Pharmacy Manager

Handout Manager User Guide (PM16.8)

Version 1.0

25 February 2025

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Registered name: **Cegedim Rx**. Registered number: 02855109

Registered address: Building 2, Buckshaw Station Approach, Buckshaw Village, Chorley, PR7 7NR

Website: https://cegedimrx.co.uk/

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An Introduction to Handout Manager

The **Handout Manager** functionality in **Pharmacy Manager** helps you to manage your bagged prescriptions that are ready to hand out to patients in your pharmacy.

Handout Manager enables you to:

- Configure your shelf, fridge and Controlled Drug cabinet locations at your pharmacy.
- Manage and update bagged prescriptions stored at your pharmacy.
- Print multiple bag labels for your bagged prescriptions depending on their locations, for example, one on a shelf and the other in a fridge.
- Audit and monitor when prescriptions are collected within **Pharmacy Manager**.
- Inform patients when prescriptions are ready to collect when integrated with patient applications.

Prerequisites

- Scanning device purchased from **Cegedim Rx** with **Handout Manager** installed. See Setting up your Handout Manager Device for the First Time on page 27 for details.
- Wi-Fi Connectivity - **Handout Manager** communicates directly with **Pharmacy Manager** over a securely encrypted connection. See Zyxel Wi-Fi Installation on page 30 for details.
- **Handout Manager** users set up under an Admin account. Users set up a 6-digit passcode to access the application. See Creating Device User Accounts on page 9 for details.

Preparing your Pharmacy for Handout Manager

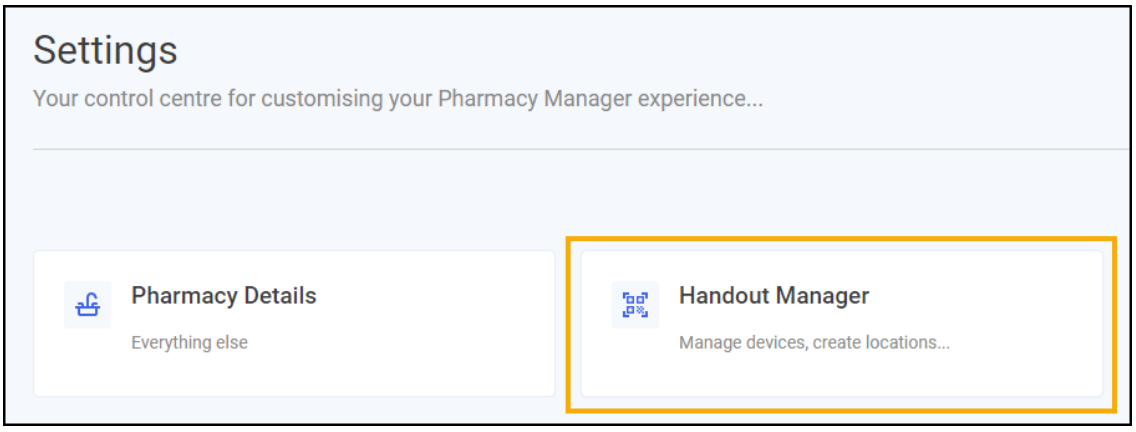
To prepare your pharmacy for **Handout Manager**, you should perform the following tasks before activation:

- Take some time to clear as much medication as possible that is on a shelf awaiting collection.
- Plan how many locations you need to configure as part of the activation process, for example, shelves, fridges or Controlled Drug cabinets.
- Be aware that initially your current collection process may need to run alongside your new **Handout Manager** collection process temporarily, until all the medication dispensed prior to the activation of **Handout Manager** is collected.

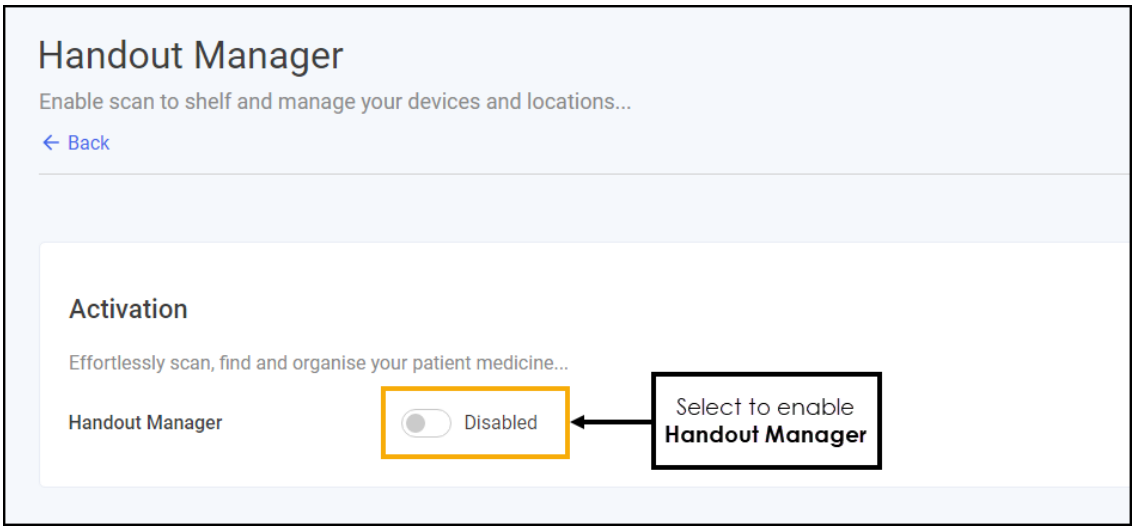
Activating Handout Manager

To activate **Handout Manager**:

1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. The **Handout Manager** screen displays. In **Activation**, select **Handout Manager** to enable the feature.

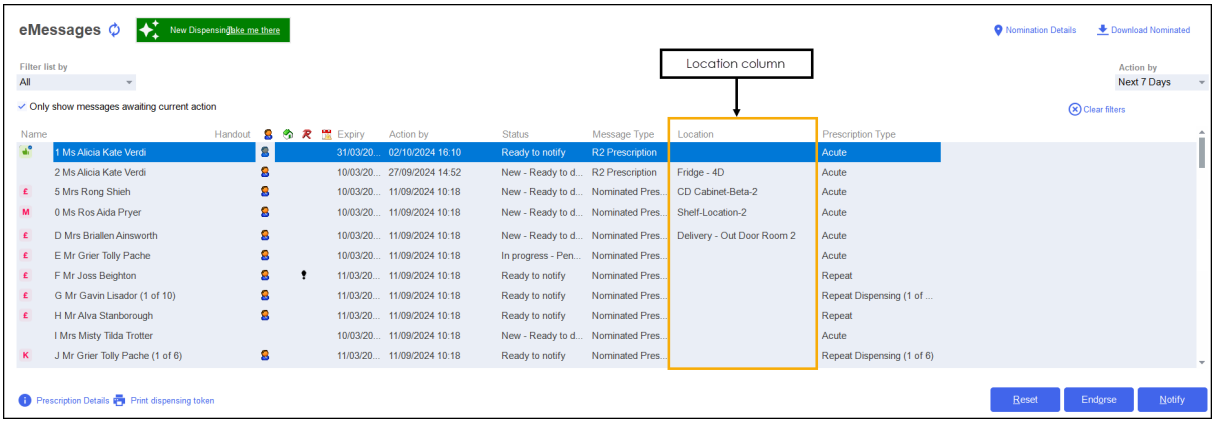


3. Restart **Pharmacy Manager** to apply the changes.

See Handout Manager Settings on page 11 for details on configuring **Handout Manager**, or Setting up your Handout Manager Device for the First Time on page 27 for details on setting up your **Handout Manager** devices.

Changes to eMessages screen

Activating **Handout Manager** displays an extra **Location** column on the **eMessages** screen.



Note - In the case of multiple locations, they display as **Shelf 1, Fridge 2**.

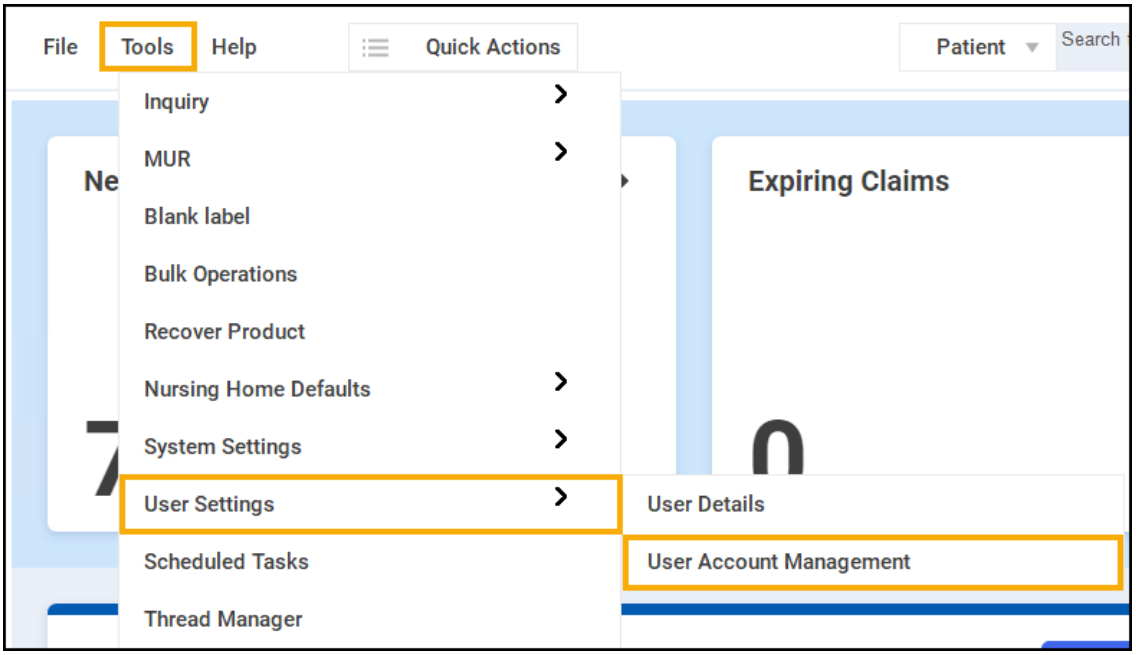
Creating Device User Accounts

You must have an account set up in **Pharmacy Manager** before you can start using **Handout Manager**.

