ECDR Manual Documentation

Release 2.14

Microlink PC Medical

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Contact Details

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- Contact Details
    - Sales
    - Support
    - Website

These are important contact details that you should keep at hand.

1.1 Sales

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01245 492 986

1.2 Support

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02380 240 340

medical@microlinkpc.com

1.3 Website

http://controlled-drugs.co.uk/

License

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- License

  - Term
  - Limitations of Liability
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  - General
  - Administrator responsibilities

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2.4 General

This Agreement will be governed by the laws of the United Kingdom, and you agree that any claims regarding the software shall be brought in the UK.

2.5 Administrator responsibilities

The software administrator will be responsible for maintaining backups of the system on removable and paper media. Denward Manufacturing Ltd. and Microlink PC Medical take no responsibility from loss of data due to failure to backup.

Installation

Contents

- Installation
    - Running the installer
    - The installation wizard

The installation procedure involves a standard installer, and should be familiar to anyone having installed software before.

3.1 Running the installer

Firstly, enter the CDROM in the CDROM drive of the computer, and click the icon for the drive in Windows Explorer.

Click the icon ecdr_install.exe (numbered with the version of the software you are installing).

3.2 The installation wizard

The installation wizard will guide you through the installation.

- Click *next* to commence the installation

- Read the license carefully, and agree to continue the installation

- Enter the location you would like to install the application. The default location is preferred, and will be presented by the installer

- Select the name of the program group for the start menu. The default location is preferred, and will be presented by the installer

- You will then be asked whether you want to create an icon on the desktop. To place an icon on the desktop tick the box labelled *create a desktop icon*

- The installer is now ready to commence installation

- Click the *install* button or back to change settings

- The installer will install the application

- Once completed, the installer will present a dialogue to confirm this

- The application can optionally be launched at this stage by ticking the box labelled *launch Controlled Drug Register*.

Getting Started

Contents

How to get started with the Electronic Controlled Drug Register. This chapter includes setting up the pharmacy and logging in to the application for the first time.

4.1 Setting up the Pharmacy

On first use of the application, the administrator will be prompted to enter the pharmacy details. These should be entered carefully, as they can only be entered once and are not changeable afterwards.

Once entered, the *ok* button should be clicked, and the application will start as normal, and the user will be prompted to log in.

4.2 Logging In

In order to log in, the user will be presented with a login dialogue:

Enter login details, and click the *ok* button.

The initial account is setup for the administrator, with:

Username:	admin
Password:	admin

You have 3 attempts to log in before the application exits.

Pressing the *cancel* button will exit the application.

The administrator MUST change their password when first logging in to the system. This is a feature of security.

4.3 Changing Passwords

For full information on changing passwords, see User Management.
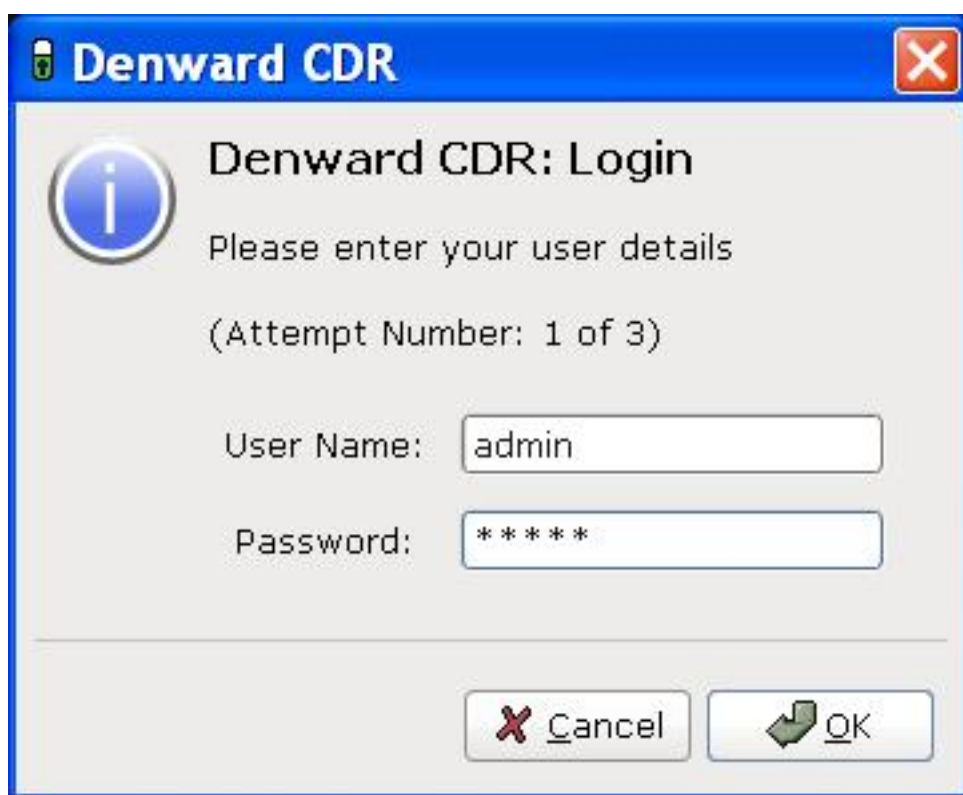
Administrator Responsibilities

The software administrator will be responsible for maintaining backups of the system on removable and paper media.

Denward Manufacturing Ltd. and Microlink PC Medical take no responsibility from loss of data due to failure to backup.

5.1 Closing the software

The administrator must ensure the software is closed at the end of each working day.

5.2 Backing Up

The administrator is responsible for ensuring that regular backups are made onto removable media, such as USB Drive, or CDROM.

In the event of hardware failure, such as hard-drive failure, the Electronic Controlled Drug Register will be able to restore itself from backup.

The use of regular backups to a safe location will ensure that the data can never be lost.

5.3 Passwords

The administrator and all newly added users must change their password on first logging into the system.

> **Warning:** Keeping the default password is a security hazard.

5.4 Printing Reports

The administrator is responsible for printing and maintaining regular printed reports of the data using the report printing functionality of the application.

5.5 Tampering With Software

The application must not be tampered with in any way. No files in the application directory should be edited, moved or deleted. Doing this may result in permanent loss of data.

5.6 Training

All users of the application must undergo training in order to have the competence to use it. This training should at the minimum include reading this manual.

5.7 Online Updates

The online updater can be found in the backup/archive tab. You can choose to check manually daily for new updates or sign up for the optional newsletter that will inform you of new updates and any new features that have been added to the software.

5.8 Newsletters

If you prefer to download and install updates yourself, the Electronic Controlled Drug Register newsletter will inform you of any new update, all the latest features and news.

