

Batch Collecting CD SDM Instalments



We recommend amending the SDM/ID Script Expiry Days Controlled application setting to reflect the duration of your SDM prescription.

ProScript Connect provides the ability to batch collect SDM instalments for CD items when you have more than one instalment that has been collected.

Use the table below to see when CDR triggers will display, and when entries will be recorded in the CD Register when processing an SDM instalment for a CD

Event Description	CDR Triggers	Items Awaiting Collection	CD Register Entry
Schedule created with all instalments To Be Dispensed	X	X	X
Instalment(s) marked as Dispensed	✓	✓	X
Instalment(s) marked as Collected	✓	X	✓
Instalment(s) status change: 1. From To Be Dispensed to Not Dispensed 2. From To Be Dispensed to Cancelled	X	X	X
Instalment(s) status change: 1. From Dispensed to Not Dispensed 2. From Dispensed to Cancelled	X	X	X
Instalment(s) status change: 1. From Collected to any status	X	<i>Only if status is changed to Dispensed</i>	✓

Locating the SDM Instalments

It is recommended to mark CD SDM instalments as collected from the CDR Manager, but this can also be done within the SDM Manager.

Locating the Instalments in the CDR Manager

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 *Items Awaiting Collection* tab, use the available *Filters* to display all the instalments you want to mark as collected in the grid.