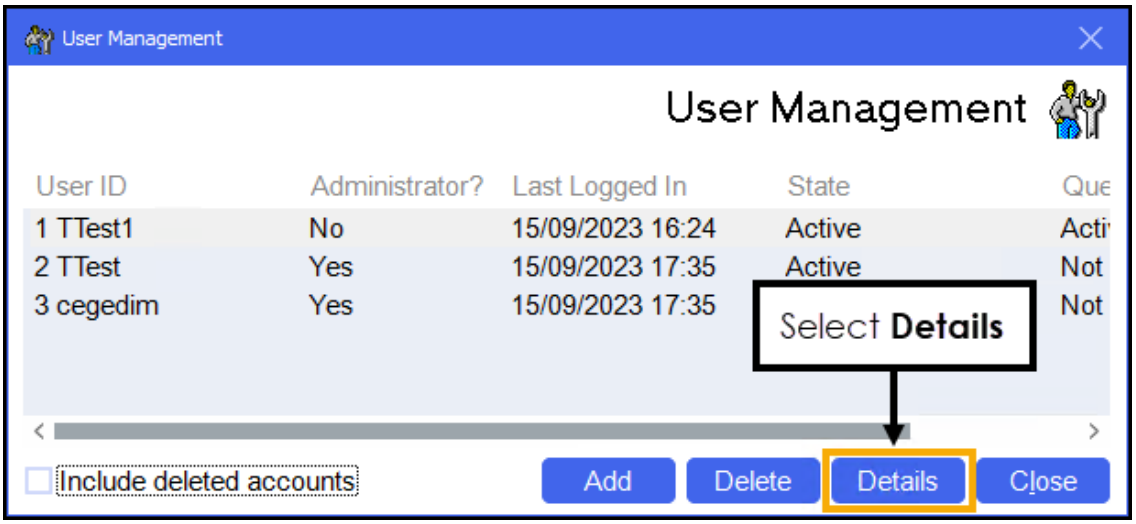
Important - Each user must have their own separate account set up, see Adding a User for details.

Each **Pharmacy Manager** user is required to have their own access to **Handout Manager**, to set this up:

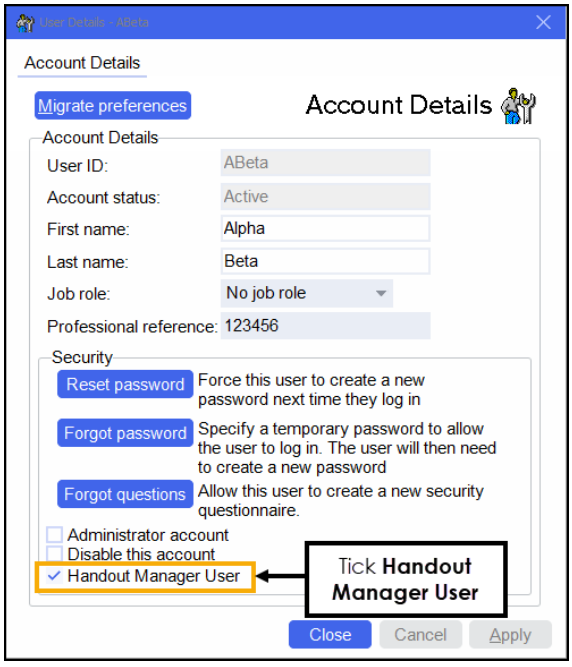
1. From **Pharmacy Manager**, select **Tools** - **User Settings** - **User Account Management**.



2. The **User Management** screen displays, highlight a user and select **Details**.



3. The **User Details** screen displays.



Tick **Handout Manager User**.

4. Select **OK** to save. The user now displays on the **Who's logging in** screen of **Handout Manager**.

See Signing in to Handout Manager on page 38 for details.

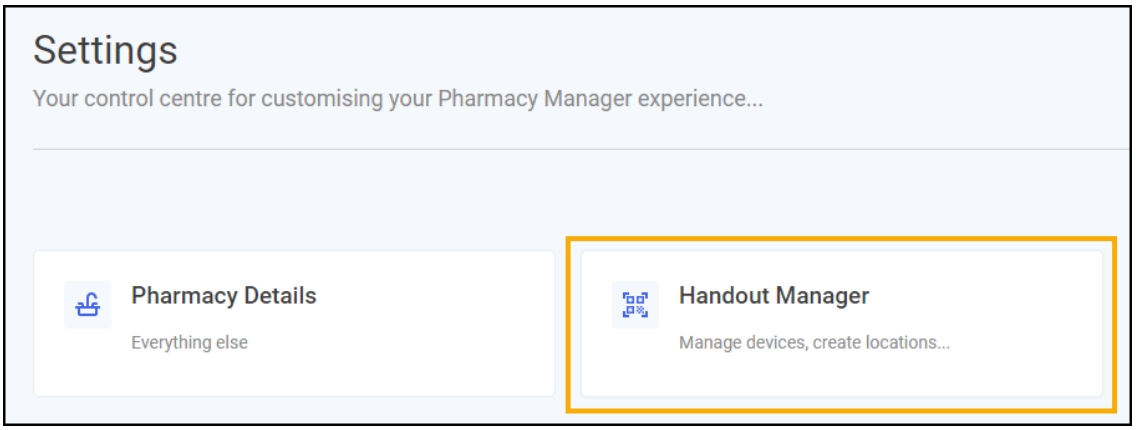
Handout Manager Settings

Device Registration

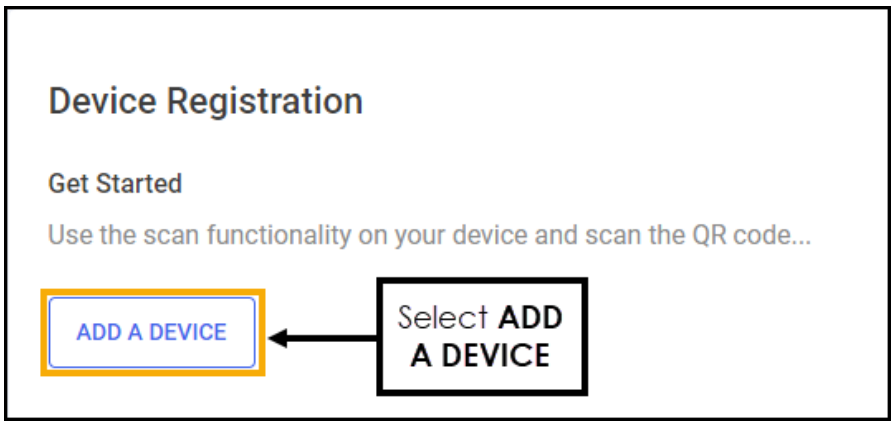
Each device must be registered to **Pharmacy Manager** before use.

To register a device:

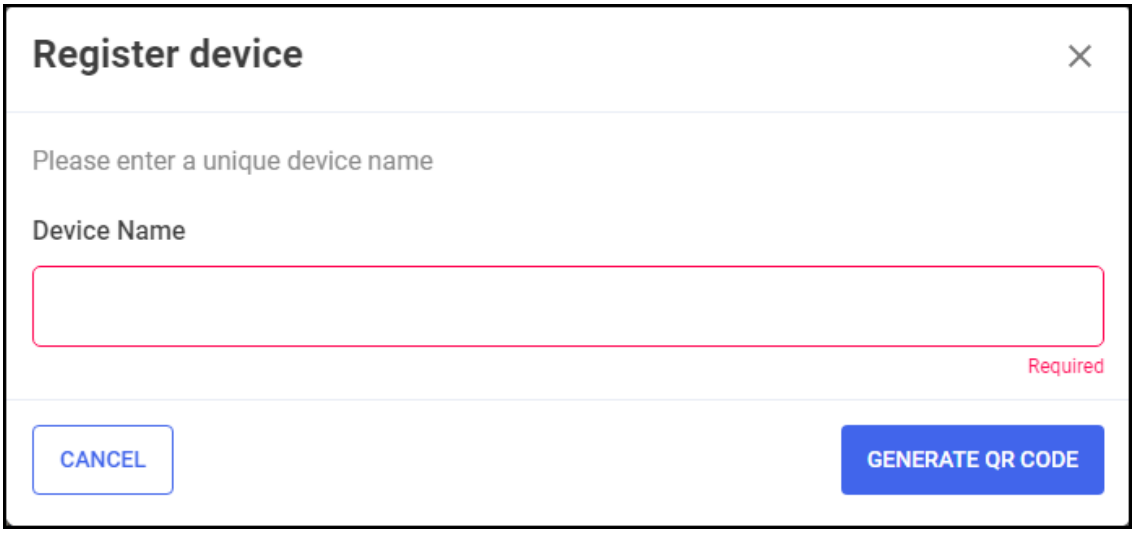
1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Device Registration** - **Getting Started** select **ADD A DEVICE** ADD A DEVICE.



3. The **Register device** screen displays, enter a unique device name.



4. Select **GENERATE QR CODE** GENERATE QR CODE.

5. A QR code displays on the screen, use the scan functionality on the device you are registering to scan the code.

Once connected, the **Handout Manager SIGN IN** screen displays.