5.9 After Sales

This operation is only to be done after purchase of the software has been completed.

To generate a key:

- Click the *backup / archive* tab
- Click the *generate passport* button
- A window will appear with a long letter and number passport key
- Copy and paste the whole key that appears in the new window into an email
- Email to medical@microlinkpc.com

To enter an activation key:

- Click the *backup / archive* tab
- Select the *enter key* button
- Now copy and paste the key that has been sent to you from Microlink PC Medical (including = signs) into the blank field in the *enter key* window
- Click *ok* and the key should be saved

Note: This can be a very tricky process and if you come across any problems we strongly encourage you to phone our technical support team.

Manual Stock Entry

Contents

- Manual Stock Entry

The Electronic Controlled Drug Register allows you to manually enter current stock details when initially installing the application. It should be noted that this can only be done once, and is an irreversible action. This is to ensure reliability of data in the system.

It is expected that the administrator will enter the manual items on first using the application, and once the stock has been aligned, the Electronic Controlled Drug Register will be responsible for calculations of stock and generation of reports.

Note: You can only enter the existing stock once. Make sure you have all the information at hand before you start.

- Select the tab labelled *Manual Entry*

- Click the *start manual entry* button

- Enter the value for each drug in the table by clicking the value and editing it in place

- Once completed, click the *finish manual entry* button.

You will be presented with a confirmation dialogue to confirm whether you really want to exit.

The stock recorded in the Electronic Controlled Drugs Register will now reflect the current stock in the pharmacy and the manual entry function will become permanently inactive.

The Register

Contents

- The Register

    - Viewing a Drugs Register
    - Printing a Drugs Register
    - Saving a Drugs Register
    - Creating an inspection

A register can be viewed and printed for each drug showing all activity, and a running balance.

7.1 Viewing a Drugs Register

To view the register for a drug:

- Click the *register* tab

- Enter the drug name into *drug name* OR

- Select a drug name from the drug name drop down

- Select the correct dosage and formulation of the drug from the drug list

- Click *open drug in a new window*

- The register will appear in a separate window

7.2 Printing a Drugs Register

To print a drugs register:

- View a drug register (as above)

- Click the *print this register* button

- Select the dates you wish to print in the date chooser and click *ok*

- Confirm the print dialogue and your register will be printed

7.3 Saving a Drugs Register

To save a drugs register:
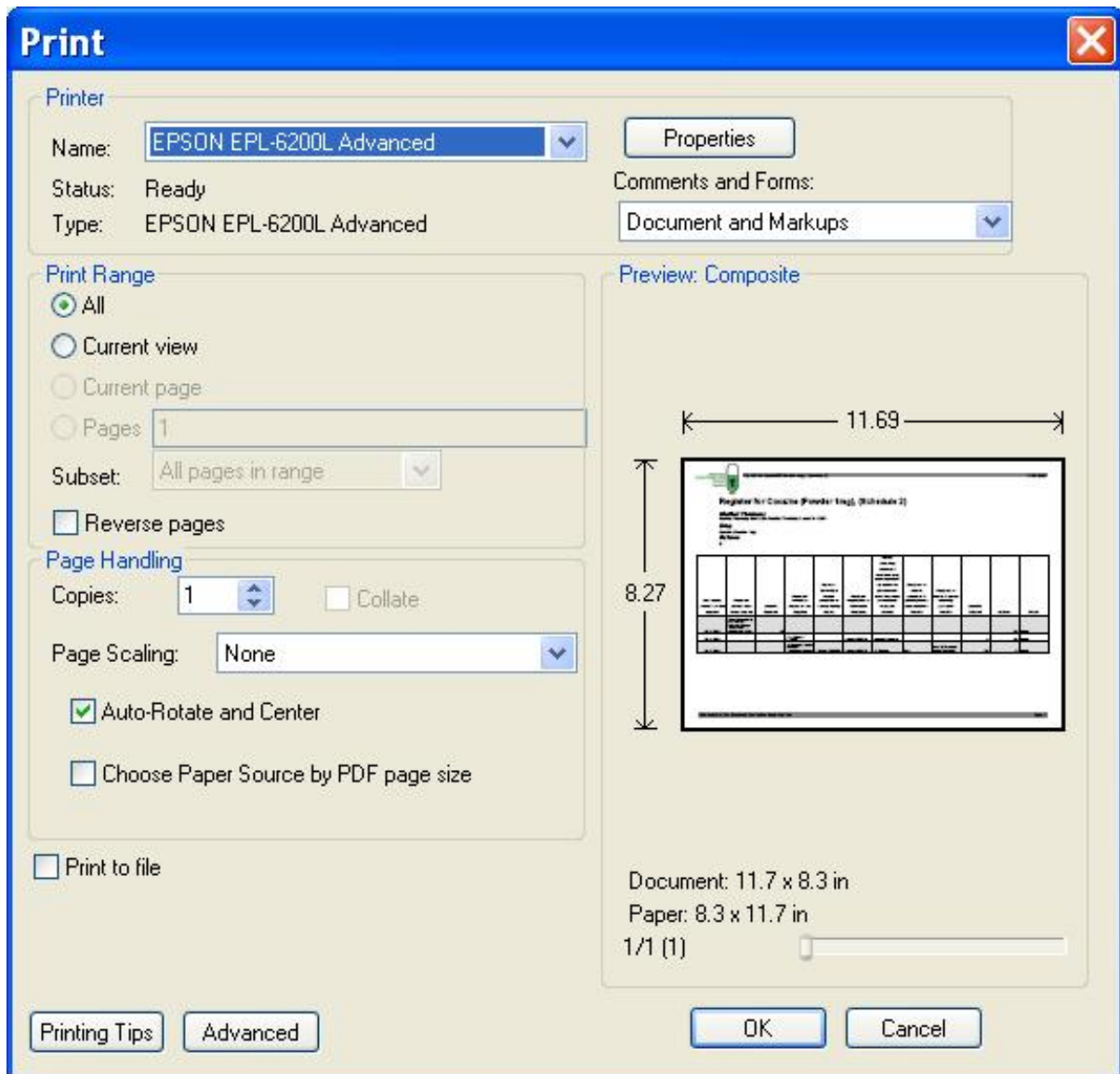
- Open the drug in a new window

- Click the *save this register* button

- Enter your required dates into the date chooser

- The file save dialogue will appear

- Enter the name you wish to call your saved report

- Click the *save* button.

This register is now saved to your hard drive.

