

# Partially Collecting a Non-Daily CD SDM Instalment on a Later Day



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

You may encounter a scenario where as patient has been prescribed a controlled drug (CD) on an Addict (MDA) SDM prescription to be collected as non-daily instalments but misses a collection day. For example, the patient is due to collect instalments on Mondays and Thursdays, but fails to collect the Monday instalment and turns up on Tuesday instead.

In these instances, the pharmacy must still legally supply the remaining instalments and deduct the missed daily dose from the supply. ProScript Connect allows you to partially collect SDM instalments on a later day, and will automatically deduct the instalment quantity that has been missed.

You may have already [dispensed the full instalment](#), or you may have only [partially dispensed the instalment](#) if you were already aware they had missed their collection day. In either scenario, the process of partially collecting a non-daily CD SDM instalment on a later day remains the same.

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.

[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	Only if status is changed to Dispersed	✓
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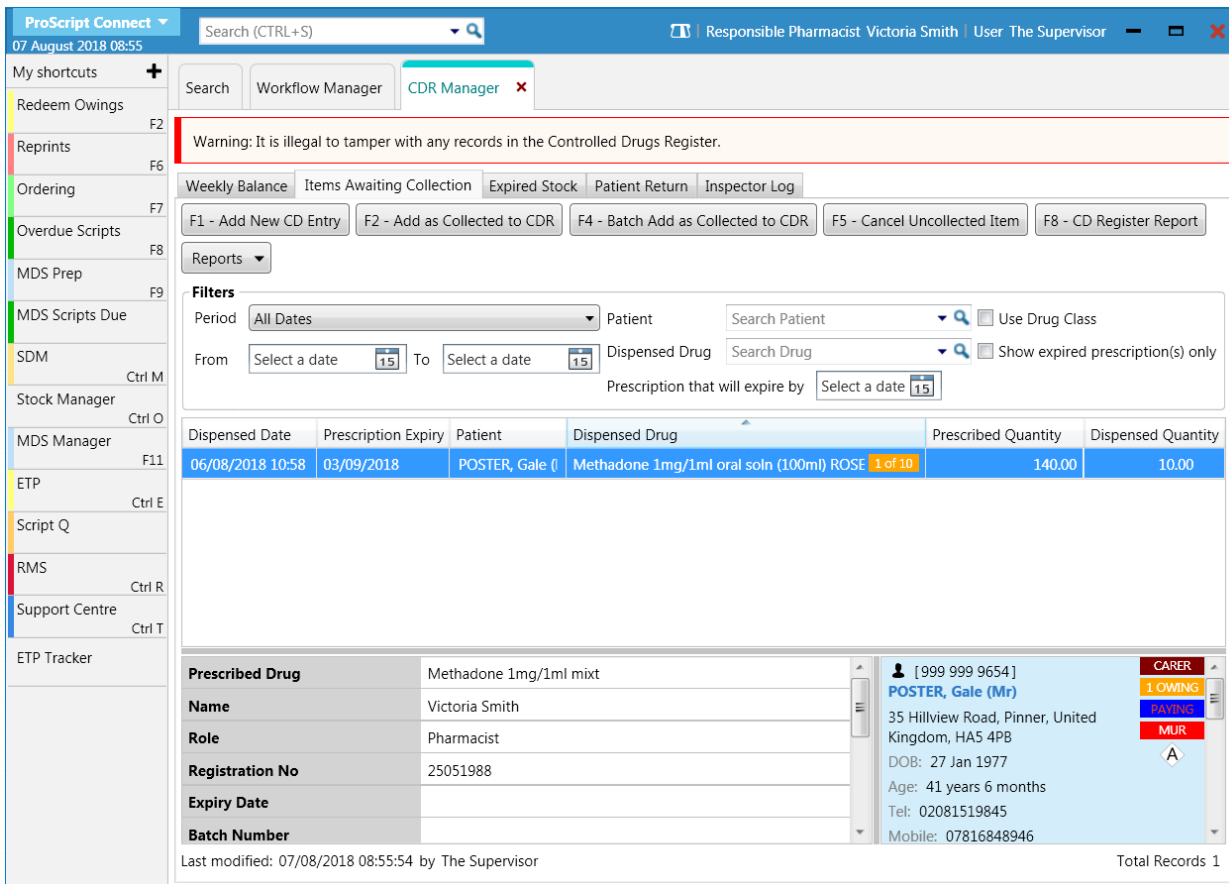
## Locating the SDM Instalment