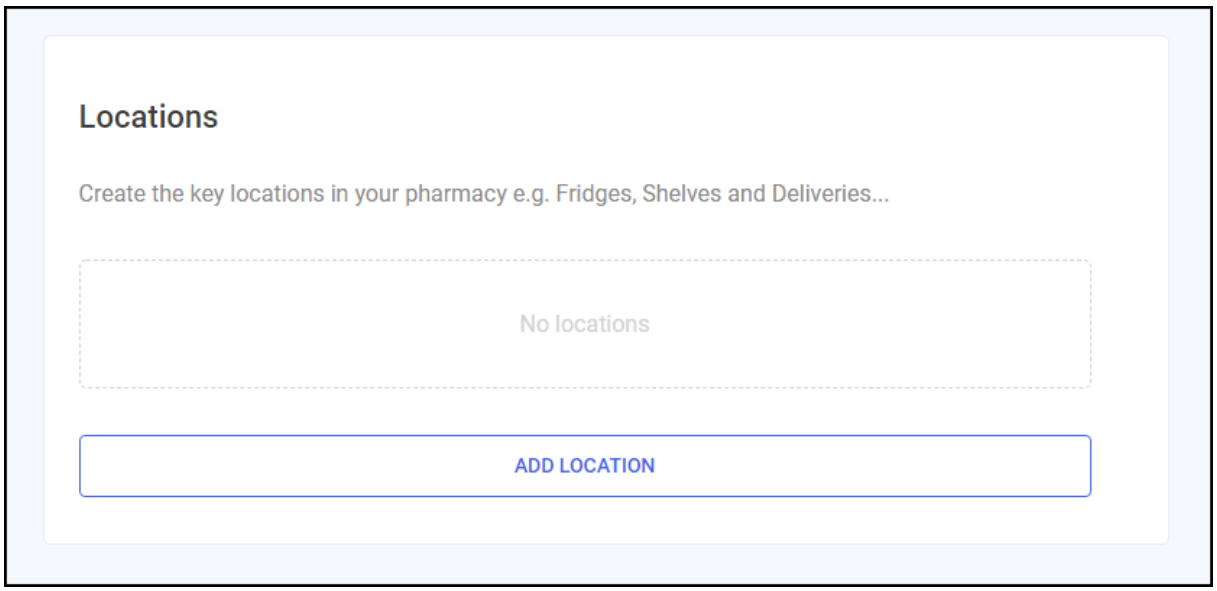
See Device Management on page 33 for details on managing your devices and Signing in to Handout Manager on page 38 for details on signing in to **Handout Manager**.

Location Management

Create locations across your pharmacy, this could be multiple shelf locations, deliveries, fridges or Controlled Drug cabinets.

Important - Don't forget to create at least one fridge location and one Controlled Drugs location in addition to your shelf locations.

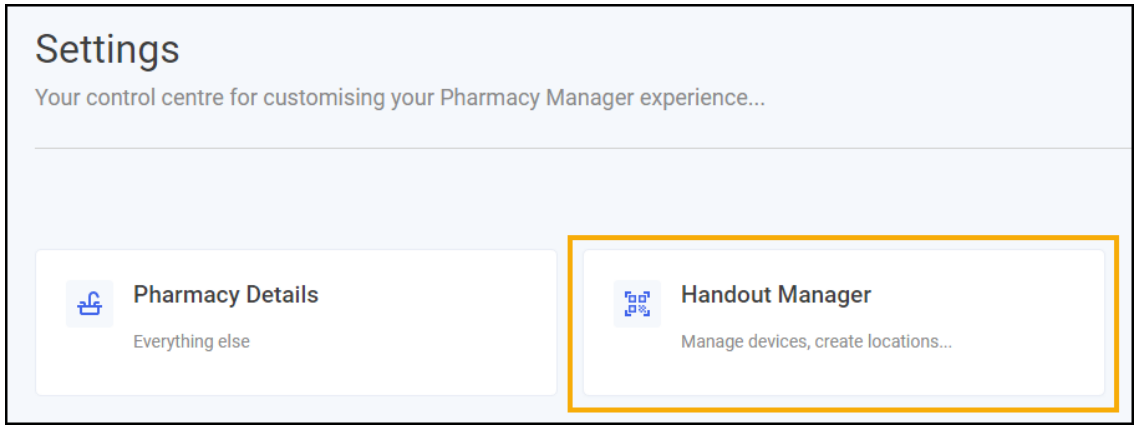
When you first enable **Handout Manager** there are no locations set up.



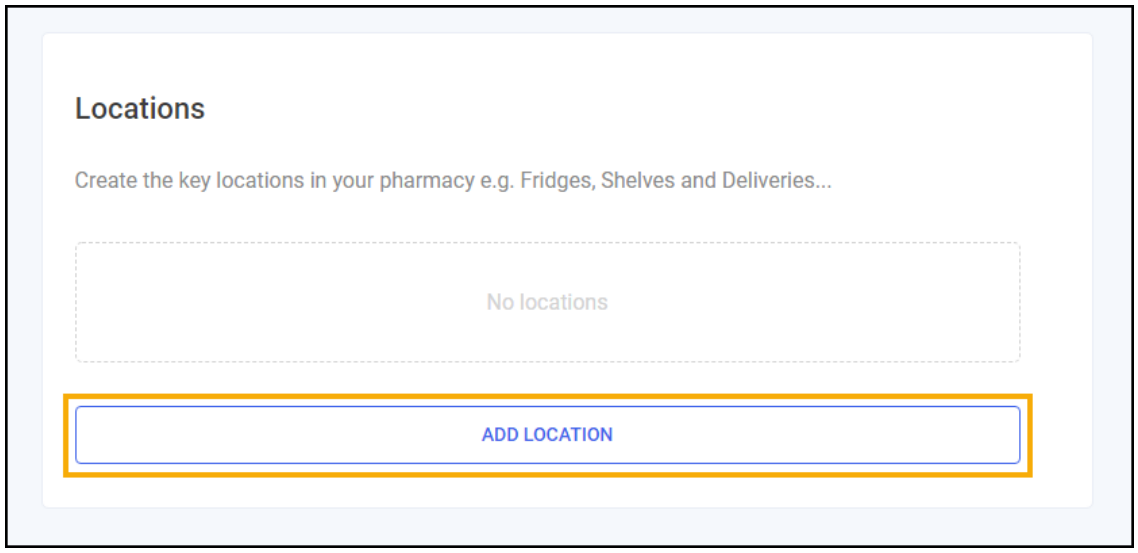
Adding a New Location

To add a new location:

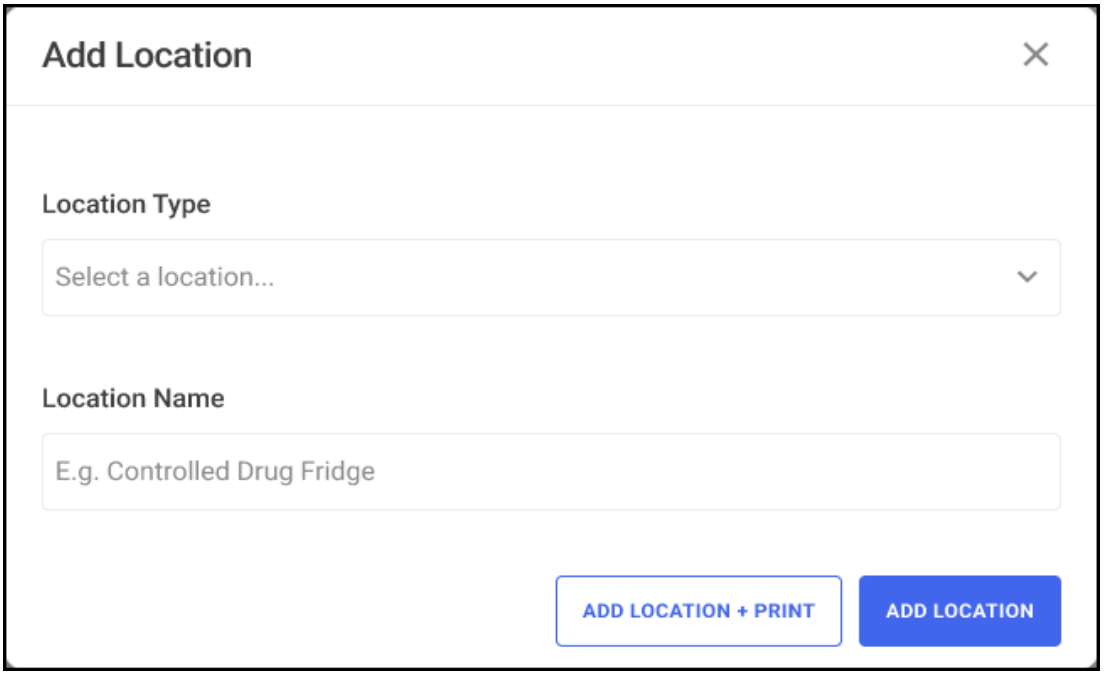
1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Locations**, select **ADD LOCATION** ADD LOCATION.



3. The **Add Location** screen displays.

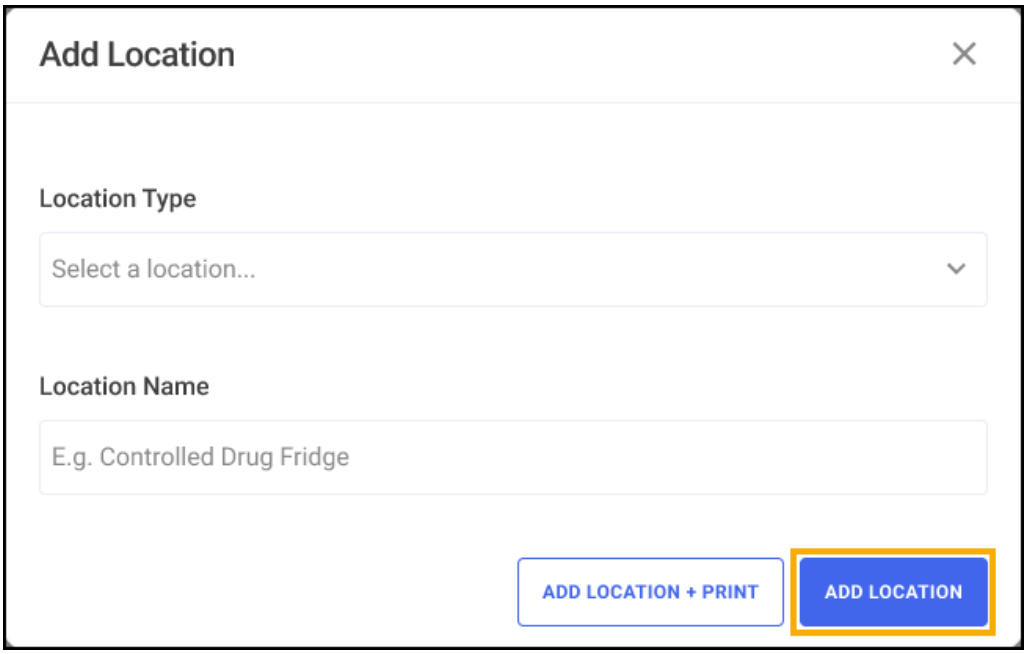


Enter the following:

- **Location Type** - Select the correct location type from the drop-down list.
- **Location Name** - Enter a name for the location, for example, **Top Shelf** or **Controlled Drug fridge**.