7.4 Creating an inspection

To create an inspection:

- View a drug (as above)

- Click the words *inspection details* in the bottom left of the new window

- The inspection log will open

- Enter inspector name, ID and any notes into the relevant fields

- Click the *add inspection* button
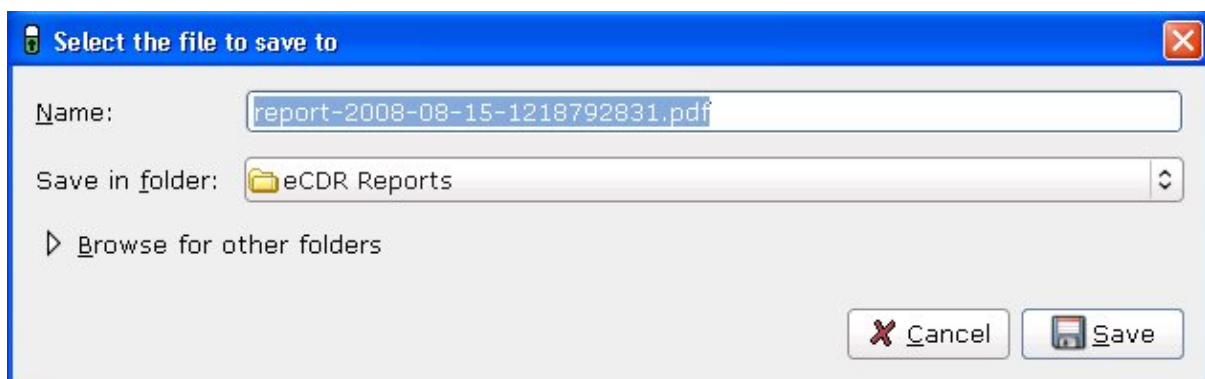
The inspection is now saved to the log.

Inspectors can also print, preview and save drugs registers. For instructions see above.

After an inspector has added all the drug inspections, the Electronic Controlled Drugs Register suggests creating a new backup. For instruction on how to backup, please see the System Backup section of this manual.

Stock Management

The Electronic Controlled Drug Register records all changes in stock for controlled drugs. Items should be entered into the register when stock is received into the pharmacy, and transferred out of the pharmacy. Additionally, the software records stock takes for these drugs.

8.1 Viewing Stock

To view the stock:

- First select the *stock* tab

- Followed by the tab labelled *current stock*

All the stock will be visible.

To narrow down the items that are displayed, either type a drug name into the entry labelled *drug name*, or select a drug from the drop down box.

You can also print, preview and save your stock.

To print:

- Select the drug you wish to print a report for

- Choose the dates between which you wish to print

- Click the *print report* button

- Accept the print dialogue.

To preview:

Click the *preview* button and a report preview will be generated.

To save:

- Click the *save report* button

- Choose what report(s) you want to save and press *ok*

- Select where you want to save your report and what you want to call it

- Press the *save* button.

8.2 Receiving Stock

You must ensure that you have added one or more suppliers before you receive stock.

To access the stock receiving functions:

- First select the *stock* tab

- Followed by the *receive stock* tab

- Select the drug to receive. Either type the name into the entry labelled *drug name*, or select a drug name in the drop down box

- Once the drug name is selected, select the correct preparation and dose of the drug from the available dosages and preparations listed below

- If the drug has been received from a supplier, select the supplier in the list labelled *name and address from whom received* and the invoice number for the receipt. Otherwise, for internal transfers between branches, select the check box labelled *internal transfer* and the branch from which the drug was received

- Enter the quantity received in the entry labelled *quantity received*, and the date which it was received (which is defaulted to the current date) in the entry labelled *date received*

- Click on the *save* button.

You have now successfully added stock to the Electronic Controlled Drug Register.

You may clear the entered data at any time by pressing the *clear* button.

8.3 External Transfers

Transfers of drugs may be made between branches of a pharmacy.

To access the External Transfer functions:

- First select the *stock* tab

- Then select the *external transfer* tab

- Select the drug to transfer. Either type the name into the entry labelled *drug name*, or select a drug name in the drop down box

- Once the drug name is selected, select the correct preparation and dose of the drug from the available dosages and preparations listed below in the drug list

- Enter the details in the entries labelled *signed order date*, *signed order by*, and *signed order profession* of the signed order covering the transfer

- Enter the quantity in the *quantity supplied* entry

- Enter the date of the transfer in the *date transferred* entry

- Enter the target of the transfer in the entry labelled *name and address of person or firm supplied*

- Click the *save* button.

You have now successfully transferred stock out of the pharmacy in the Electronic Controlled Drug Register.

You can clear the details at any time by clicking the *clear form* button.

8.4 Stock Taking

To access the stock taking functions:

- First select the *stock* tab

- Then select the tab labelled *stock take*.
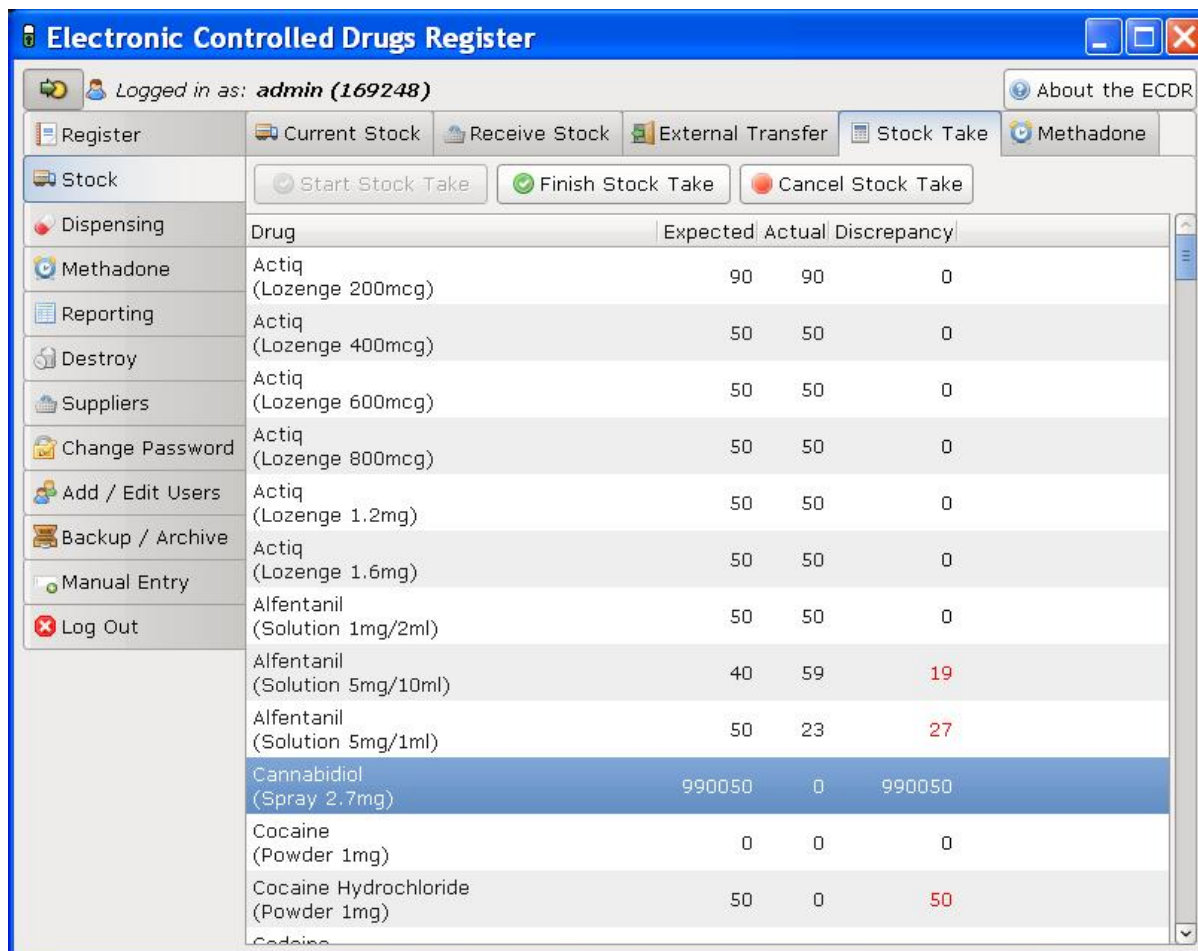
- Click the *start stock take* button. The list of drugs, the expected stock, the actual stock, and the discrepancy is listed.