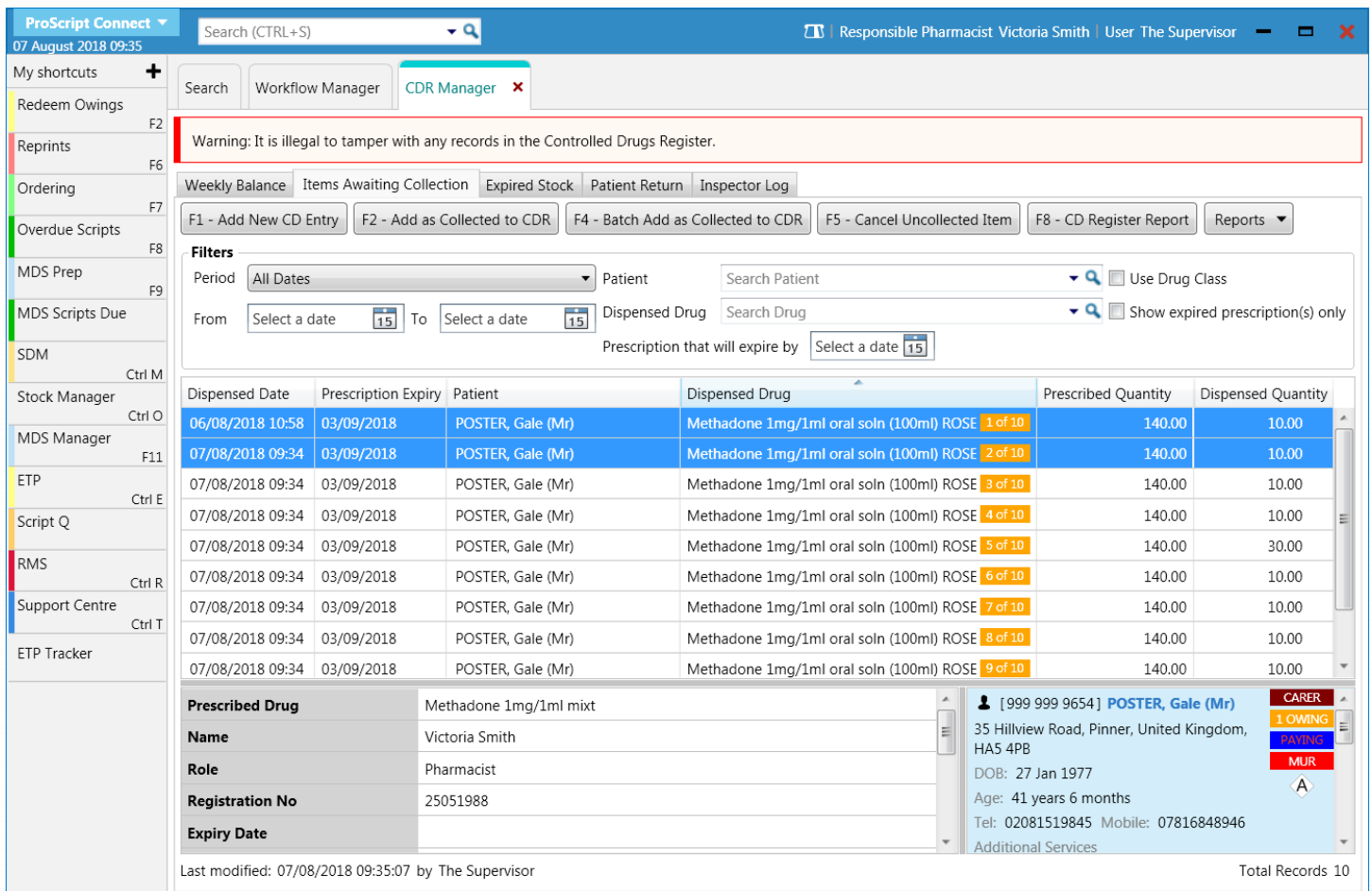


The date filters will adjust records in the grid based on their *Dispensed Date* which may not necessarily correspond to the collection date. If records are selected to mark as collected before their due date, a Collect Instalment pop-up will display advising that the instalment cannot be collected as it has a future date.

3. Once the grid has been filtered as required, you can:
 - Use **[Ctrl+left-click]** to select instalments you want to mark as collected one at a time
 - Use **[Shift+left-click]** to highlight all consecutive instalments within your first and last click range for marking as collected
4. With the instalments highlighted, select the **[F4 – Batch Add as Collected to CDR]** button.



You can easily identify the SDM/ID instalments that are awaiting collection by using the orange **X of Y** tags that display within the *Dispensed Drug* column.



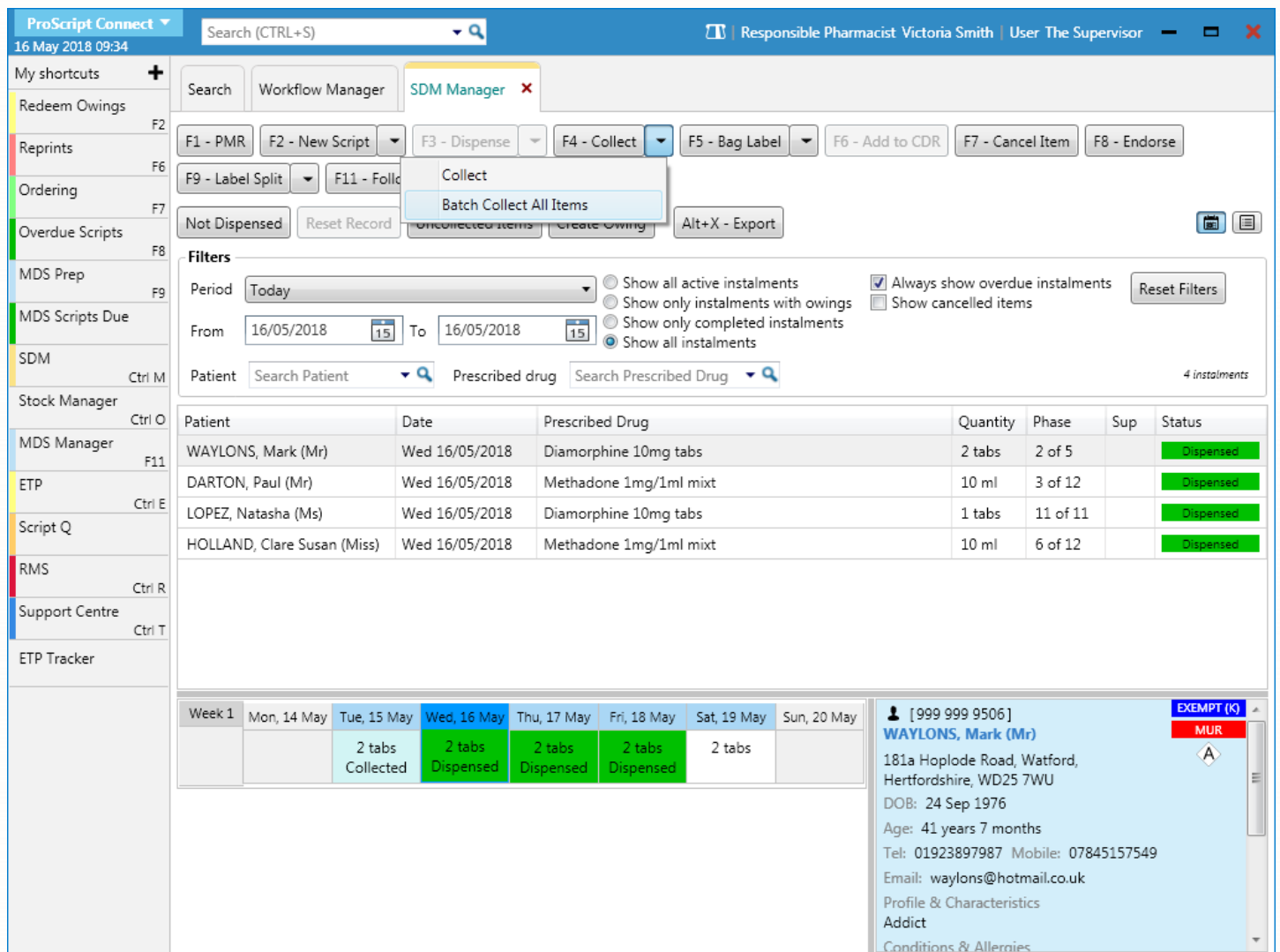
The screenshot shows the ProScript Connect CDR Manager interface. At the top, there is a search bar and a warning message: "Warning: It is illegal to tamper with any records in the Controlled Drugs Register." Below the warning, there are tabs for "Weekly Balance", "Items Awaiting Collection", "Expired Stock", "Patient Return", and "Inspector Log". The "Items Awaiting Collection" tab is active, showing a grid of dispensed drugs. The grid has columns for "Dispensed Date", "Prescription Expiry", "Patient", "Dispensed Drug", "Prescribed Quantity", and "Dispensed Quantity". The "Dispensed Drug" column contains orange tags indicating the number of instalments collected out of the total (e.g., "1 of 10", "2 of 10", etc.).

