

# Marking a CD SDM Instalment as Collected

 We recommend amending the *SDM/ID Script Expiry Days Controlled* [application setting](#) to reflect the duration of your SDM prescription.

When marking a CD Schedule 2 (or Schedule 3 if configured) SDM instalment as collected, a CDR trigger will display, prompting you to also add a CD entry marked as collected. You can only mark instalments as collected on the day they are due to be collected.

[See 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>	✓

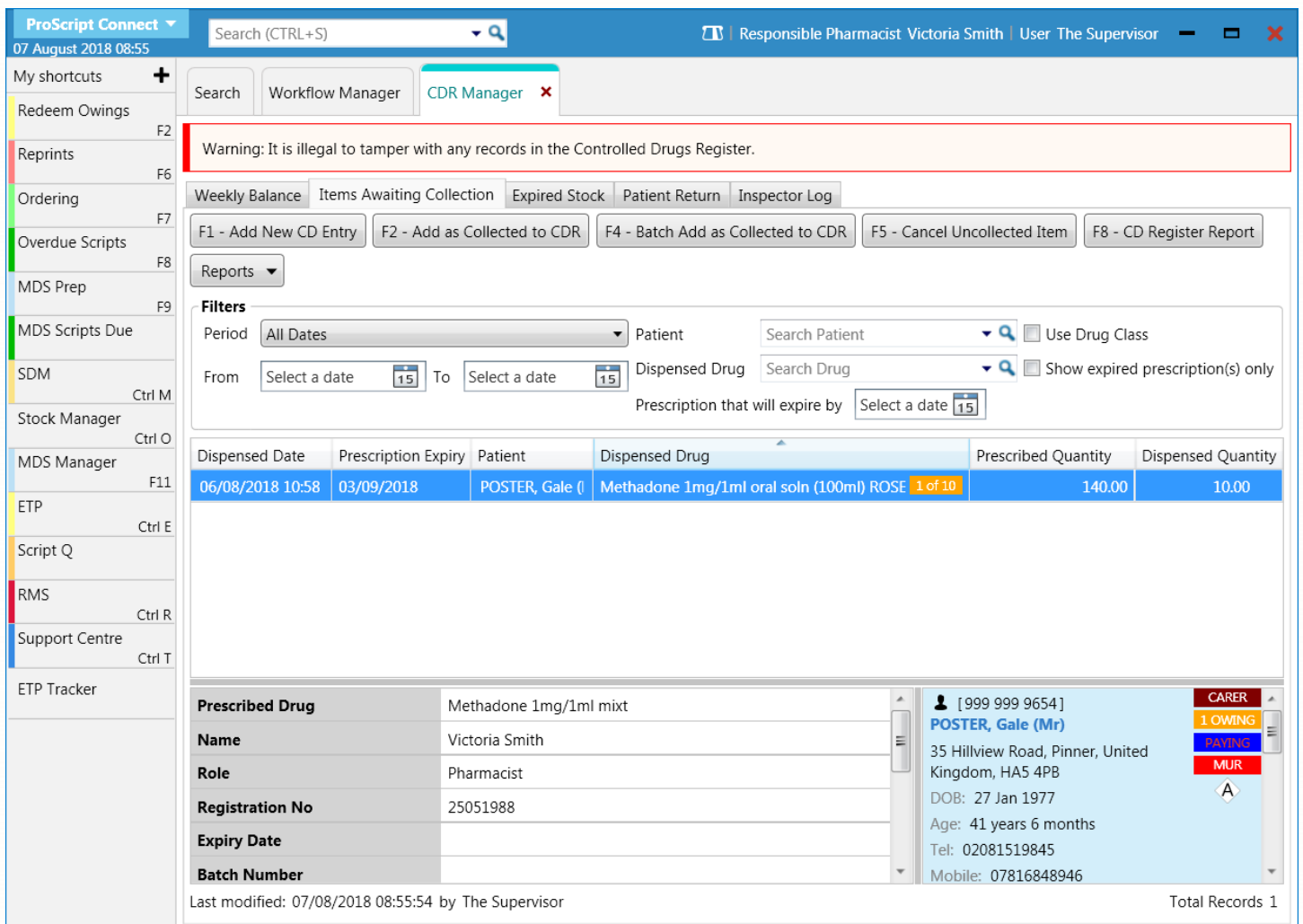
# Locating the SDM Instalment

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 Instalment 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 locate and highlight the instalment being collected and select the **[F2 – 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 this, 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 table of dispensed drugs. The table has columns for "Dispensed Date", "Prescription Expiry", "Patient", "Dispensed Drug", "Prescribed Quantity", and "Dispensed Quantity". One row is highlighted in blue, showing a dispensed drug of "Methadone 