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

- 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.
- 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.

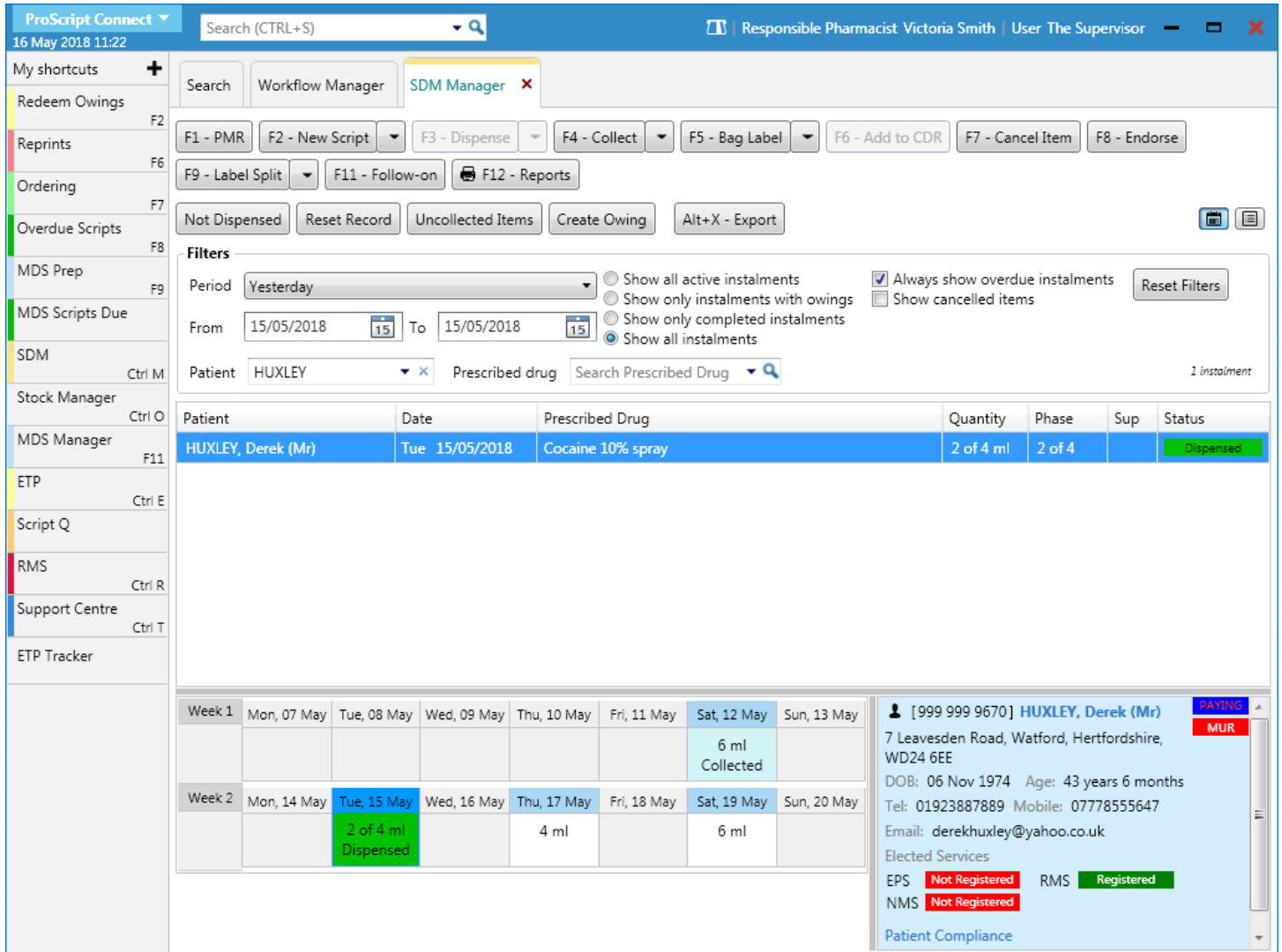
You can easily identify the SDM/ID instalments that are awaiting collection by using the orange **X of Y** tags that display within the *Dispersed Drug* column.