Dispensed Date	Prescription Expiry	Patient	Dispensed Drug	Prescribed Quantity	Dispensed Quantity
06/08/2018 10:58	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 1 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 2 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 3 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 4 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 5 of 10	140.00	30.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 6 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 7 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 8 of 10	140.00	10.00
07/08/2018 09:34	03/09/2018	POSTER, Gale (Mr)	Methadone 1mg/1ml oral soln (100ml) ROSE 9 of 10	140.00	10.00

Below the grid, there is a patient profile for POSTER, Gale (Mr) with contact information and a list of services (CARER, 1 OWING, PAYING, MUR). The interface also shows a sidebar with various shortcuts and a bottom status bar indicating the last modified time and total records.

Locating the Instalments in the SDM Manager

1. To begin, open the SDM Manager from the ProScript Connect Main Screen by pressing **[Ctrl+M]**.
2. The SDM Manager displays. Use the available *Filters* to display all the instalments you want to dispense in the grid. We recommend setting the *Period* to *Today*.
3. Once the grid has been filtered as required, select the arrow on the **[F4 – Collect]** button and choose the *Batch Collect All Items* option.



Filters

Period: **Today**

From: 16/05/2018 To: 16/05/2018

Show all active instalments
 Show only instalments with owings
 Show only completed instalments
 Show all instalments

Always show overdue instalments
 Show cancelled items

Reset Filters

Patient: Search Patient Prescribed drug: Search Prescribed Drug 4 instalments

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
WAYLONS, Mark (Mr)	Wed 16/05/2018	Diamorphine 10mg tabs	2 tabs	2 of 5		Dispensed
DARTON, Paul (Mr)	Wed 16/05/2018	Methadone 1mg/1ml mixt	10 ml	3 of 12		Dispensed
LOPEZ, Natasha (Ms)	Wed 16/05/2018	Diamorphine 10mg tabs	1 tabs	11 of 11		Dispensed
HOLLAND, Clare Susan (Miss)	Wed 16/05/2018	Methadone 1mg/1ml mixt	10 ml	6 of 12		Dispensed

Week 1	Mon, 14 May	Tue, 15 May	Wed, 16 May	Thu, 17 May	Fri, 18 May	Sat, 19 May	Sun, 20 May
		2 tabs Collected	2 tabs Dispensed	2 tabs Dispensed	2 tabs Dispensed	2 tabs	

WAYLONS, Mark (Mr)
 181a Hoplude Road, Watford, Hertfordshire, WD25 7WU
 DOB: 24 Sep 1976
 Age: 41 years 7 months
 Tel: 01923897987 Mobile: 07845157549
 Email: waylons@hotmail.co.uk
 Profile & Characteristics
 Addict
 Conditions & Allergies

4. The SDM Batch Collection window opens where you can;
 - o Use **[Ctrl+left-click]** to select instalments you want to mark as collected one at a time and select the **[F4 – Collect Selected Items]** button.
 - o Use **[Shift+left-click]** to highlight all consecutive instalments within your first and last click range for marking as collected and select the **[F4 – Collect Selected Items]** button.
 - o Select the **[F10 – Collect All]** button to mark all the instalments that appear in the grid as collected.