- For each drug, enter the actual stock in the *actual* column. Values are edited by double-clicking them.

- When the stock-take is completed, click the *finish stock take* button. The stock take will be added to the system.

A stock take may be cancelled at any time by clicking the *cancel stock take* button. You will lose all the data entered for that stock take.

Note: Stock takes can be made easier by printing out the current stock list before hand and then entering all the data at once. Instructions for printing current stock lists can be found in the viewing stock section.

8.5 Daily Methadone Stock Overages and Underages

In case of overages and underages in Methadone dispensing, the Electronic Controlled Drug Register has the facility to modify the stock levels of Methadone mixture. When this alteration takes place, there is an entry made in the register which can be reviewed later by inspectors.

To compose a daily Methadone stock take:

- Click the *daily methadone stock* tab.

- Select the form of Methadone you wish to record in the form scroll down

- Select the date you wish to make a record of

- Enter the quantity of Methadone you have in stock

- Click *save* to store the details you have entered

If your quantity of stock differs from the expected stock you will be asked to enter a reason for the discrepancy. Usually this will be an "underage" or and "overage". The expected stock will change to show the amount you have declared.

You can clear the entered data at any time by pressing the *clear* button.

Dispensing

Contents

- Dispensing

    - Patient Details
    - Prescriber Details
    - Drug Details
    - Dispensing Details
    - Collection Details
    - Completing Dispensing

To access the dispensing page, select the *dispensing* tab.

Dispensing is divided into 5 sets of information for entry. These are:

- Patient details,

- Prescriber details,

- Drug details,

- Dispensing details,

- Collection details.

9.1 Patient Details

Firstly you will need to choose a patient to dispense to.

The patient should be selected from the list. A name can be searched for by entering the name in the *search* entry.

If the patient is not present in the system, the patient must be added.

To add a patient:

- Click the *new patient* button

- Enter the patient details in the patient editor dialogue

- Click the *ok* button to confirm.

The new patient is now added to the list. You can cancel adding a new patient at anytime by clicking the *cancel* button.

For security purposes, Patient cannot be edited, if details are changed a new profile must be made.

Once selected the patient details will appear in the dispensing details area.

9.2 Prescriber Details

Next you will have to choose a prescriber.

The prescriber should be selected from the list. A name can be searched for by entering the name in the *search* entry. Once selected, the prescriber will appear in the *dispensing details* area.

If the prescriber is not present in the system, the prescriber must be added.

To add a prescriber:

- Click the *new prescriber* button

- Enter the prescriber details in the prescriber editor

- Click the *ok* button to confirm

The new prescriber is now added to the list. You can cancel adding a prescriber at anytime by clicking the *cancel* button.

For security purposes, Prescribers cannot be edited, if details are changed a new profile must be made.

9.3 Drug Details

Now you will need to enter the drug details.

- Select the drug name from the drug selector drop down or enter part of the name, or the entire name in the drug selector drop down

- Select the form and dose of the drug from the drug list

- The selected drug will appear in the *dispensing details* field.

Step 3: Drug Details

Drug Name: Actiq

Name ⌄	Form	Strength	Stock
Actiq	Lozenge	200mcg	90
Actiq	Lozenge	400mcg	50
Actiq	Lozenge	600mcg	50
Actiq	Lozenge	800mcg	50
Actiq	Lozenge	1.2mg	50
Actiq	Lozenge	1.6mg	50

Step 4: Dispensing Details

Patient: **F. Godfree**

Selected Drug: **Actiq (Lozenge 600mcg)**

Prescriber: **F. Handle**

Date Supplied: 01/07/2008

Quantity Supplied: 10

☐ Private Prescription

9.4 Dispensing Details

The dispensing details contain a confirmation of the Patient, Prescriber and Drug selected in the previous stages. In addition the following must be entered:

- Enter the date in the *date supplied* box
- Enter the quantity of drug to dispense in the *quantity supplied* box.

If it is a private prescription you will need to click the *private prescription* check box.

9.5 Collection Details

If the patient collected the drug themselves:

- Ensure *person collecting* is set to *patient*

Record whether the identification is shown:

- Select *ID shown*
- Select the type of identification in *ID type* or
- Enter the type of identification manually.

If no identification is shown, and discretion is used:

- Select *discretion used*
- Enter the reason for using discretion.

If the patient is not collecting the prescription themselves:

- Ensure that *person collecting* is set to other
- Enter the name of the collecting person in the *name of person collecting*
- Complete steps above for identification.

9.6 Completing Dispensing

To complete the dispensing, click the *dispense drug* button.

To clear the form at any time, click the *clear form* button.

Scheduling

Contents

- Scheduling

  - Creating a Schedule
  - Dispensing a Scheduled drug
  - List Schedules

The Scheduling functions are specially designed for pharmacies with large amounts of Methadone patients. By creating a schedule for each patient you can save the time that would have been taken up entering the information into the dispensing section every day.