4. Select **ADD LOCATION**

.



Training Tip - To print the location label at the same time, select **ADD LOCATION + PRINT** ADD LOCATION + PRINT.

Additionally, once all locations are created, from **Locations**, select **PRINT ALL** PRINT ALL.

See Location Management on the next page and Printing Location Labels on page 23 for details on managing your locations and printing location labels.

Location Management

You can manage your **Handout Manager** locations in the pharmacy.

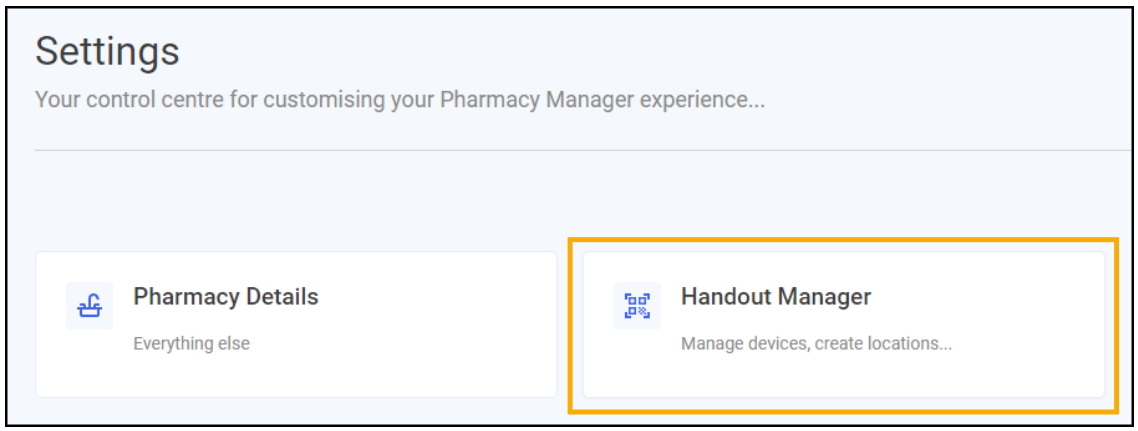
Important - Don't forget to create at least one fridge location and one Controlled Drugs location in addition to your shelf locations.

See Handout Manager Settings on page 11 for details on adding a new location.

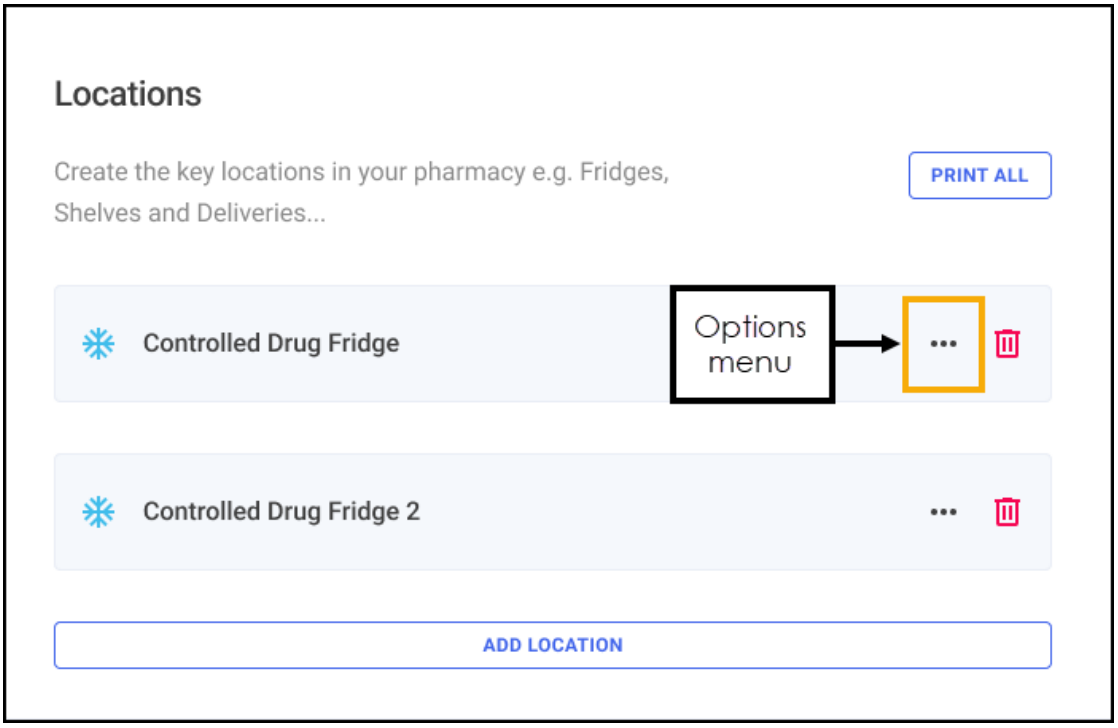
Editing Locations

To edit a location:

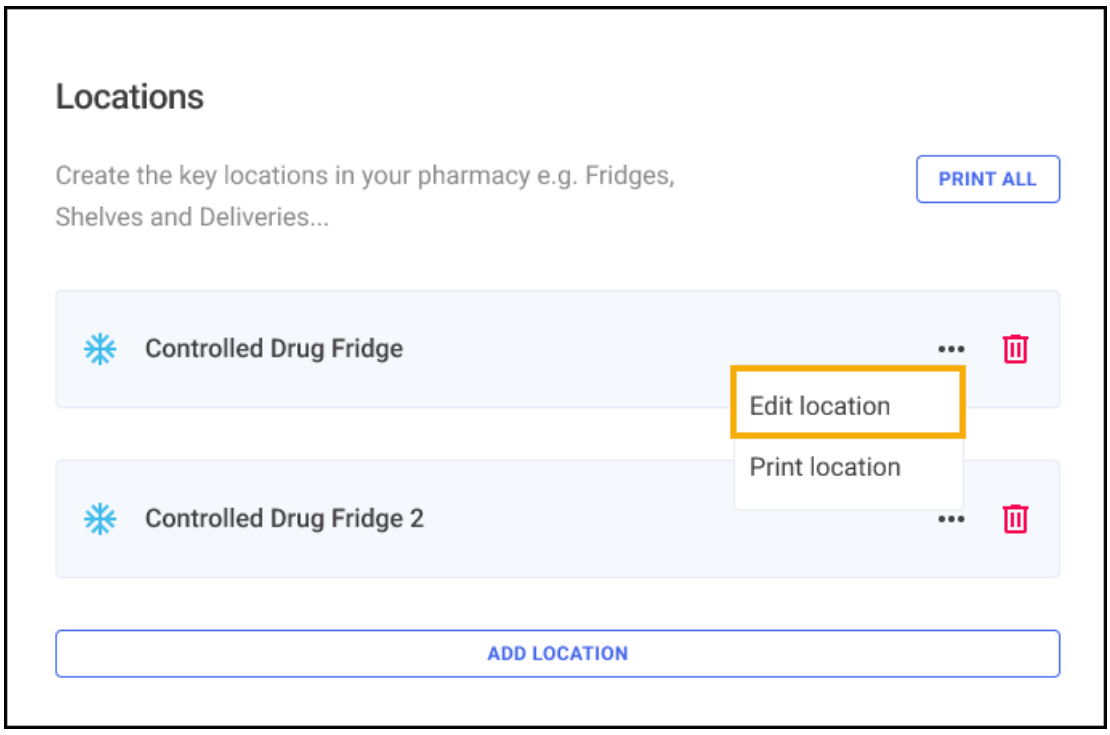
1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Locations**, select **Options** next to the required location.



3. Select **Edit location**.

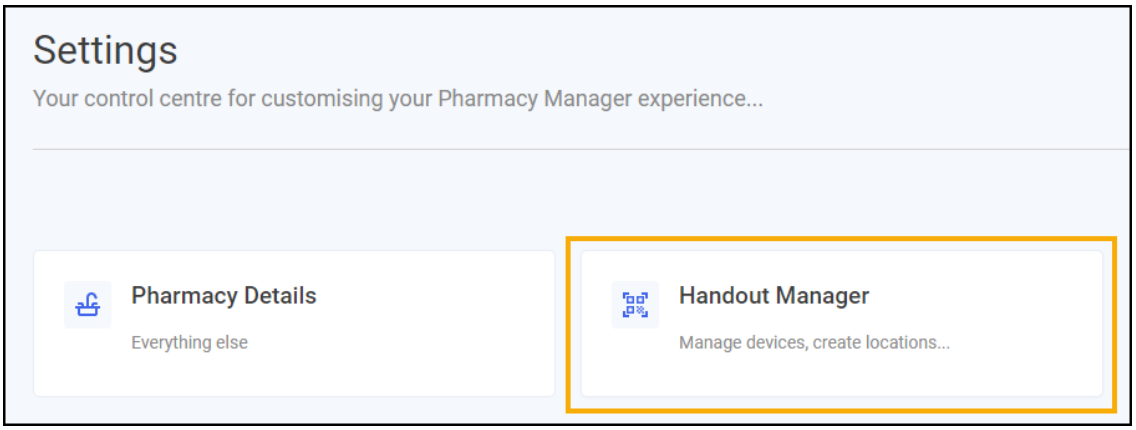


Note - You cannot edit a location if bags are assigned to it.