The screenshot shows the ProScript Connect interface with the CDR Manager open. A warning message is displayed at the top: "Warning: It is illegal to tamper with any records in the Controlled Drugs Register." Below this, there are navigation tabs: Weekly Balance, Items Awaiting Collection (selected), Expired Stock, Patient Return, and Inspector Log. A toolbar contains buttons for F1-F8 functions. A filters section allows searching by patient and drug. The main table lists items awaiting collection, with one item highlighted in blue: Methadone 1mg/1ml oral soln (100ml) ROSE, with a prescribed quantity of 140.00 and a dispensed quantity of 10.00. An orange tag "1 of 10" is visible in the Dispersed Drug column. A patient information panel at the bottom right shows details for Gale (Mr) POSTER, including his address, DOB, age, and contact information. A status indicator shows "1 OWNING" in an orange box.

### 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.



ProScript Connect 16 May 2018 11:22 Search (CTRL+S) Responsible Pharmacist Victoria Smith User The Supervisor

My shortcuts + Redeem Owings F2 Reprints F6 Ordering F7 Overdue Scripts F8 MDS Prep F9 MDS Scripts Due SDM Ctrl M Stock Manager Ctrl O MDS Manager F11 ETP Ctrl E Script Q RMS Ctrl R Support Centre Ctrl T ETP Tracker

Search Workflow Manager **SDM Manager** X

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: Yesterday  Show all active instalments  Always show overdue instalments  Show cancelled items  Show only instalments with owings  Show only completed instalments  Show all instalments

From: 15/05/2018 To: 15/05/2018

Patient: HUXLEY Prescribed drug: Search Prescribed Drug 1 instalment

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
HUXLEY, Derek (Mr)	Tue 15/05/2018	Cocaine 10% spray	2 of 4 ml	2 of 4		Dispensed

Week 1: Mon, 07 May Tue, 08 May Wed, 09 May Thu, 10 May Fri, 11 May Sat, 12 May Sun, 13 May

Week 2: Mon, 14 May Tue, 15 May Wed, 16 May Thu, 17 May Fri, 18 May Sat, 19 May Sun, 20 May

[999 999 9670] HUXLEY, Derek (Mr) **PAYING** **MUR**

7 Leavesden Road, Watford, Hertfordshire, WD24 6EE

DOB: 06 Nov 1974 Age: 43 years 6 months

Tel: 01923887889 Mobile: 07778555647

Email: derekhuxley@yahoo.co.uk

Elected Services

EPS **Not Registered** RMS **Registered**

NMS **Not Registered**

Patient Compliance

## Confirming the Collection Details

1. The Confirm Collection window displays. The *Collected On* date defaults to the date the originally collection was due. Select the current week date from the drop-down menu. A note displays in red to advise the collection quantity has been updated.
2. Select the *Pharmacist* if required, confirm the collection and drug details and select the **[F10 – Collect]** button.