For all scheduling functions, select the *Scheduling* tab.

10.1 Creating a Schedule

To create a new schedule you should:

- Click the ** tab

- Select *New schedule*

- Enter the patient details or add a new patient

- Followed by the prescriber details (as for dispensing)

For security purposes, patients and prescribers cannot be edited, if details are changed a new profile must be made.

- Select the drug formulation from the drop down

- Choose the start date of the schedule. This is preset to today's date.

- Select the number of days (1-48) you wish to schedule for by sliding the bar right and left

For every day in the schedule, an item is added to the schedule list.

- You can set all items to a single dose by selecting the dose and clicking the set button or type each dose individually and press return

- Once you are satisfied, click the *save* button.

10.2 Dispensing a Scheduled drug

You can only dispense a scheduled drug if a schedule has already been created

To dispense a scheduled drug you should:

- Click the *scheduling* tab

- Select *dispense schedule*

- Enter the name of the patient in the patient search box

- The available dose for the current day will be shown

Note: On Fridays doses for both Saturday and Sunday will be shown and dispensable.

- Select required scheduled item

- Enter details for collection

- Followed by the details for identification

- Click the *save* button.

10.3 List Schedules

To view all schedules:

- Click the *list schedules* tab

- Select the *show all* button to list all schedules

To cancel schedules:

- Follow the instructions as above to view all schedules

- Select the schedule you wish to cancel

- Click the *cancel schedule* button

- A message asking you to confirm the cancellation will appear

- After confirming a tick will appear in the cancelled column

	Register		New Schedule		Dispense Scheduled Item		List Schedules	

Stock
Dispensing
Scheduling
Reporting
Destroy
Suppliers
Change Password
Add / Edit Users
Backup / Archive
Manual Entry
Log Out

Show All   Cancel Schedule

⌄ Created	Patient	Cancelled
17/02/2009	PATEL Oliver St. James Lane Winford	☐
17/02/2009	FREEMAN Lynda Road Town/City County	☐
17/02/2009	FREEMAN Lynda Road Town/City County	☐
17/02/2009	Davis George Road Town/City County	☐
17/02/2009	&THATCHER Maggie Road Town/City County	☐

Sat 28 Feb 2009	Sun 01 Mar 2009	Mon 02 Mar 2009
Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10
Tue 03 Mar 2009	Wed 04 Mar 2009	Thu 05 Mar 2009
Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10
Fri 06 Mar 2009	Sat 07 Mar 2009	Sun 08 Mar 2009
Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10	Cannabidiol (Spray 2.7mg) 10
Mon 09 Mar 2009		
Cannabidiol (Spray 2.7mg) 10		

Reporting

Contents

- Reporting
    - Viewing Reports
    - Previewing Reports
    - Printing Reports
    - Saving Reports
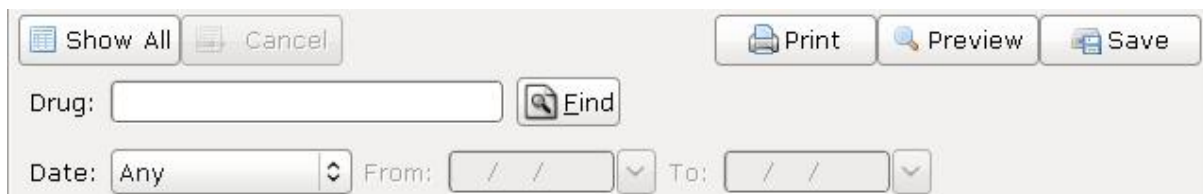
All reports can be viewed, and printed.

For all reporting functions, select the *reporting* tab.

11.1 Viewing Reports

To view reports click the *show all* button.

To ration down your search enter a drug name and/or date.

11.2 Previewing Reports

To preview a report simply click the *preview* button at the top of the reports page

11.3 Printing Reports

In order to print a report you should:

- Select the drug for which you wish to print a report

- Choose the dates between which you want to print

- Click the *print report* button

- Accept the print dialogue.

Note: Printing large reports is liable to take a long time.

11.4 Saving Reports

To save your report to your computer before backing up:

- Click the *save report* button
- Choose what report(s) you want to save and press *ok*

- Select where you want to save your report and what you want to call it
- Press the *save* button.
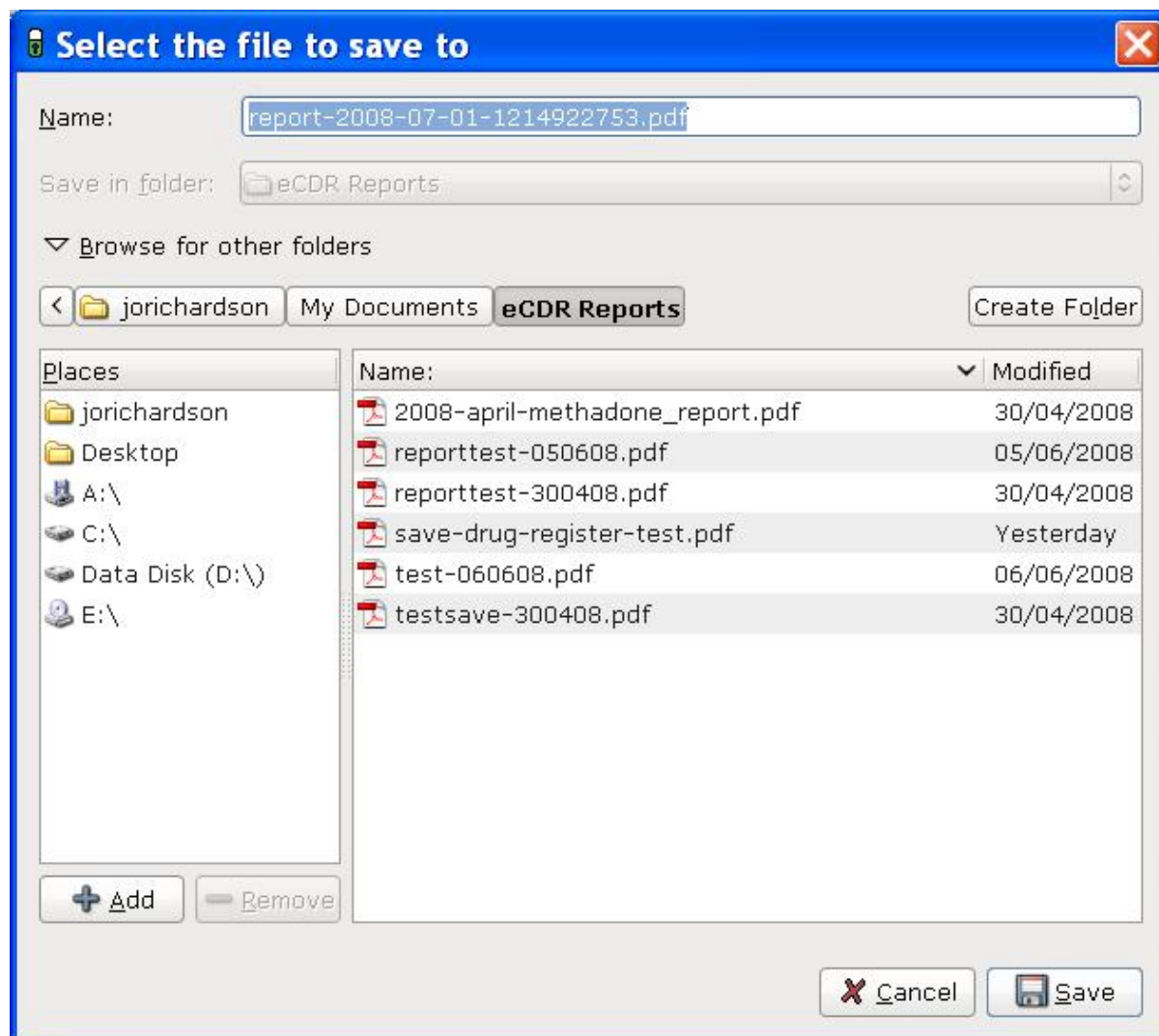
Cancellations