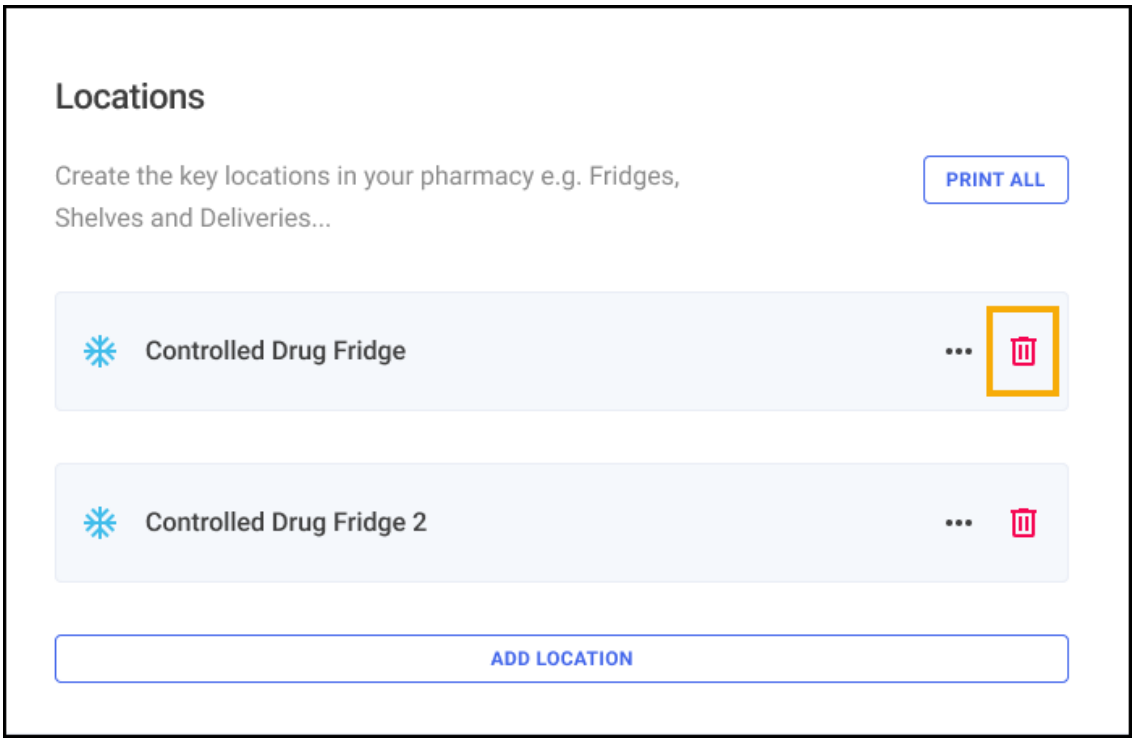
4. The **Edit Location** screen displays, make the changes required and then select **SAVE CHANGES** SAVE CHANGES.

Deleting Locations

1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.

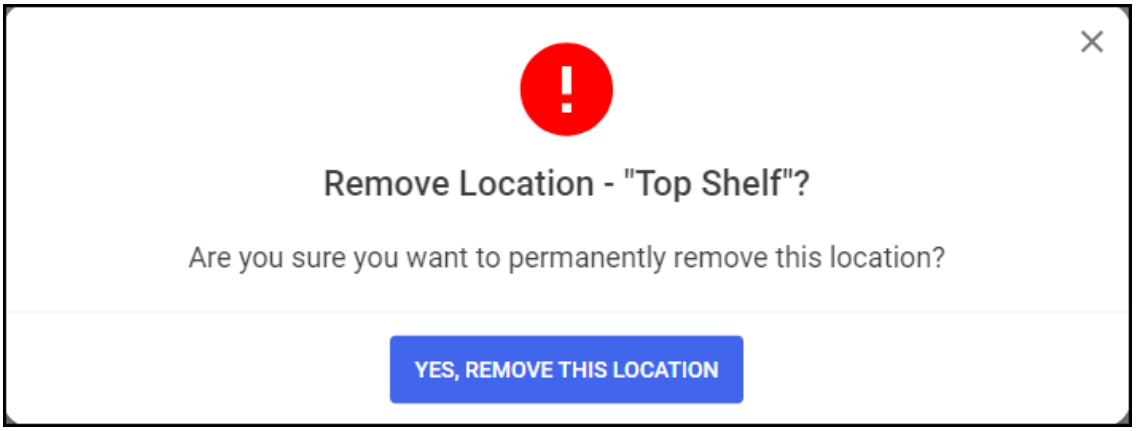


2. From **Locations**, select **Delete** next to the required location.



Note - You cannot delete a location if bags are assigned to it.

3. An 'Are you sure you want to permanently remove this location' warning displays.



Select **YES, REMOVE THIS LOCATION** YES, REMOVE THIS LOCATION.

Training Tip - When deleting a location, remember to remove any labels from the physical location.

Printing Location Labels

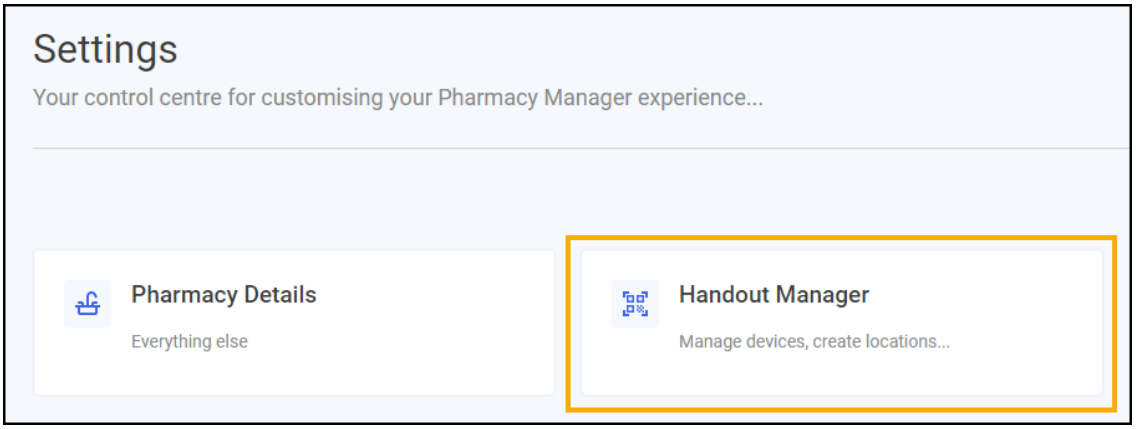
Location labels contain unique QR codes, these are used to assign bags to your various locations. Simply print the location label and apply it to the appropriate location in the pharmacy.

You can print a single location label or bulk print location labels for all locations.

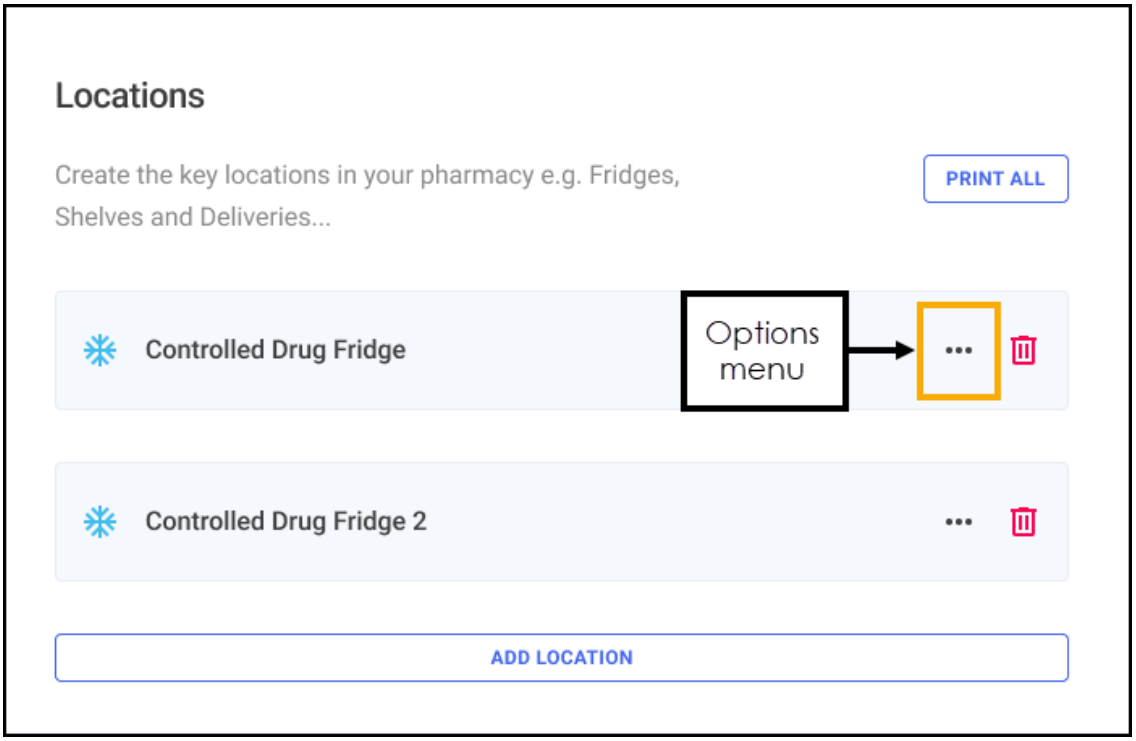
Printing a Single Location Label

To print a single location label:

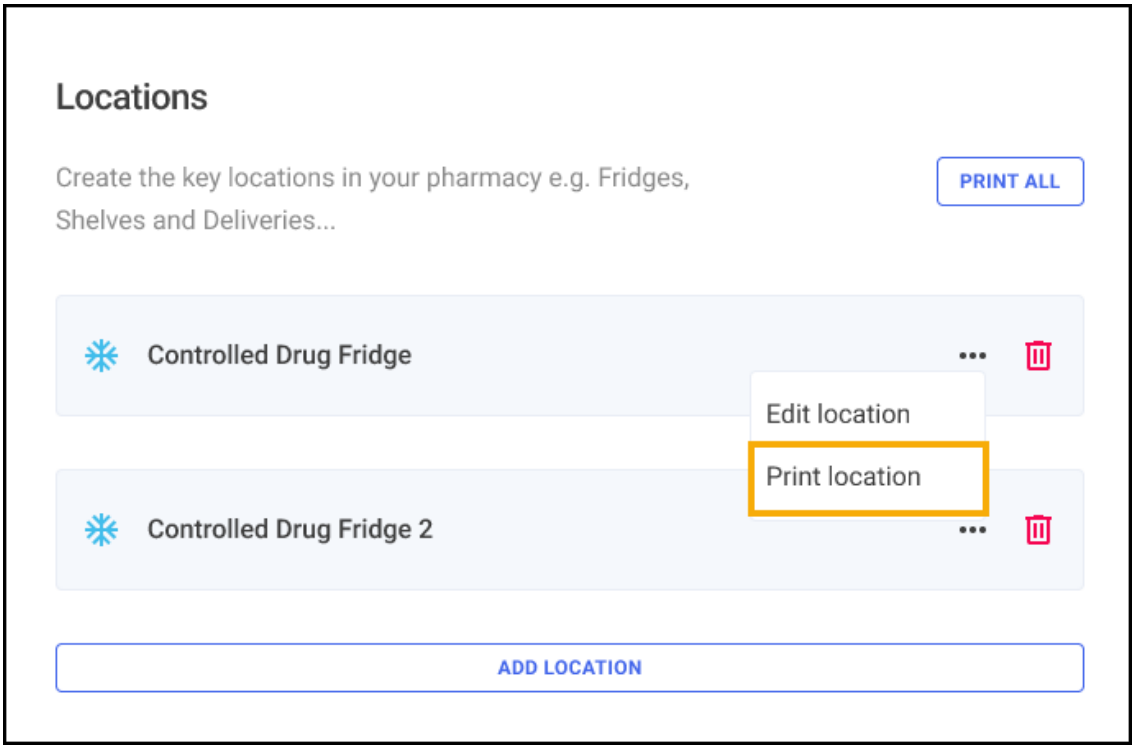
1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Locations**, select **Options** next to the required location:



3. Select **Print location**.

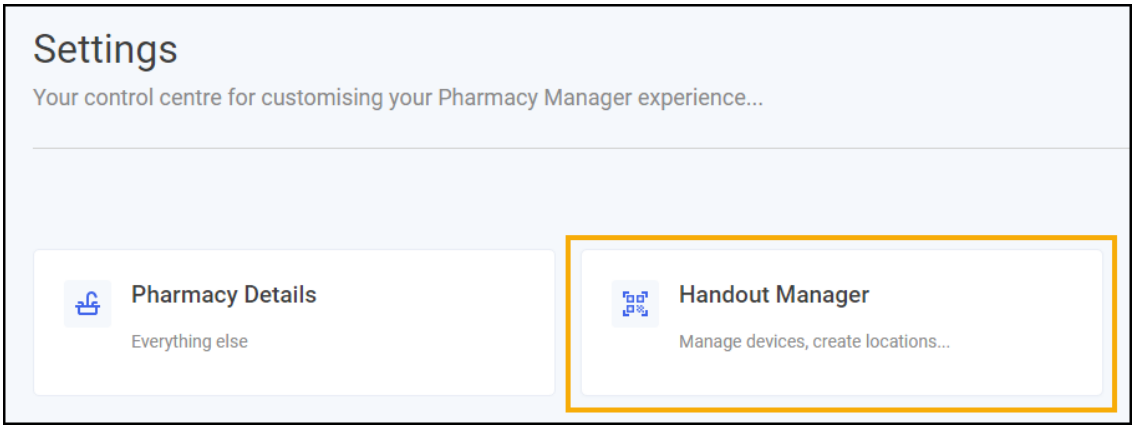


A label prints for the selected location.

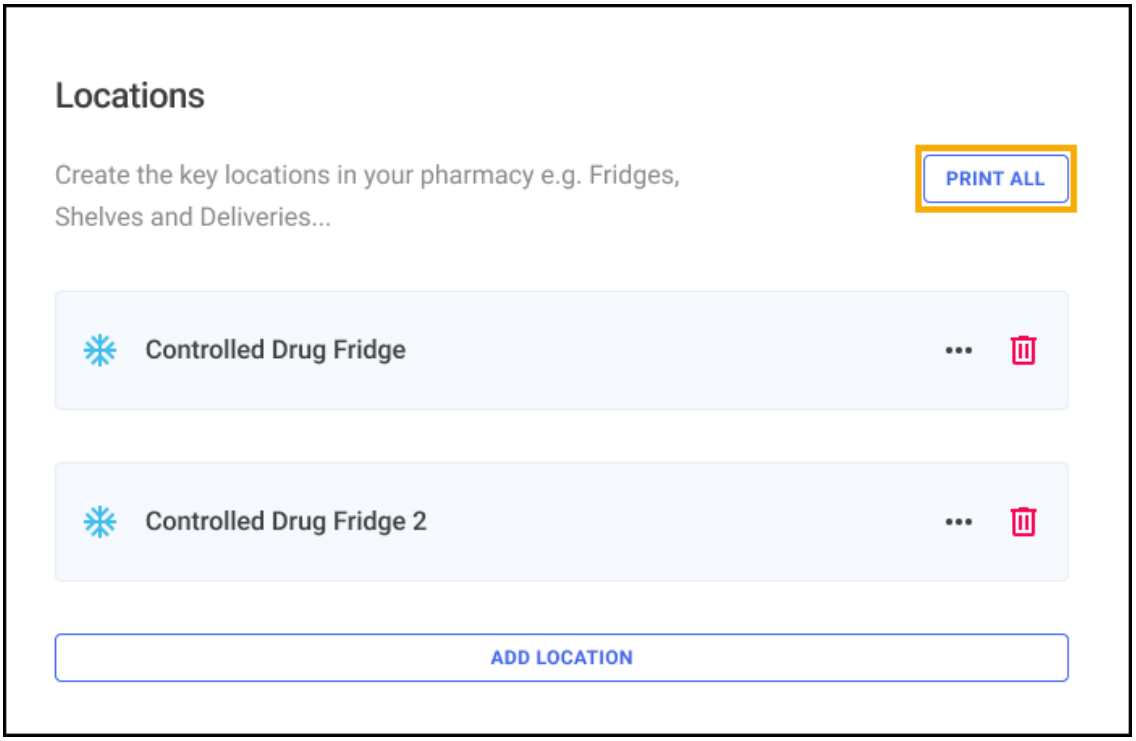
Bulk Printing Labels for All Locations

To print labels for all locations:

1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Locations**, select **PRINT ALL** PRINT ALL.



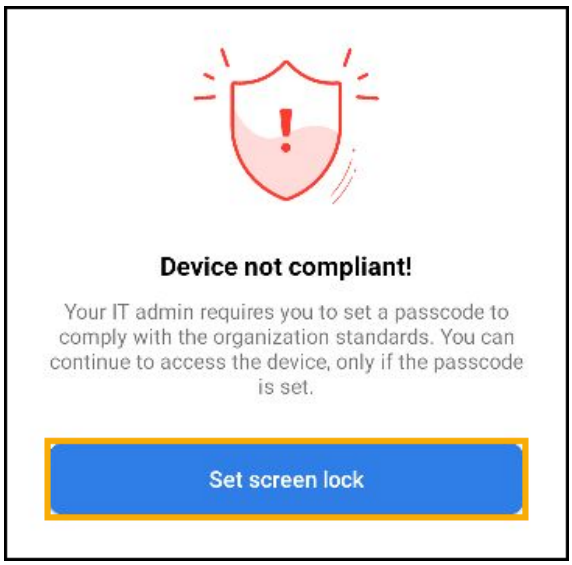
Note - **PRINT ALL** PRINT ALL only displays when you have added locations.

All location labels print.

Setting up your Handout Manager Device for the First Time

When you first receive your **Handout Manager** device, use the following steps to secure it with a Personal Identification Number (PIN), connect to the Wi-Fi and then register to **Pharmacy Manager**.

1. Remove the device from its packaging and press and hold the **Power** button on the right-hand side until the **Android** logo displays.
2. A start up sequence takes approximately 45-60 seconds until the **Device not compliant** screen displays.



   Select **Set screen lock**.
3. The **Choose a screen lock** screen displays, select **PIN**.
4. On the **Set a PIN** screen, enter a PIN for the device, it must be a minimum of 6 digits.

> **Note** - Common PIN codes are not be permitted, for example, 123456.

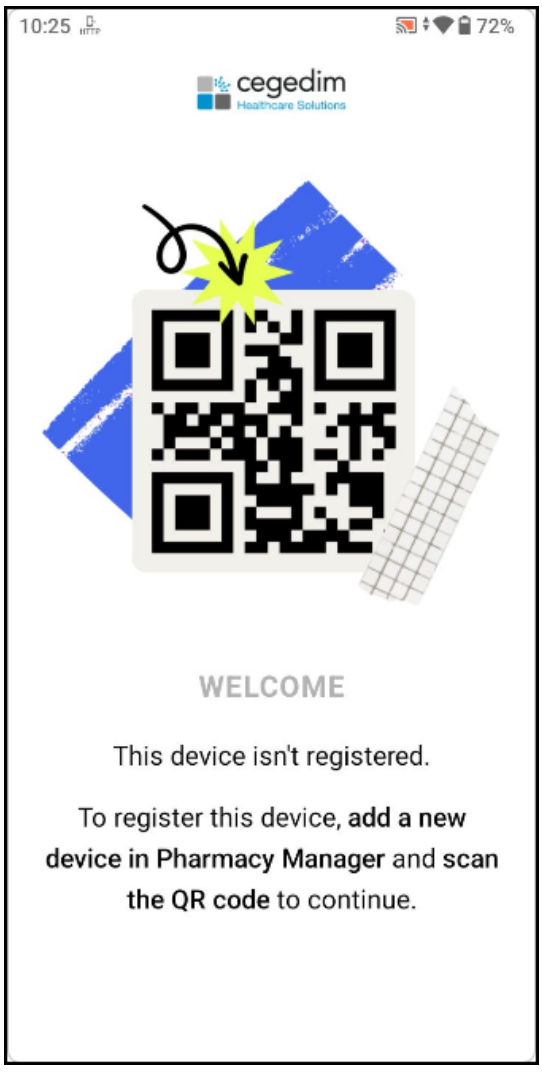
5. Select **Next**.