1mg/1ml oral soln (100ml) ROSE" with a tag "1 of 10" in the "Dispensed Drug" column. Below the table, there is a patient profile for "POSTER, Gale (Mr)" with details such as "35 Hillview Road, Pinner, United Kingdom, HA5 4PB", "DOB: 27 Jan 1977", "Age: 41 years 6 months", "Tel: 02081519845", and "Mobile: 07816848946". The patient profile also shows a "CARER" status and a "1 OWING" tag. The interface includes a sidebar with shortcuts for various functions like "Redeem Owings", "Reprints", "Ordering", "Overdue Scripts", "MDS Prep", "MDS Scripts Due", "SDM", "Stock Manager", "MDS Manager", "ETP", "Script Q", "RMS", "Support Centre", and "ETP Tracker".

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 <b>1 of 10</b>	140.00	10.00

**Prescribed Drug** Methadone 1mg/1ml mixt

**Name** Victoria Smith

**Role** Pharmacist

**Registration No** 25051988

**Expiry Date**

**Batch Number**

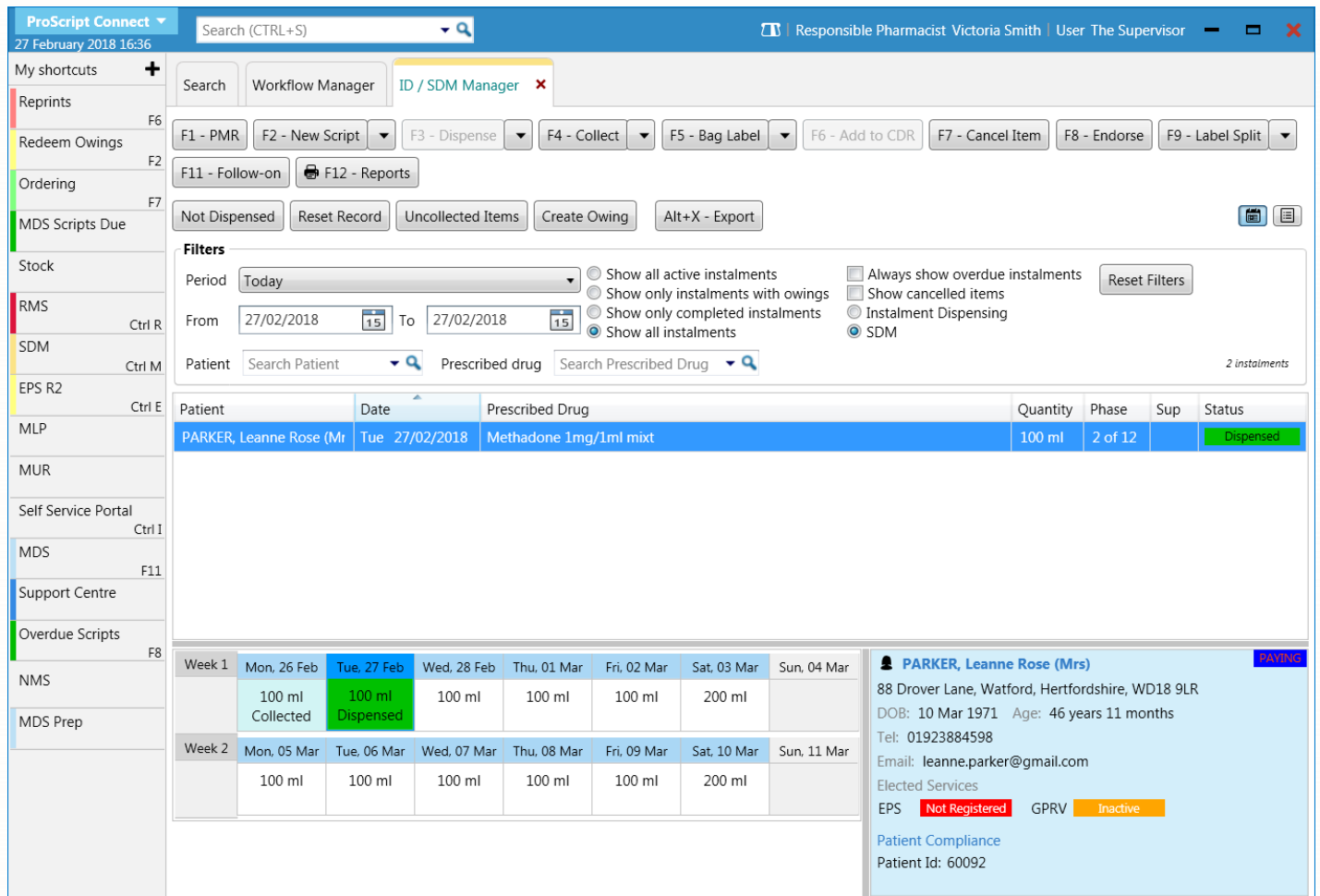
**Patient Profile:** [999 999 9654] **POSTER, Gale (Mr)**  
 35 Hillview Road, Pinner, United Kingdom, HA5 4PB  
 DOB: 27 Jan 1977  
 Age: 41 years 6 months  
 Tel: 02081519845  
 Mobile: 07816848946