Contents

- Cancellations

As part of the legal requirement for the Electronic Controlled Drugs Register, entries may not be modified after entry for audit purposes. It is for these reasons that in order to remedy any mistakes, any entry can be cancelled.

The following will be recorded:

- A reason for cancellation

- The user making the cancellation

- The date and time of the cancellation.

The effect of the cancelled operation will then be reversed, and the cancelled item will appear as *cancelled* in the register for the relevant drug.

All cancellations are made from the reports page.

To cancel a report:

- Enter the date of the report or name of the drug you wish to cancel

- Highlight the specific report you wish to cancel by clicking on it

- Now click the *cancel* button

- You will be asked for a reason for cancellation

- Click *ok* and you will see a message confirming your cancellation.

Drug Destruction

Contents

- Drug Destruction

    - Viewing Destruction Logs

The Electronic Controlled Drug Register can log destruction of drugs which are:

- Returned by patients from this or any pharmacy

- Expired Stock

To access the destruction functions, select the *destroy* tab, and follow the procedure for marking drugs as destroyed.

If a patient has returned a drug select *patient return* or if an expired product is to be destroyed select *expired product*.

- Enter the drug name or select or the drug from the *drug name* drop down

- Select the strength and form of the drug from the drug list

If the drug is returned by a patient:

- Enter the name of the patient in *patient name*

- Enter the date the drug was returned *date returned*

- Enter the quantity destroyed in *quantity destroyed* (if this is an expired product, the amount will be limited by the current stock)

- Enter the destruction date in *date destroyed*

- Enter the name of the authorized officer in *name of authorized officer* field

- Enter the witnessing party in *destruction witnessed by*

- Click the *save* button

- The procedure may be cancelled at any time by clicking the *clear form* button.

13.1 Viewing Destruction Logs

Logs of all destructions are viewable in the *pharmacy stock destruction log* and the *patient returns destruction log* tabs on the Destroy page.

Managing Suppliers

Suppliers of controlled drugs must be added to the system in order that the system accurately audits where all supplies are received from.
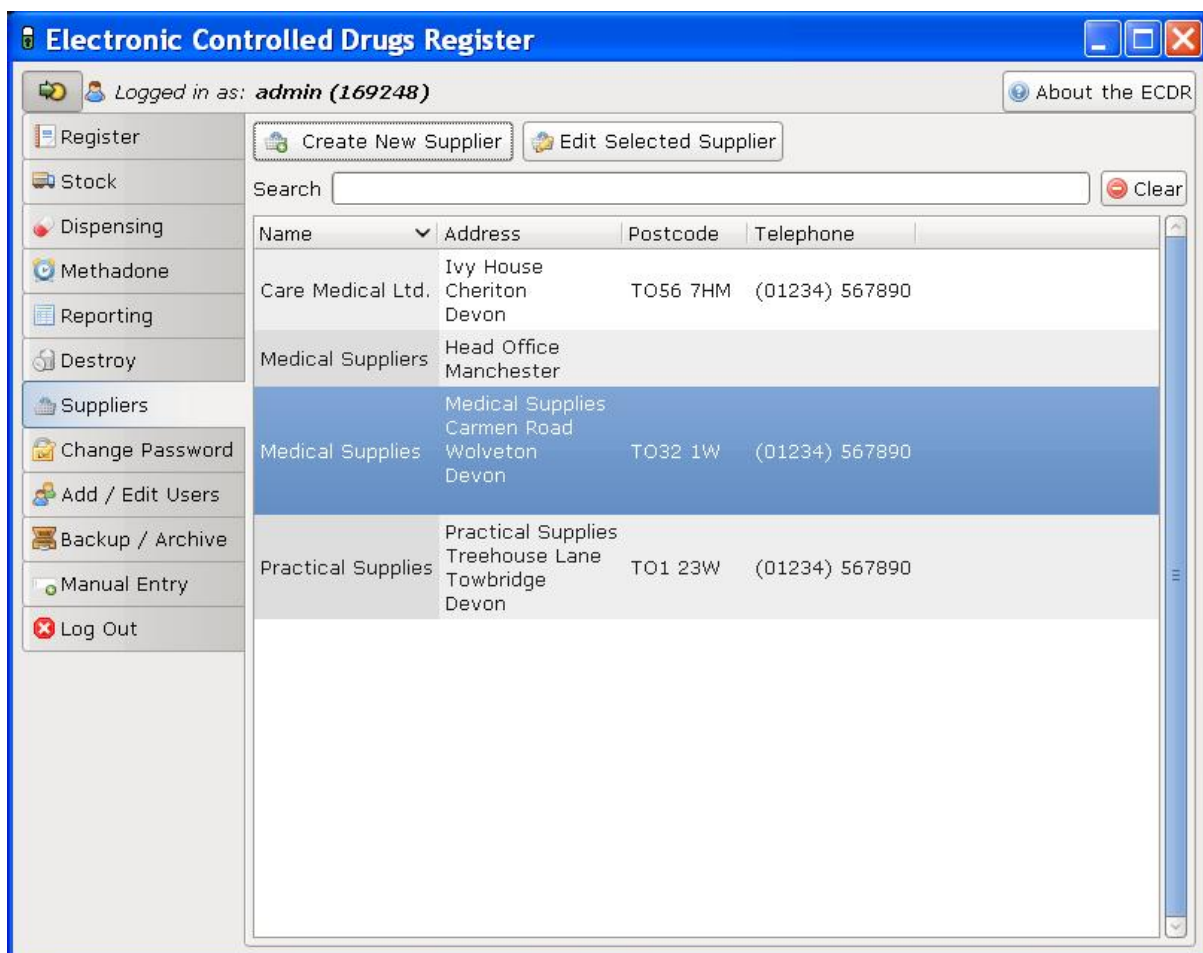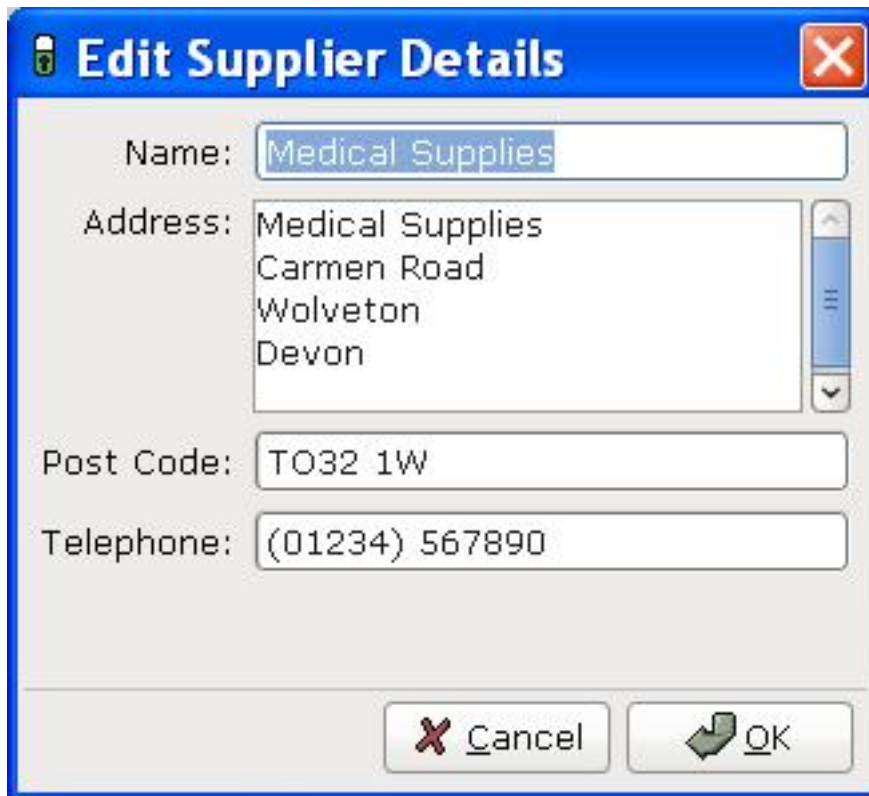
14.1 Adding Suppliers