6. The **Re-enter your PIN** screen displays, enter your PIN and then select **Confirm**.
7. Verify the device connects to the Wi-Fi.

> **Note** - If the device does not connect to the Wi-Fi speak to your **Cegedim Rx** representative.

8. The desktop displays, select **Handout Manager**

.
9. The **Welcome - This device isn't registered** screen displays.



You can now register the device with **Pharmacy Manager**. See Handout Manager Settings on page 11 for details.

Zyxel Wi-Fi Installation

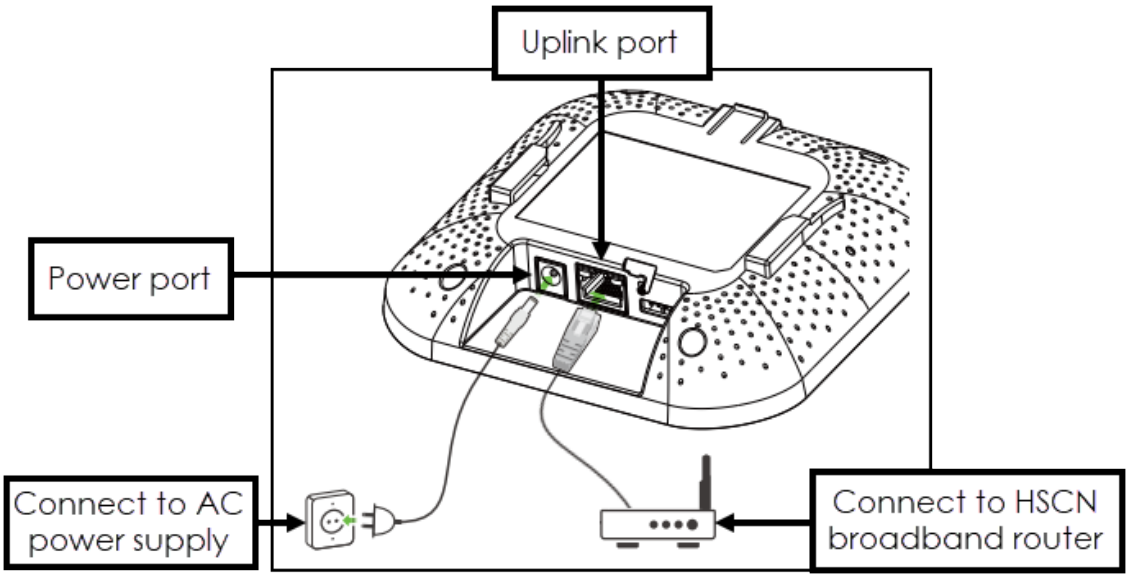
Thank you for purchasing the Zyxel Wi-Fi access solution from **Cegedim Rx**. The Zyxel Wi-Fi unit supports solutions like **Handout Manager** within **Pharmacy Manager**.

This document provides detailed instructions on how to install the Zyxel Wi-Fi unit, please follow all instructions carefully:

1. Locate your HSCN broadband router. Depending on your connection type this is either a Cisco 857 or Cisco 927 as shown.

Cisco 857	Cisco 927

2. Take the Zyxel Wi-Fi unit out of the box and position it in a suitable location near the router and a power supply. For optimal signal performance, we recommend placing the unit as high as possible and outside of any cupboards.
3. Connect the power adapter supplied with the Zyxel Wi-Fi unit to the nearest available AC socket.



4. Use the provided network cable to connect the **Uplink** port on the Zyxel Wi-Fi unit to the furthest network port on the left of your HSCN broadband router:

   - **Cisco 857** - Port FE1 (ideal), port FE2 or port FE3

   - **Cisco 927** - Port 1 (ideal), port 2 or port 3

> **Note** - Port FE0 (Cisco 857) or port 0 (Cisco 927) is used for the D-Link network switch, do not remove this.

5. Switch on both the HSCN broadband router and the Zyxel Wi-Fi unit. The unit will undergo a series of updates, indicated by flashing lights, once the device displays a solid blue light, it is ready for use and should be left

powered on.

For details on setting up your new **Handout Manager** scanning device, see Setting up your Handout Manager Device for the First Time on page 27.

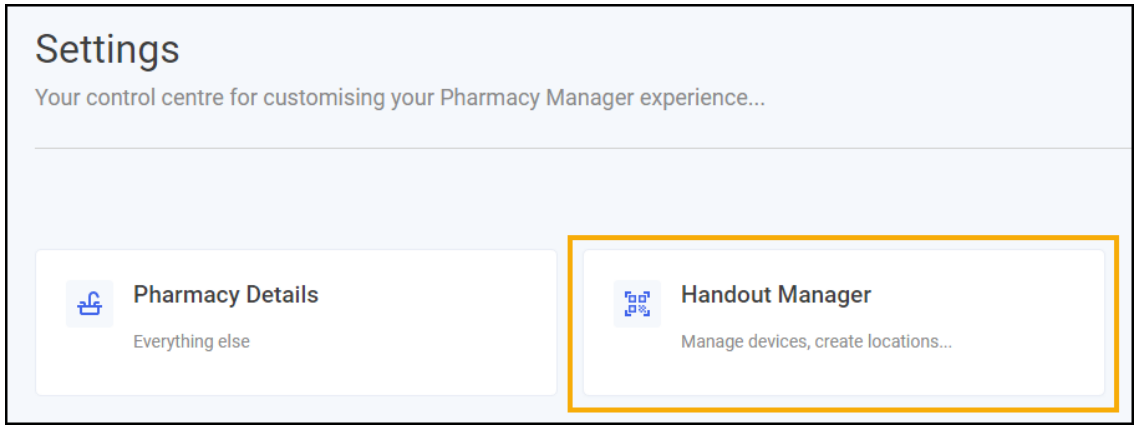
Device Management

See Handout Manager Settings on page 11 for details on registering a device to **Pharmacy Manager**.

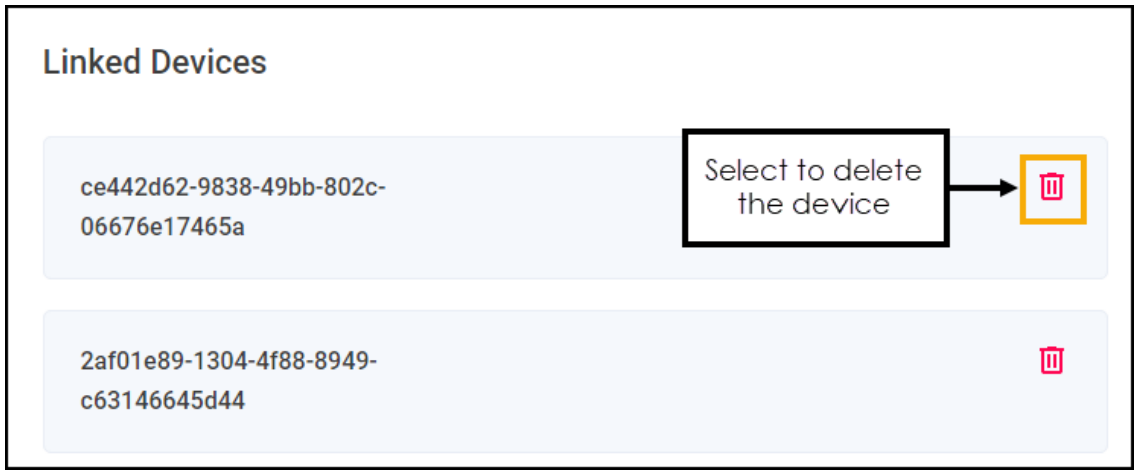
Removing Linked Devices

To remove devices that have been registered to **Pharmacy Manager**:

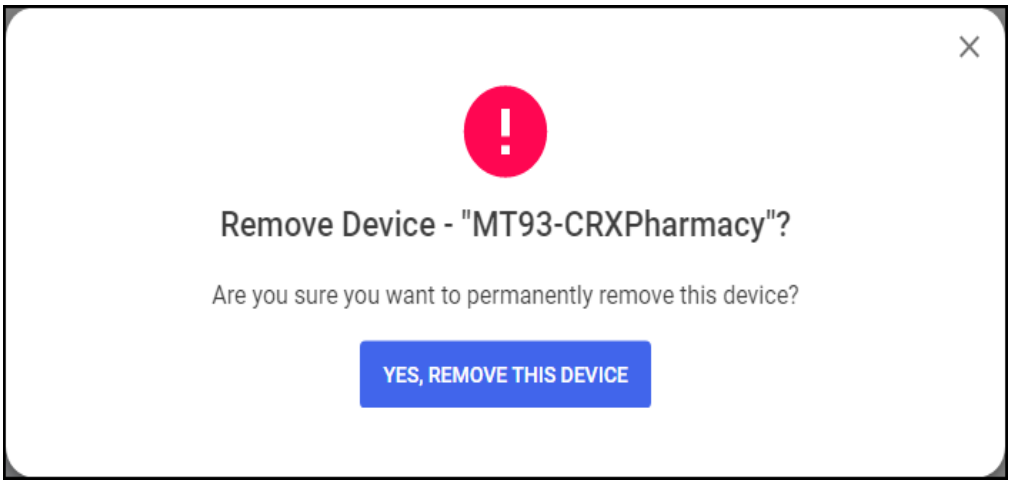
1. From the **Pharmacy Manager Toolbar**, select **Tools** - **Settings** - **Handout Manager**.