Batch Collection


Filters
 Status: Dispensed Show Overdue items Only show items with Owings

Patient	Due Date	Prescribed Drug	Quantity	Sup	Status
WAYLONS, Mark (Mr)	16/05/2018	Diamorphine 10mg tabs	2 tabs		Dispensed
DARTON, Paul (Mr)	16/05/2018	Methadone 1mg/1ml mixt	10 ml		Dispensed
LOPEZ, Natasha (Ms)	16/05/2018	Diamorphine 10mg tabs	1 tabs		Dispensed
HOLLAND, Clare Susan (Ms)	16/05/2018	Methadone 1mg/1ml mixt	10 ml		Dispensed

Prescriber Details
 ASLAM, A
 CALLOWLAND SURGERY
 THE CALLOWLAND SURGERY 141A LEAVESDEN ROAD
 WATFORD
 HERTFORDSHIRE
 WD24 5DG

Patient Details
 [999 999 9506] EXEMPT (K)
WAYLONS, Mark (Mr) MUR
 181a Hoplude Road,
 Watford, Hertfordshire,
 WD25 7WU
 DOB: 24 Sep 1976

F4 - Collect Selected Items F10 - Collect All

 You can filter within this window to show/hide overdue instalments, or only show instalments with owings.

Confirming the Collection Details

1. The Confirm Collection window opens for the first instalment. Select the *Pharmacist* if required, confirm the collection and drug details and select the **[F10 – Collect]** button.

Confirm Collection

Schedule


Week 1	Mon, 14 May	Tue, 15 May	Wed, 16 May	Thu, 17 May	Fri, 18 May	Sat, 19 May	Sun, 20 May
		2 tablets Collected	2 tablets Dispensed	2 tablets Dispensed	2 tablets Dispensed	2 tablets	

Prescriber Details
 ASLAM, A
 CALLOWLAND SURGERY
 THE CALLOWLAND SURGERY 141A LEAVESDEN ROAD
 WATFORD
 HERTFORDSHIRE
 WD24 5DG

Patient Details
 [999 999 9506] EXEMPT (K)
WAYLONS, Mark (Mr) MUR
 181a Hoplude Road, Watford,
 Hertfordshire, WD25 7WU
 DOB: 24 Sep 1976
 Age: 41 years 7 months
 Tel: 01923897987
 Mobile: 07845157549
 Email: waylons@hotmail.co.uk
 Profile & Characteristics
 Addict
 Conditions & Allergies
 [X]Heroin addiction 23/01/2018
 1
 Elected Services

Instalment
 Pharmacist **Ryan Peterson - RegNo: 891002**
 Collected On Wed 16/05/2018 09:40 Quantity 2.000
 Dispensed Item Diamorphine 10mg tabs (100) AURUM

F10 - Collect

 At this point, you can create an owing if required. We strongly recommend creating owings for CDR items prior to collection.

Completing the CDR Dispensed Goods Window

The CDR Dispensed Goods window is displayed. The *Collection Details* section is enabled, with the *Collected* tick box already selected, and all details entered at the time the entry was saved as awaiting collection are pre-populated.

CDR Dispensed Goods
— □ ×

Signed Order/Requisitions Purpose of requisition * Profession/Occupation *

Patient Details

Patient Name * WAYLONS, Mark (Mr)

Patient Address * 181a Hoplude Road
Watford
Hertfordshire
WD25 7WU

Dispensing and prescriber details

Prescribed Drug * i

Dispensed Drug * i

Dispensed quantity *
(Total Unit(s))

Prescriber Name * ASLAM, A
CALLOWLAND SURGERY Search Prescriber

Dispenser Details

Name * Role * Registration No *

Date * Time *

Current CDR Stock Balance

CDR Balance Pack(s) Units Total Units

NOTE: This is the current CDR Balance, prior to collection.