Before stock can be received, suppliers must be added to the system.

To add a supplier:

- Select the *suppliers* tab

- Click the *create new supplier* button

- The supplier details should then be entered into the dialogue

- Click *ok* button to save the details.

The new supplier is now shown in the list of suppliers. You can cancel adding a supplier at anytime by clicking the *cancel* button.

For security purposes, Suppliers cannot be edited, if details are changed a new profile must be made.

14.2 Searching for a supplier

The supplier list can be searched by entering text into the text entry labelled *search*. Searching will automatically take place, and list the results in the item list. To stop searching, press the *clear* button. All the suppliers will now be visible in the supplier list.

Changing Passwords

Contents

- Changing Passwords

Only the current user can change their password.

The following procedure should be followed:

- Select the *change password* tab

- Enter current password in *current password*

- Enter new password in *new password*

- Confirm new password in *repeat password*

- Click *change password* button.

The new password must be used next time the user logs in.

To log out:

- Select the *log out* tab

- Click the *click here to log out* button

The log in window will automatically appear.

- Now log back in with your new password.

User Management

Contents

- User Management

    - Adding a User
    - Editing a User

Users of the Electronic Controlled Drug Register are classified under categories. They are:

- Administrators,

- Pharmacists,

- Technicians,

- Doctors,

- Inspectors.

16.1 Adding a User

A user may only be added by the administrator user. Once the administrator is logged in, you can add a user by:

- Select the *add / edit users* tab

- The user list will be displayed

- Click the *create a new user* button

- The user edit dialogue will be displayed

- Enter the user name in the *name* field

- Enter the user's registration credentials into the *registration* field

- Select whether the user is an "Administrator", "Pharmacist", "Technician", "Doctor" or "Inspector"

- Click the *ok* button.