Confirm Collection

Schedule							
Week 1	Mon, 07 May	Tue, 08 May	Wed, 09 May	Thu, 10 May	Fri, 11 May	Sat, 12 May	Sun, 13 May
						6 ml Collected	
Week 2	Mon, 14 May	Tue, 15 May	Wed, 16 May	Thu, 17 May	Fri, 18 May	Sat, 19 May	Sun, 20 May
		2 of 4 ml Dispensed		4 ml		6 ml	

**Instalment**

Pharmacist Ryan Peterson - RegNo: 891002

Collected On   Quantity  The quantity has been updated based on missed doses & the date of collection.

Dispensed Item Cocaine 10% spray (2.50ml) MARTINDALE

**Prescriber Details**

LEVISION, WB

CALLOWLAND SURGERY  
THE CALLOWLAND SURGERY 141A LEAVESDEN RO/  
WATFORD  
HERTFORDSHIRE  
WD24 5DG

**Patient Details**

[999 999 9670] HUXLEY, Derek (Mr) PAYING  
MUR

7 Leavesden Road, Watford, Hertfordshire,  
WD24 6EE

DOB: 06 Nov 1974  
Age: 43 years 6 months  
Tel: 01923887889 Mobile: 07778555647  
Email: derekhuxley@yahoo.co.uk

**Elected Services**

EPS Not Registered RMS Registered

NMS Not Registered

**Patient Compliance**

Patient Id: 9

## 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: \* HUXLEY, Derek (Mr)

Patient Address: \* 7 Leavesden Road  
Watford  
Hertfordshire  
WD24 6EE

**Dispensing and prescriber details**

Prescribed Drug \* Cocaine 10% spray i

Dispensed Drug \* Cocaine 10% spray (2.50ml) MARTINDALE i

Dispensed quantity \* 2.00  
(Total Unit(s))

Prescriber Name \* LEVISON, WB  
CALLOWLAND SURGERY Search Prescriber

**Dispenser Details**

Name \* Ryan Peterson ▼ Role \* Pharmacist ▼ Registration No \* 891002

Date \* 16/05/2018 15 Time \* 11 : 12

**Current CDR Stock Balance**

CDR Balance Pack(s) 47 Units 1.50 Total Units 119.00

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

**Collection Details**

Collected Collection Date 16/05/2018 ▼ Collection Time 12 : 09  Supervised

Known to Pharmacist  ID Requested  ID Supplied ID Type Passport ▼

Collected by Patient Representative  Collected by Health Care Professional


Name  Relationship


Address

CDR Balance adjustment
✓ F10 - Save to CD Register
✗ Cancel

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. The <i>Dispensed quantity</i> will reflect the partial quantity you are marking as collected.

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 or 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>