Collection Details

Collected Collection Date Collection Time Supervised


Known to Pharmacist ID Requested ID Supplied ID Type

Collected by Patient Representative Collected by Health Care Professional

Name Relationship

Address

Field/Section	Description	
Patient Details	The patient details are pre-populated. These details cannot be edited on this screen. If you wish to edit these, you will need to exit this screen and return to the patient's <u>PMR</u> .	
Dispensing and Prescriber Details	The drug and prescriber details are pre-populated with the details entered when entering the new script.	
Dispenser Details	The user that saved the entry as awaiting collection, and their role and registration number, are populated by default but can be edited if required. The <i>Date</i> and <i>Time</i> fields are read-only based on the system date and time of dispensing.	
Current CDR Stock Balance	This section provides you with an indication of your current CDR balance prior to collection. It is not directly editable, but you can use the [CDR Balance adjustment] button to adjust the CD Stock Balance for the selected item if required.	
Collection Details	<p>This section is enabled, with the Collected tick box already selected and disabled. In this section you can;</p> <ul style="list-style-type: none"> ○ Edit the <i>Collection Time</i> with the time of collection. This cannot be a future time, or a time before the dispensing event took place if both dispensing and collection occur on the same day. ○ Select whether the item was <i>Supervised</i>, in which case the recipient is considered to be the patient. Selecting that the items were collected by a <i>Patient Representative</i> or <i>Health Care Professional</i> after ticking the <i>Supervised</i> box will deselect and disable this field. ○ Select whether the recipient is known to the pharmacist, if ID has been requested, if ID has been supplied, and if supplied, enter which type of ID was supplied e.g. Driving License ○ Select whether the item was collected by a Patient Representative or Health Care Professional. This will disable the <i>Supervised</i> tick box. ○ If selected, enter the Patient Representative or Health Care Professional's <i>Name, Relationship, and Address</i> 	

 If there is no CDR balance available for the item, the system will advise that you will not be able to save this CD entry as *Collected*, and will highlight the item's current CDR balance. You can adjust the CDR balance from the CDR Dispensed Goods form by clicking **[CDR Balance adjustment]** and pressing **[F9 – Edit Balance]**.



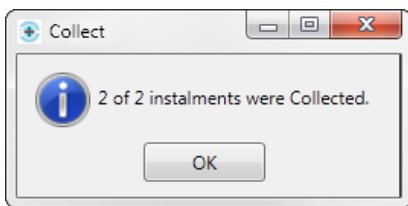
If you do adjust the CDR balance, an alert may appear when attempting to save the CD entry to the CD Register advising that the *Collection Time* must be after the latest CDR balance adjustment. The alert will also provide the date and time the latest adjustment was completed. In this instance, ensure that the *Collection Time* is updated to reflect the actual collection time, which will most likely be the current/system time and only a minute or two greater than the time that is currently entered in this field. This will ensure that the CD Register entry for both the balance adjustment and collection event is displayed correctly, by order of events.

Saving the CDR Dispensed Goods Form

1. Once any required changes have been made and Collection Details have been completed, select the **[F10 – Save to CD Register]** button.

Processing the Next Instalment

1. The Confirm Collection window opens for the next instalment. Repeat the steps above to select the pharmacist, confirm the collection details and complete the CDR Dispensed Goods window. Repeat this process for each instalment.
2. A Collect pop-up window displays, confirming the number of instalments which have been collected. Select the **[OK]** button.



3. If all instalments for any of the prescriptions have been collected, an Instalment Dispensing Complete pop-up window will display asking if you would like to endorse the script now, otherwise the Batch Collection window is displayed. If all required collections have been marked, close the window by selecting the **[Close]** button.
4. You are returned to your starting point, where the following updates have occurred;
 - The instalments are marked as **Collected** within the SDM Manager
 - The item awaiting collection entries has been removed from the CDR Manager



Entries for each collection event will be written to the CD Register.

ProScript Connect | Search (CTRL+S) | Responsible Pharmacist Victoria Smith | User The Supervisor

16 May 2018 09:59

My shortcuts: Redeem Owings, Reprints, Ordering, Overdue Scripts, MDS Prep, MDS Scripts Due, SDM, Stock Manager, MDS Manager, ETP, Script Q, RMS, Support Centre, ETP Tracker

Search | Workflow Manager | SDM Manager

F1 - PMR | F2 - New Script | F3 - Dispense | F4 - Collect | F5 - Bag Label | F6 - Add to CDR | F7 - Cancel Item | F8 - Endorse