Tags: CARER, 1 OWING, PAYING, MUR

Last modified: 07/08/2018 08:55:54 by The Supervisor Total Records 1

## Locating the Instalment 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 search for, locate and highlight the instalment and select the **[F4 – Collect]** button.



The screenshot shows the ProScript Connect interface with the SDM Manager window open. The top navigation bar includes a search bar and the user's name, Victoria Smith. The left sidebar lists various shortcuts like Reprints, Redeem Owings, and MDS Scripts Due. The main area contains a toolbar with buttons for F1-F9 functions, a Filters section, and a table of instalments.

**Filters:**

- Period: Today
- From: 27/02/2018 To: 27/02/2018
- Options:
  - Show all active instalments
  - Show only instalments with owings
  - Show only completed instalments
  - Show all instalments
  - Always show overdue instalments
  - Show cancelled items
  - Instalment Dispensing
  - SDM
- Reset Filters

**Instalment Table:**

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
PARKER, Leanne Rose (Mr)	Tue 27/02/2018	Methadone 1mg/1ml mixt	100 ml	2 of 12		Dispensed

**Weekly Schedule:**

Week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Week 1	100 ml Collected	100 ml Dispensed	100 ml	100 ml	100 ml	200 ml	
Week 2	100 ml	100 ml	100 ml	100 ml	100 ml	200 ml	

**Patient Details:**

- PARKER, Leanne Rose (Mrs)** (PAYING)
- 88 Drover Lane, Watford, Hertfordshire, WD18 9LR
- DOB: 10 Mar 1971 Age: 46 years 11 months
- Tel: 01923884598
- Email: leanne.parker@gmail.com
- Elected Services:
  - EPS: Not Registered
  - GPRV: Inactive
- Patient Compliance: Patient Id: 60092

## Confirming the Collection Details

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

Confirm Collection

Schedule							
Week 1	Mon, 26 Feb	Tue, 27 Feb	Wed, 28 Feb	Thu, 01 Mar	Fri, 02 Mar	Sat, 03 Mar	Sun, 04 Mar
	100 ml Collected	100 ml Dispensed	100 ml	100 ml	100 ml	200 ml	
Week 2	Mon, 05 Mar	Tue, 06 Mar	Wed, 07 Mar	Thu, 08 Mar	Fri, 09 Mar	Sat, 10 Mar	Sun, 11 Mar
	100 ml	100 ml	100 ml	100 ml	100 ml	200 ml	