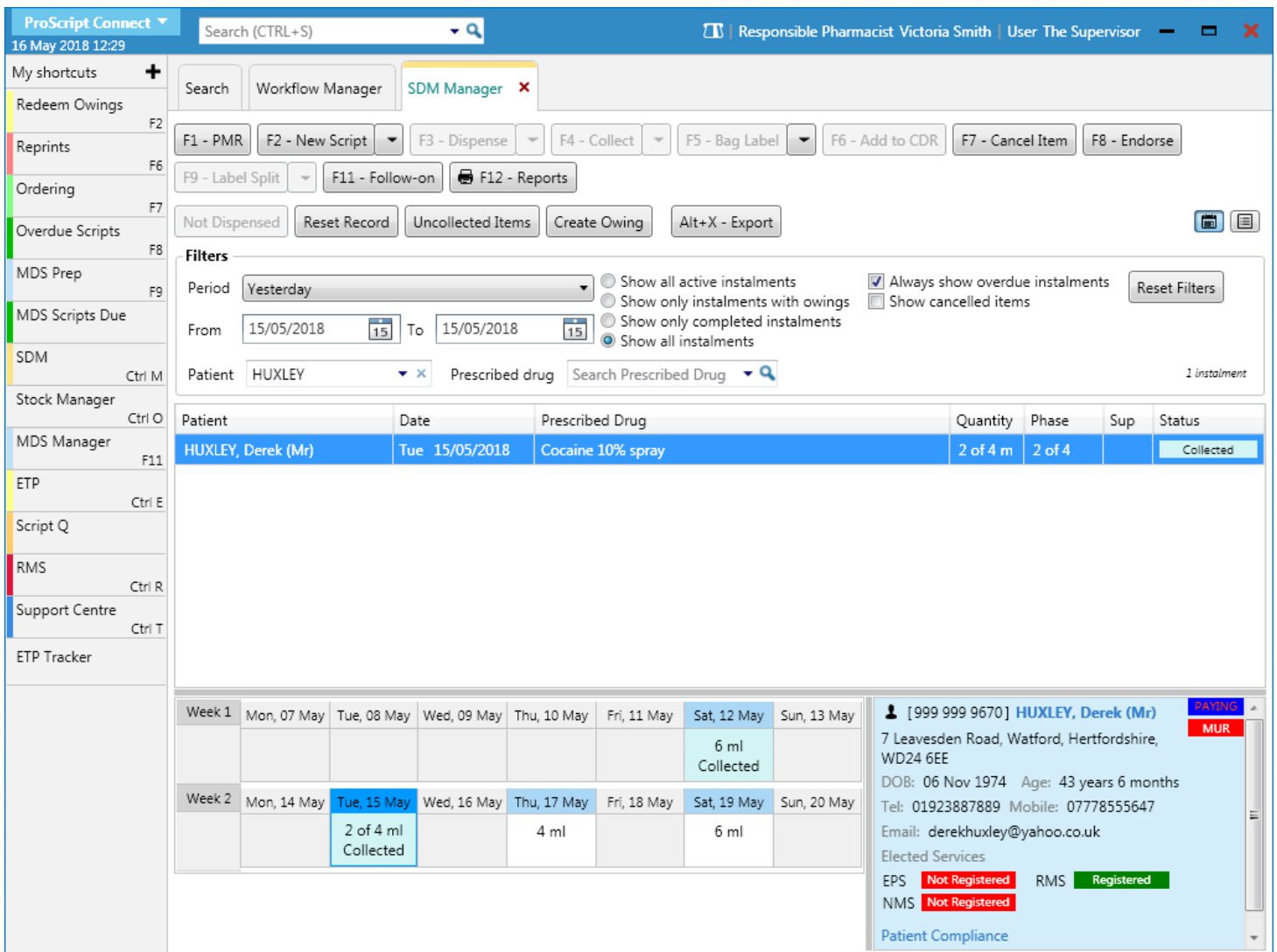
 If there is no CDR balance available for the item and you attempt to save the entry as *Collected*, the system will advise that you will not be able to do this, and will highlight the item's current CDR balance. You can adjust the CDR balance from the CDR Dispensed Goods form by clicking **[CDR Balance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

 If you do adjust the CDR balance, an alert may appear 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.
2. 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

3. An entry will be written to the CD Register Report.



**ProScript Connect** | 16 May 2018 12:29 | Search (CTRL+S) | Responsible Pharmacist Victoria Smith | User The Supervisor

**SDM Manager**

Filters:

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

From: 15/05/2018 | To: 15/05/2018

Patient: HUXLEY | Prescribed drug: Cocaine 10% spray | 1 instalment

Patient	Date	Prescribed Drug	Quantity	Phase	Sup	Status
HUXLEY, Derek (Mr)	Tue 15/05/2018	Cocaine 10% spray	2 of 4 m	2 of 4		Collected

Week 1: Mon, 07 May | Tue, 08 May | Wed, 09 May | Thu, 10 May | Fri, 11 May | Sat, 12 May | Sun, 13 May

Week 2: Mon, 14 May | Tue, 15 May | Wed, 16 May | Thu, 17 May | Fri, 18 May | Sat, 19 May | Sun, 20 May