F9 - Label Split | F11 - Follow-on | F12 - Reports

Not Dispensed | Reset Record | Uncollected Items | Create Owing | Alt+X - Export

Filters

Period: Today | Show all active instalments | Show only instalments with owings | Show only completed instalments | Show all instalments | Always show overdue instalments | Show cancelled items | Reset Filters

From: 16/05/2018 To: 16/05/2018

Patient: Search Patient | Prescribed drug: Search Prescribed Drug | 4 instalments

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
WAYLONS, Mark (Mr)	Wed 16/05/2018	Diamorphine 10mg tabs	2 tabs	2 of 5		Collected
DARTON, Paul (Mr)	Wed 16/05/2018	Methadone 1mg/1ml mixt	10 ml	3 of 12		Dispensed
LOPEZ, Natasha (Ms)	Wed 16/05/2018	Diamorphine 10mg tabs	1 tabs	11 of 11		Collected
HOLLAND, Clare Susan (Miss)	Wed 16/05/2018	Methadone 1mg/1ml mixt	10 ml	6 of 12		Dispensed

Week 1 | Mon, 14 May | Tue, 15 May | Wed, 16 May | Thu, 17 May | Fri, 18 May | Sat, 19 May | Sun, 20 May

2 tabs Collected | 2 tabs Collected | 2 tabs Dispensed | 2 tabs Dispensed | 2 tabs

[999 999 9506]
WAYLONS, Mark (Mr)
 181a Hoplude Road, Watford, Hertfordshire, WD25 7WU
 DOB: 24 Sep 1976
 Age: 41 years 7 months
 Tel: 01923897987 Mobile: 07845157549
 Email: waylons@hotmail.co.uk
 Profile & Characteristics
 Addict
 Conditions & Allergies

EXEMPT (K) MUR

CD Register Entry

Marking CD entries as collected 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 *Name and address of person or firm supplied* column populated with the patient, or signed order transfer/requisition details
- The *Details of authority to possess* column populated with the prescriber details, if applicable
- The *Person collecting controlled drug* column populated with either the patient, recipient, health care professional or patient representative name and address
- If *proof of identity was requested* and if *proof of identity was provided*
- The *Quantity Supplied* i.e. The *Dispensed quantity* figure entered within the CDR Dispensed Goods window
- The total running *Balance* after the event
- *Notes* describing the event, which could include;

- Details of ID provided and if the person collecting the CD(s) was known to the pharmacist
- Signed order transfer/requisition details
- Prescription serial number and instalment X of Y details (SDM only)
- Owing status

Report Preview

CD Register

From: 16/05/2018 To: 16/05/2018
 Drug Class: Diamorphine Name/Brand: Diamorphine 10mg tabs (100) AURUM Strength: 10mg Form: tabs

Date Supply received or date supplied	Received		Supplied							
	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's rep? (Yes / No)	Was proof of identity of person collecting provided (Yes / No)	Quantity Supplied	Balance	Notes
16/05/2018 09:40 CDR ID: 221 Pack Size: 100 tablets Name: Toby MacElroy Role: Pharmacist RegNo: 606198			WAYLONS, Mark (Mr) 181a Hoplude Road Watford Hertfordshire WD25 7WU	ASLAM, A CALLOWLAND SURGERY THE CALLOWLAND SURGERY 141A LEAVESDEN ROAD WATFORD HERTFORDSHIRE WD24 5DG RegNo: G9348932	Patient: WAYLONS, Mark (Mr) 181a Hoplude Road Watford Hertfordshire WD25 7WU	Yes	Yes	2.00	160.00	Serial Number: ADDED: 15-05-18 12:31:06.52 Instalment 2 of 5 Known To Pharmacist ID: Driving license
16/05/2018 09:49 CDR ID: 222 Pack Size: 100 tablets Name: Toby MacElroy Role: Pharmacist RegNo: 606198			LOPEZ, Natasha (Ms) 2 Uxbridge Road Pinner United Kingdom HA5 4EA	POURALOS, Stamatios HATCH END MEDICAL CENTRE HATCH END HEALTH CENTRE 577 UXBRIDGE ROAD HATCH END PINNER MIDDLESEX HA5 4RD RegNo: 7033670	Patient: LOPEZ, Natasha (Ms) 2 Uxbridge Road Pinner United Kingdom HA5 4EA	No	No	1.00	159.00	Serial Number: ADDED: 03-05-18 10:39:00.52 Instalment 11 of 11 Known To Pharmacist

100%

Revision History

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

Contact us

For more information contact:
Telephone: 0344 209 2601