**Instalment**

Pharmacist **Victoria Smith - RegNo: 25051988**

Collected On   Quantity

Dispensed Item Methadone 1mg/1ml mixt (500ml) UNI

**Prescriber Details**

KAHUSIK, Rama

SCHOPWICK SURGERY  
EVERETT COURT, ROMELAND  
ELSTREE  
HERTFORDSHIRE  
WD63BJ

---

**Patient Details**

**PARKER, Leanne Rose (Mrs)** PAYING

88 Drover Lane, Watford,  
Hertfordshire, WD18 9LR  
DOB: 10 Mar 1971  
Age: 46 years 11 months  
Tel: 01923884598  
Email: leanne.parker@gmail.com

Elected Services  
EPS Not Registered  
GPRV Inactive

**Patient Compliance**  
Patient Id: 60092

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 Form

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: \* PARKER, Leanne Rose (Mrs)

Patient Address: \* 88 Drover Lane  
Watford  
Hertfordshire  
WD18 9LR

**Dispensing and prescriber details**

Prescribed Drug \*  i

Dispensed Drug \*  i

Dispensed quantity \*   
(Total Unit(s))

Prescriber Name \* KAHUSIK, Rama    SCHOPWICK 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  200

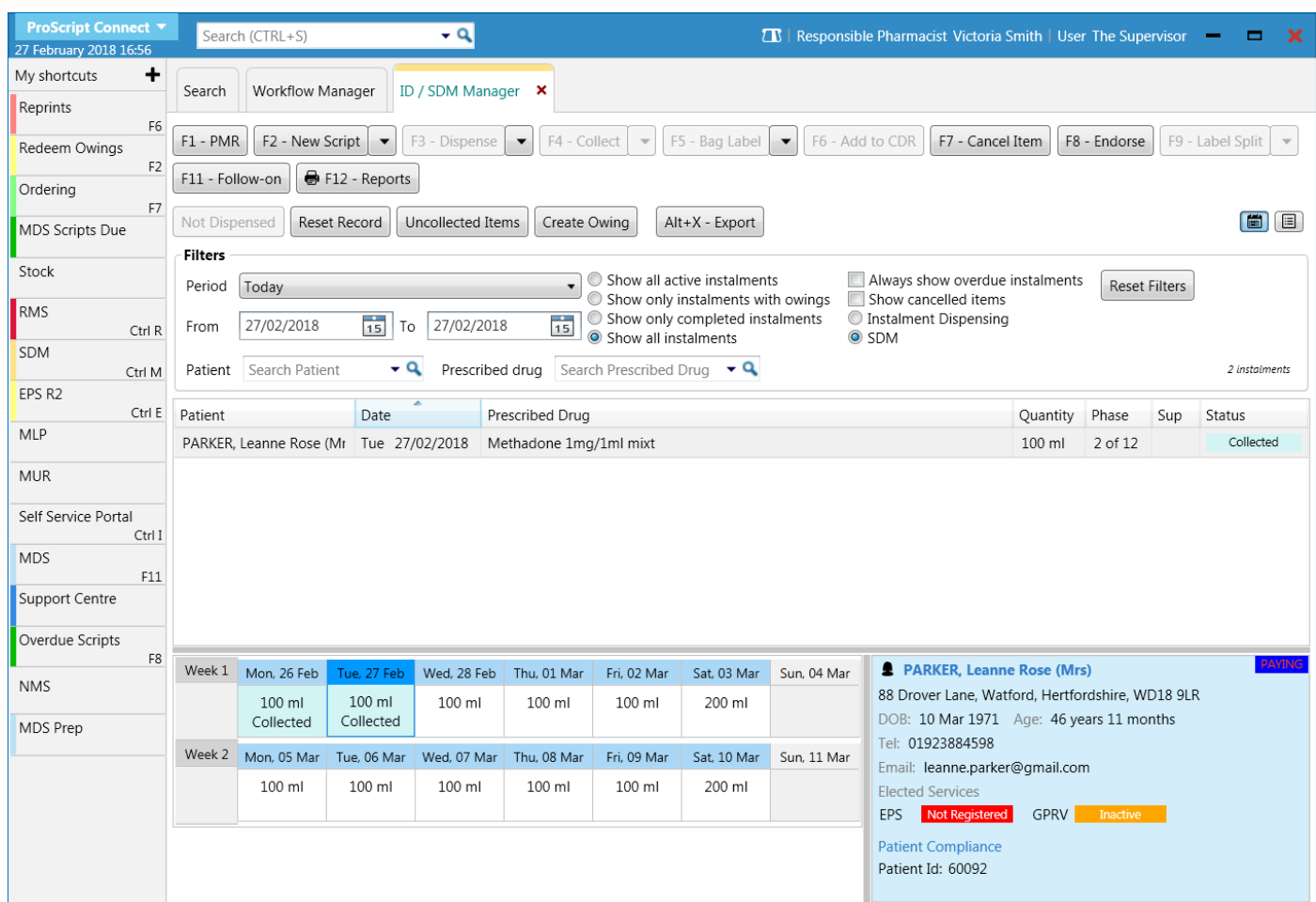
Field/Section	Description
Patient Details	The patient details are pre-populated. These details cannot be edited on this screen. If you wish to edit these, you will need to exit this screen and return to the patient's PMR.
Dispensing and Prescriber Details	The drug and prescriber details are pre-populated 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 <b>[CDR Balance adjustment]</b> 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"> <li>○ 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.</li> <li>○ 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.</li> <li>○ 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</li> <li>○ Select whether the item was collected by a Patient Representative or Health Care Professional. This will disable the <i>Supervised</i> tick box.</li> <li>○ If selected, enter the Patient Representative or Health Care Professional's <i>Name, Relationship, and Address</i></li> </ul>