Note: The user must change their password when first logging in to the system.
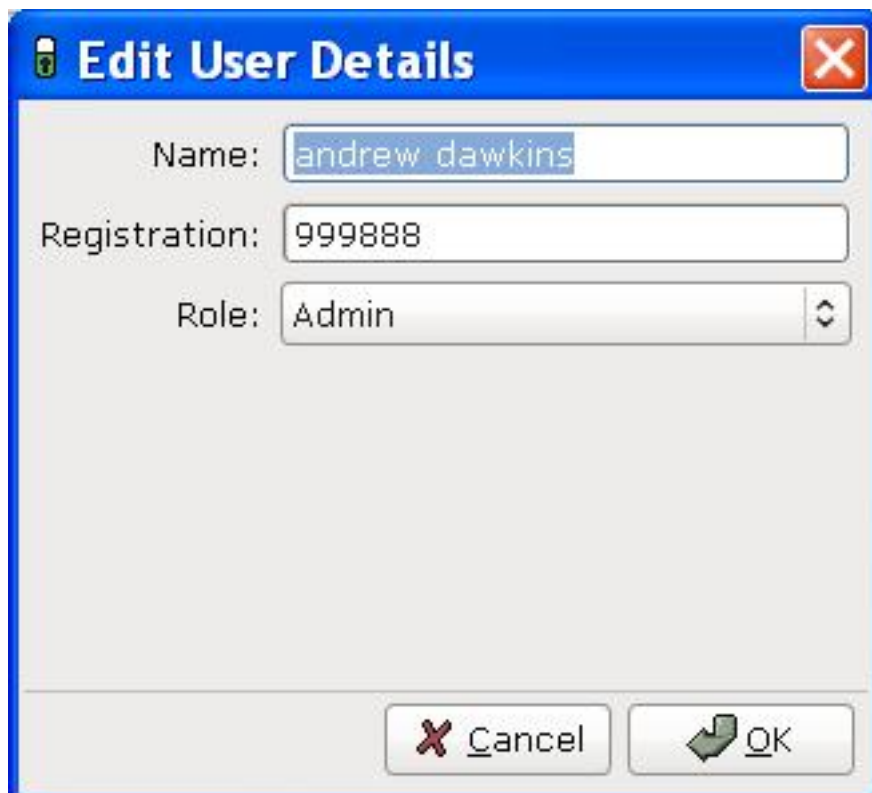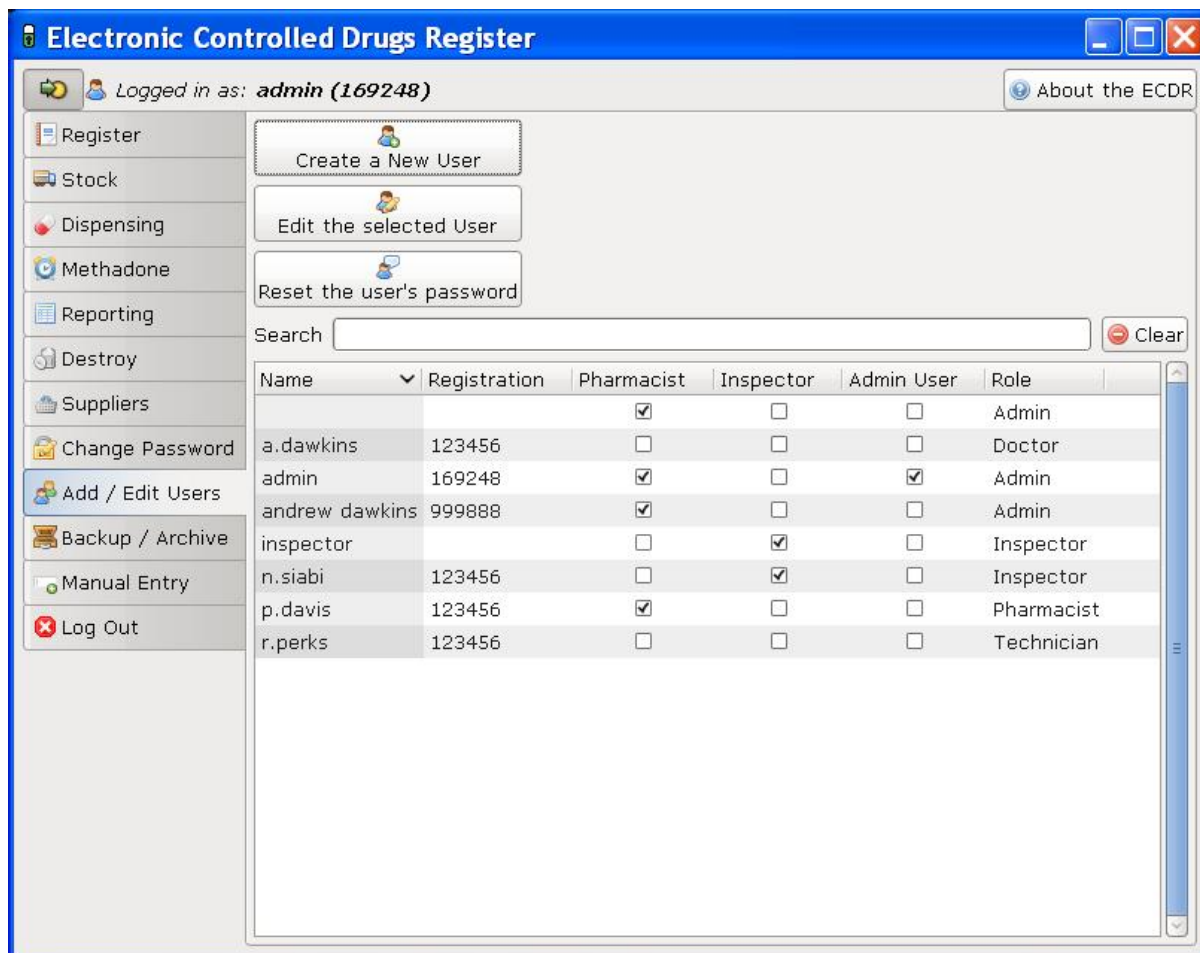
16.2 Editing a User

In order to edit a user's details:

- Select the *add / edit users* tab

- The user list will be displayed

- Select a user from the user list

- Click the *edit user* button

- The user edit dialogue will be displayed

- Modify the user's details as required

- Click the *ok* button.

System Back Up

Contents

- System Back Up
  - Creating a Back Up
  - Restoring From a Back Up.

> **Warning:** It is a legal professional requirement to make backups of the system. Please read this section carefully.

The system should be backed up regularly onto some kind of removable media. It can then be restored from such media at any time in the event of unavoidable hardware failure. The Electronic Controlled Drugs Register recommends backing up at least 4-5 times a day.

17.1 Creating a Back Up

To create a backup:

- Select the *backup / archive* tab

- Select the file name for the backup

- Click the *save* button on the save dialogue.

17.2 Restoring From a Back Up.

To restore the system from a backup:

- Select the *backup / archive* tab

- Click the *restore from backup* button

- You will be prompted to enter a reason for restoring

- The open dialogue appears

- Select the file name for the backup to restore from

- Click the *ok* button on the open dialogue

- The system will restart and the user must log in again.

Select the file to save the archive to

Name: 2008-07-01T16_01_21-137000.backup

Save in folder: backups

▽ Browse for other folders

C:\ | Program Files | CDR | **backups** | Create Folder

Places	Name:	Modified
joricardson	2008-april-dispenses_cancels_stocktakes.bac...	30/04/2008
Desktop	2008-april-empty_software.backup	29/04/2008
A:\	2008-april-manual_entry_only.backup	29/04/2008
C:\	2008-april-suppliers_added.backup	29/04/2008
Data Disk (D:\)	2008-april-users_added.backup	29/04/2008
E:\	2008july-test.backup	Today
	2008june- manual_entry_test.backup	05/06/2008
	2008may-before_testing.backup	16/05/2008
	2008may-newuser-addedforquickaccess.backup	08/05/2008
	2008may-test.backup	16/05/2008
	300408-pretestbackup.backup	30/04/2008
	backups_go_here.txt	22/11/2007

➕ Add ➖ Remove

✖ Cancel 💾 Save

Denward CDR

Please enter a reason for restoring from backup

✖ Cancel OK

Quick Guide

A quick and simple guide to getting started with the Electronic Controlled Drug Register.

18.1 Register

18.2 Receiving

18.3 Dispensing

18.4 Reporting

18.5 Destruction

Indices and tables

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- *Module Index*

- *Search Page*