Week 2 details: Tue, 15 May: 2 of 4 ml Collected; Thu, 17 May: 4 ml; Sat, 19 May: 6 ml

**Patient Compliance Summary:**

[999 999 9670] HUXLEY, Derek (Mr) | **PAYING** | **MUR**

7 Leavesden Road, Watford, Hertfordshire, WD24 6EE

DOB: 06 Nov 1974 | Age: 43 years 6 months

Tel: 01923887889 | Mobile: 07778555647


Email: derekhuxley@yahoo.co.uk


Elected Services

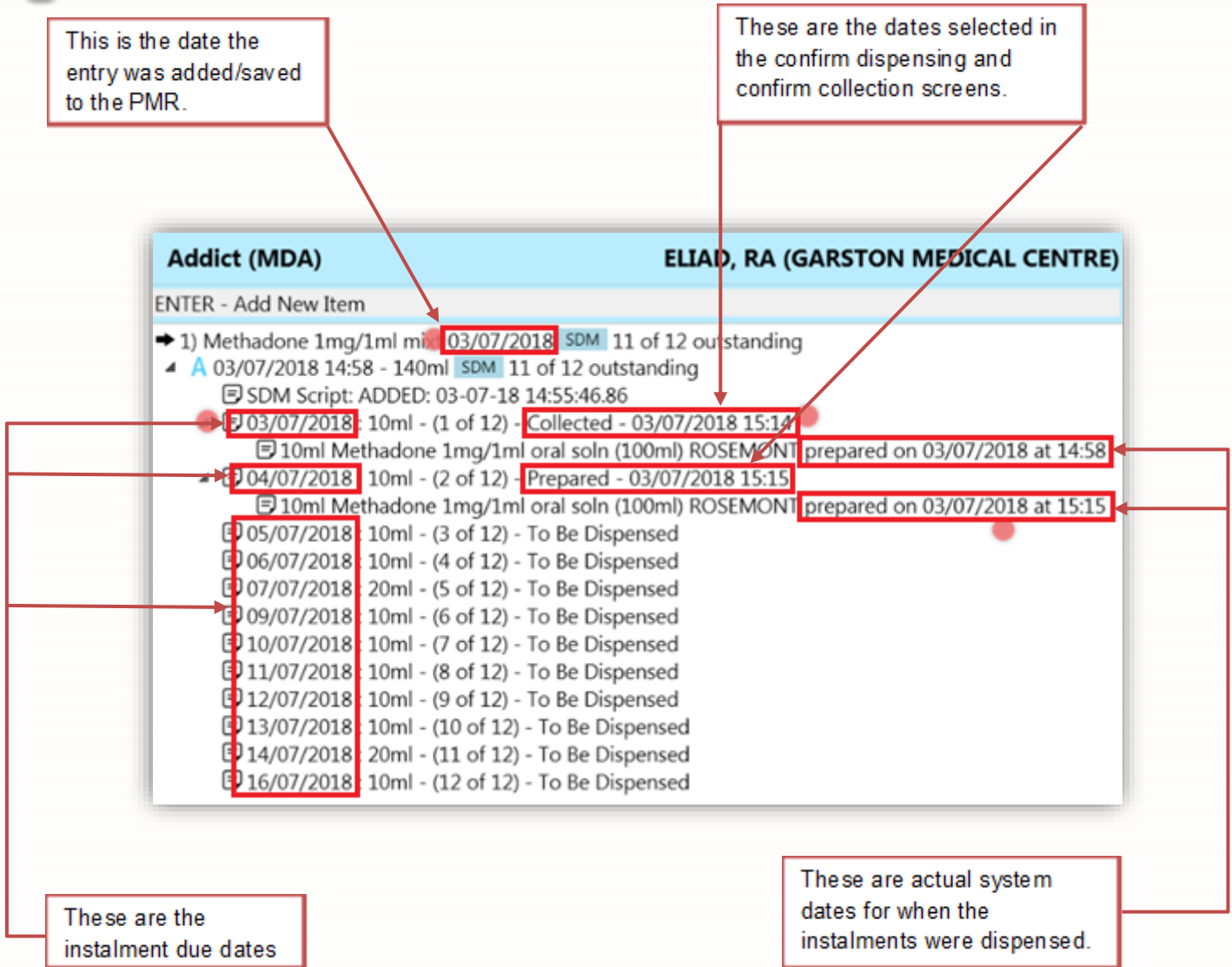
EPS: **Not Registered** | RMS: **Registered**

