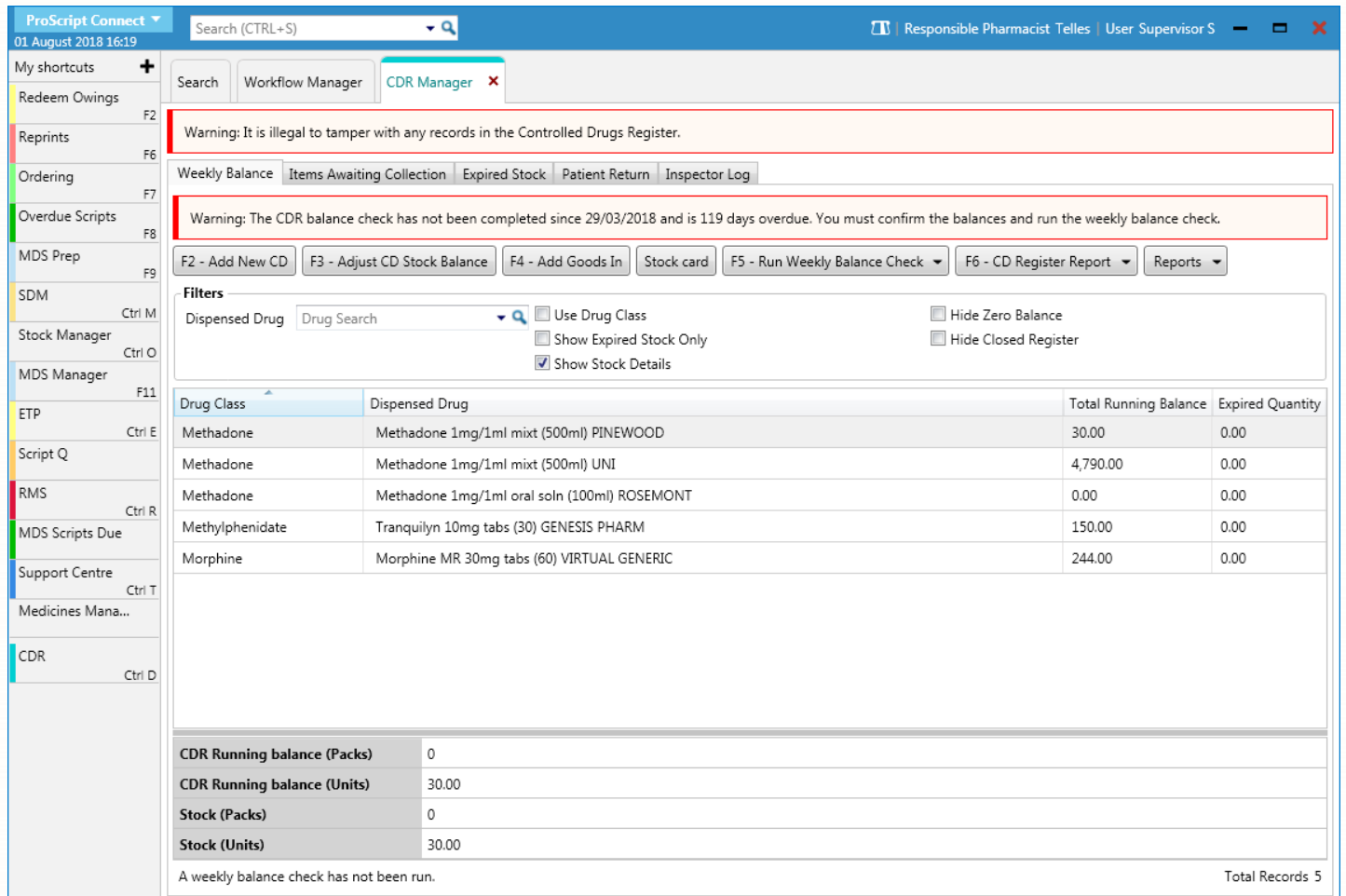


## Running a Weekly Balance Check

We recommend running the balance check once a week. This will confirm that the total CDR running balance for each item is correct, and will make an entry to the CD Register against each drug. By default, ProScript Connect will prompt you every 7 days to carry out a balance check based on the date of the last balance check. This will be displayed as a warning bar within the CDR Manager and can be configured within Edit Application Settings.




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, another warning states: "Warning: The CDR balance check has not been completed since 29/03/2018 and is 119 days overdue. You must confirm the balances and run the weekly balance check." The interface includes a navigation menu on the left with shortcuts for various functions. The main area displays a table of drug stock balances with columns for Drug Class, Dispensed Drug, Total Running Balance, and Expired Quantity. Below the table, there is a summary section showing CDR Running balance (Packs) and CDR Running balance (Units), both at 0 and 30.00 respectively. A note at the bottom indicates that a weekly balance check has not been run.

Drug Class	Dispensed Drug	Total Running Balance	Expired Quantity
Methadone	Methadone 1mg/1ml mixt (500ml) PINEWOOD	30.00	0.00
Methadone	Methadone 1mg/1ml mixt (500ml) UNI	4,790.00	0.00
Methadone	Methadone 1mg/1ml oral soln (100ml) ROSEMONT	0.00	0.00
Methylphenidate	Tranquilyn 10mg tabs (30) GENESIS PHARM	150.00	0.00
Morphine	Morphine MR 30mg tabs (60) VIRTUAL GENERIC	244.00	0.00

CDR Running balance (Packs)	0
CDR Running balance (Units)	30.00
Stock (Packs)	0
Stock (Units)	30.00

A weekly balance check has not been run. Total Records 5

 Your CD stock balance should be checked and counted prior to running the weekly balance check. You can print a Stock Balance report to assist you.

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, select the **[F5 – Run Weekly Balance Check]** button. The Run Weekly Balance window displays.



You can run a balance check for selected items by highlighting the item(s) in the grid and clicking the arrow on the **[F5 – Run Weekly Balance Check]** button and selecting the *Alt+F5 – Balance Check for Selected Items* menu item.

Run Weekly Balance
— □ ×

When running the weekly balance check, you are confirming that the total running CDR balance for each drug is correct. An entry will be made to the CD Register against each drug.

Do you wish to proceed with confirming the weekly balance?

User Name \*

Role \*

Registration No \*

- The signed-in user name and their role are populated by default if configured, but you may have to manually enter the registration number. Check the details are correct and select the **[F10 – Confirm Weekly Balance]** button.

## CD Register Entry

Running a weekly balance check 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 total running *Balance* after the event
- Notes* describing the event, in this case a *Weekly Balance Check*

Report Preview
— □ ×

CD Register

From: 18/07/2018 To: 18/07/2018  
 Drug Class: Oxycodone    Name/Brand: Oxycodone MR 10mg tabs (56) UNI    Strength: 10mg    Form: tabs

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's rep? (Yes / No)			Was proof of identity of person collecting provided (Yes / No)
18/07/2018 12:12 CDR ID: 564 Pack Size: 56 tablets Name: Ryan Peterson Role: Pharmacist RegNo: 2012345								112.00	Weekly Balance Check

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## Revision History

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

### Contact us

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