 If there is no CDR balance available for the item and you attempt to save the entry as *Collected*, the system will advise that you will not be able to do this, 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 if attempting to save the CD entry as *Collected* to the CD Register. This will advise 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

- Once any required changes have been made and Collection Details have been completed, select the **[F10 – Save to CD Register]** button.
- If you have marked the final instalment as collected, an Instalment Dispensing Complete pop-up window will display asking whether you would like to endorse the script now, otherwise you are returned to your starting point, where the following updates have occurred;
  - The instalment is marked as **Collected** within the SDM Manager
  - The item awaiting collection entry has been removed from the CDR Manager
- An entry will be written to the CD Register Report.



**ProScript Connect** | 27 February 2018 16:56 | Responsible Pharmacist Victoria Smith | User The Supervisor

Search (CTRL+S) | ID / SDM Manager

Workflow 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

Filters: Period Today, From 27/02/2018 To 27/02/2018, Patient Search Patient, Prescribed drug Search Prescribed Drug

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
PARKER, Leanne Rose (Mr)	Tue 27/02/2018	Methadone 1mg/1ml mixt	100 ml	2 of 12		Collected

2 instalments

**PARKER, Leanne Rose (Mrs)**  
 88 Drover Lane, Watford, Hertfordshire, WD18 9LR  
 DOB: 10 Mar 1971 Age: 46 years 11 months  
 Tel: 01923884598  
 Email: leanne.parker@gmail.com  
 Elected Services: EPS **Not Registered** GPRV **Inactive**  
 Patient Compliance  
 Patient Id: 60092

## 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: 10/05/2018 To: 11/05/2018  
 Drug Class: Methadone      Name/Brand: Methadone 1mg/1ml oral soln (100ml) ROSEMONT      Strength: 1mg/1ml      Form: oral soln

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 / patient's rep? (Yes / No)	Was proof of identity of person collecting provided (Yes / No)	Quantity Supplied	Balance	Notes
10/05/2018 17:06 CDR ID: 164 Pack Size: 100 ml Name: Toby MacElroy Role: Pharmacist RegNo: 6D6198			HOLLAND, Clare Susan (Miss) 77 Nightington Avenue Kings Langley Hertfordshire WD4 5DR	BROWNFIELD, MON KINGS LANGLEY SURGERY KINGS LANGLEY SURGERY THE NAP KINGS LANGLEY HERTFORDSHIR E WD4 8ET RegNo: G9311154	Patient: HOLLAND, Clare Susan (Miss) 77 Nightington Avenue Kings Langley Hertfordshire WD4 5DR	Yes	Yes	10.00	1,984.00	Serial Number: ADDED: 10-05-18 15:51:35.73 Instalment 1 of 12 Known To Pharmacist ID: Driving license

100 %

## Revision History

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

Not to be reproduced or copied without the consent of AAH Pharmaceuticals Limited 2019.

### Contact us

For more information contact:  
**Telephone: 0344 209 2601**