NMS: **Not Registered**

Patient Compliance

 The SDM schedule that appears in the SDM Manager will show the partial quantity that has been collected against the instalment due date. To see the date of the collection events as provided in the Confirm Collection window, you will need to access the PMR and expand the tree view.

 See the image below to see more information about each date.



**Addict (MDA) ELIAD, RA (GARSTON MEDICAL CENTRE)**

ENTER - Add New Item

- 1) Methadone 1mg/1ml ml 03/07/2018 SDM 11 of 12 outstanding
- ▲ A 03/07/2018 14:58 - 140ml SDM 11 of 12 outstanding
  - ☑ SDM Script: ADDED: 03-07-18 14:55:46.86
  - ☑ 03/07/2018 10ml - (1 of 12) - Collected - 03/07/2018 15:14
  - ☑ 10ml Methadone 1mg/1ml oral soln (100ml) ROSEMONT prepared on 03/07/2018 at 14:58
  - ☑ 04/07/2018 10ml - (2 of 12) - Prepared - 03/07/2018 15:15
  - ☑ 10ml Methadone 1mg/1ml oral soln (100ml) ROSEMONT prepared on 03/07/2018 at 15:15
  - ☑ 05/07/2018 10ml - (3 of 12) - To Be Dispensed
  - ☑ 06/07/2018 10ml - (4 of 12) - To Be Dispensed
  - ☑ 07/07/2018 20ml - (5 of 12) - To Be Dispensed
  - ☑ 09/07/2018 10ml - (6 of 12) - To Be Dispensed
  - ☑ 10/07/2018 10ml - (7 of 12) - To Be Dispensed
  - ☑ 11/07/2018 10ml - (8 of 12) - To Be Dispensed
  - ☑ 12/07/2018 10ml - (9 of 12) - To Be Dispensed
  - ☑ 13/07/2018 10ml - (10 of 12) - To Be Dispensed
  - ☑ 14/07/2018 20ml - (11 of 12) - To Be Dispensed
  - ☑ 16/07/2018 10ml - (12 of 12) - To Be Dispensed

Callout boxes explain the highlighted dates:

- This is the date the entry was added/saved to the PMR.
- These are the dates selected in the confirm dispensing and confirm collection screens.
- These are actual system dates for when the instalments were dispensed.
- These are the instalment due dates

## 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: Cocaine      Name/Brand: Cocaine 10% spray (2.50ml) MARTINDALE      Strength: 10%      Form: spray

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
16/05/2018 12:09 CDR ID: 227 Pack Size: 2.50 ml Name: Ryan Peterson Role: Pharmacist RegNo: 891002			HUXLEY, Derek (Mr) 7 Leavesden Road Watford Hertfordshire WD24 6EE	LEVISON, WB CALLOWLAND SURGERY THE CALLOWLAND SURGERY 141A LEAVESDEN ROAD WATFORD HERTFORDSHIRE WD24 5DG RegNo: G8601416	Patient: HUXLEY, Derek (Mr) 7 Leavesden Road Watford Hertfordshire WD24 6EE	Yes	Yes	2.00	117.00	Partial collection Serial Number: ADDED: 16-05-18 11:05:00.40 Instalment 2 of 4 Known To Pharmacist ID: Passport

100 %

## Revision History

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

## Contact us

For more information contact:  
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