10ml vial (10) HAMELN Strength: 500mg/10ml Form: vial

Date Supply received or date supplied	Received		Supplied					Balance	Notes	
	Name and address from whom received	Quantity Received	Name and address of person or firm supplied	Details of authority to possess; prescriber or licence holder's details	Person collecting schedule 2 controlled drug (patient / patient's rep / healthcare professional) and if healthcare professional, name and address	Was proof of identity requested of patient / patient's rep? (Yes / No)	Was proof of identity of person collecting provided (Yes / No)			Quantity Supplied
18/07/2018 10:01 CDR ID: 526 Pack Size: 10 vials Name: Ryan Peterson Role: Pharmacist RegNo: 2012345		20.00							20.00	Adjustment Opening Balance

100 %

Revision History

Version Number	Date	Revision Details	Author(s)
1.0	11 June 2019		Joanne Hibbert-Gorst

Contact us

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