2. From **Device Registration** - **Linked Devices**, select **Delete** next to the required device.



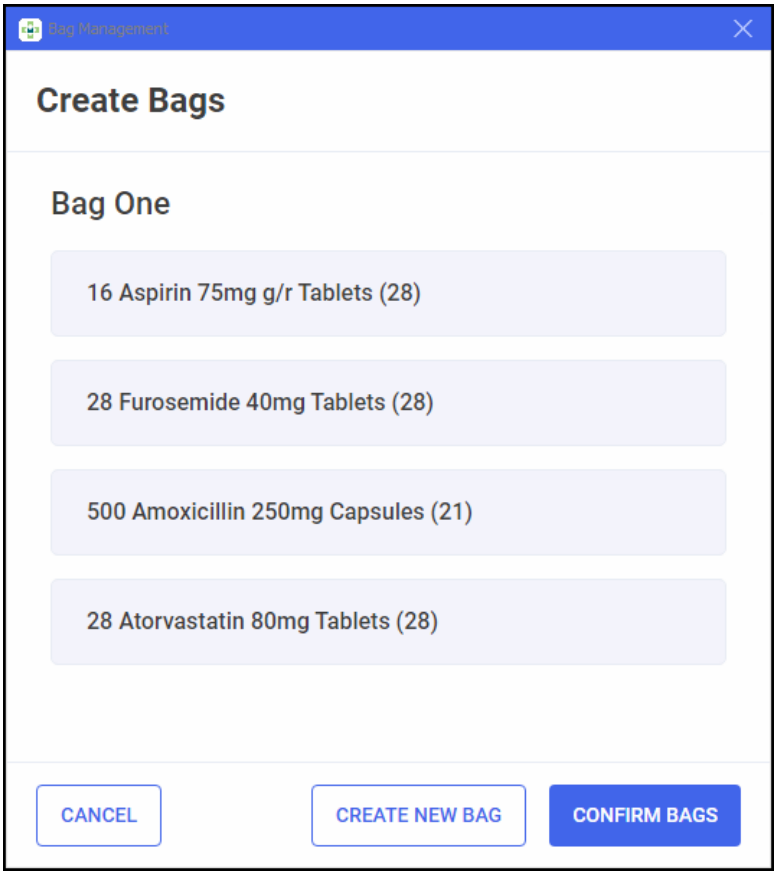
3. An 'Are you sure you want to permanently remove this device' warning displays.



Select **YES, REMOVE THIS DEVICE** YES, REMOVE THIS DEVICE.

Bag Management

The **Create Bags** screen displays automatically each time you finish on the **Dispensary** screen. If you need to assign items to multiple bags so that they can be assigned to different locations for example shelves, fridges or Controlled Drug cabinets, then you must do so from this screen. If you do not then all items will be assigned to the same bag by default.



Select from the following:

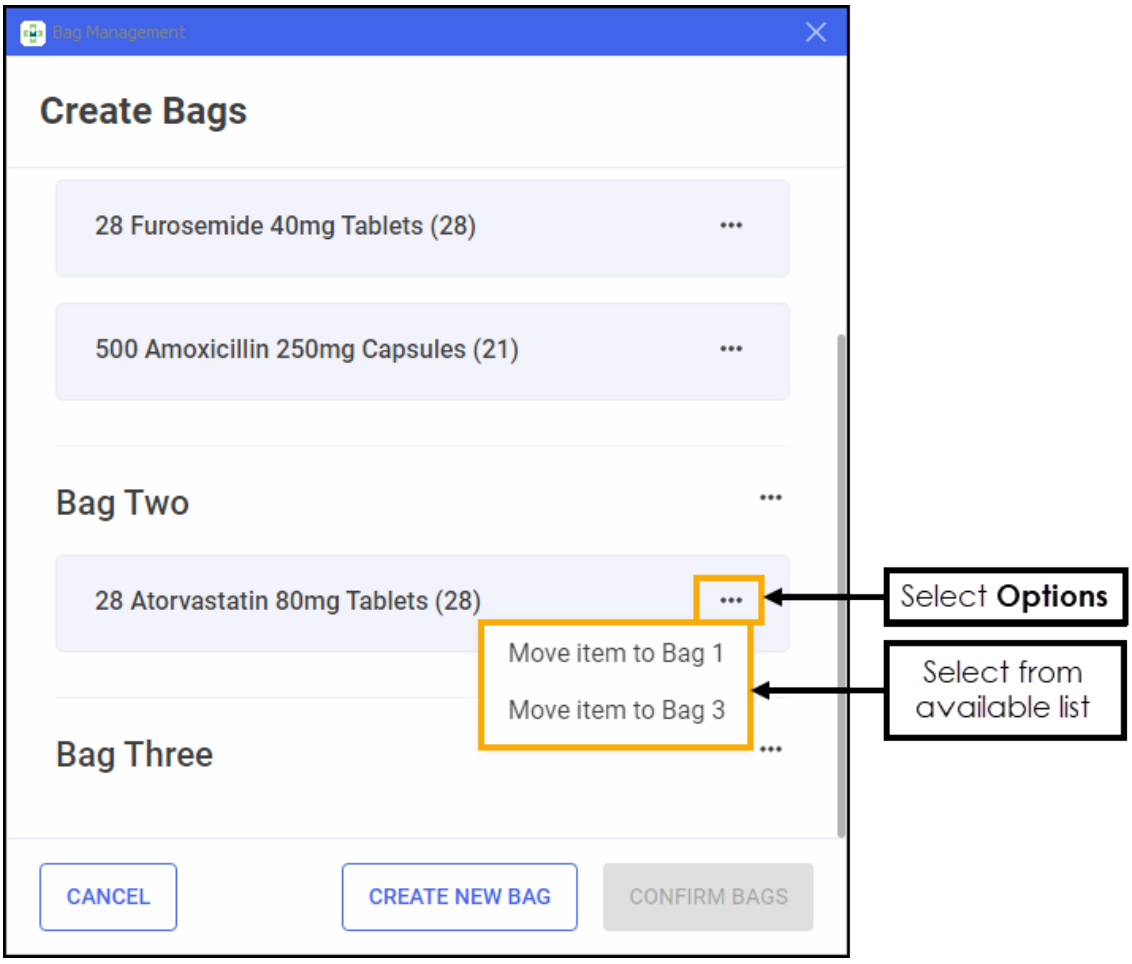
- **CANCEL** - To close the **Create Bags** screen, no bag label is created.
- **CREATE NEW BAG** - To create a new bag, this displays underneath the prescription items.
- **CONFIRM BAGS** - To confirm the current bags are correct, this is unavailable if there are bags with no items assigned. The bag labels print for this prescription.

Note - If you need to open the **Bag Management** screen to make amendments you must edit the prescription and the **Bag Management** screen displays once you finish the edit.

Moving Items Between Bags

To move an item from one bag to another:

1. Select **Options** ••• next to the item you want to move.

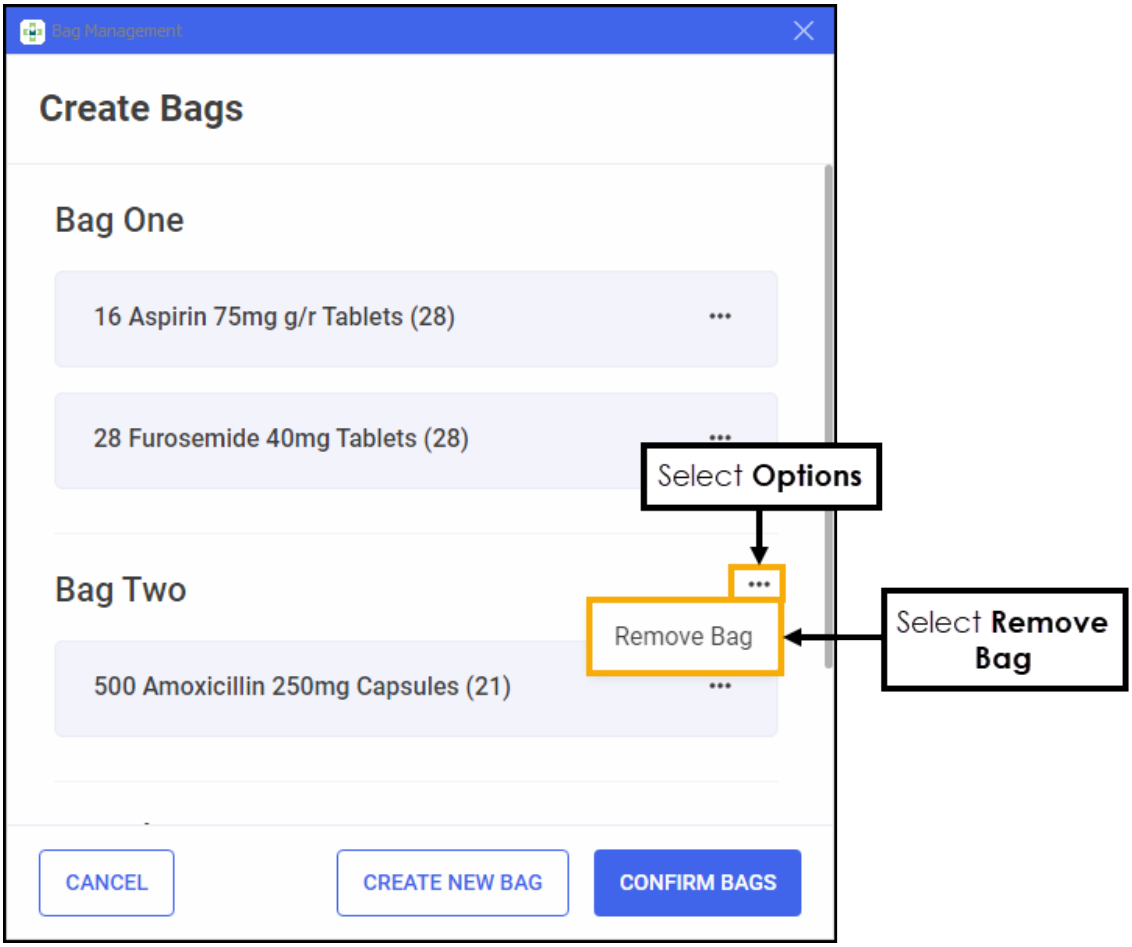


2. Select **Move item to Bag n**, where *n* is the number of an available bag.

Removing a Bag

To remove a bag:

1. Select **Options** ••• next to bag you want to remove.



2. Select **Remove Bag**. If the bag contains items they are assigned to the bag above on the screen.

Signing in to Handout Manager

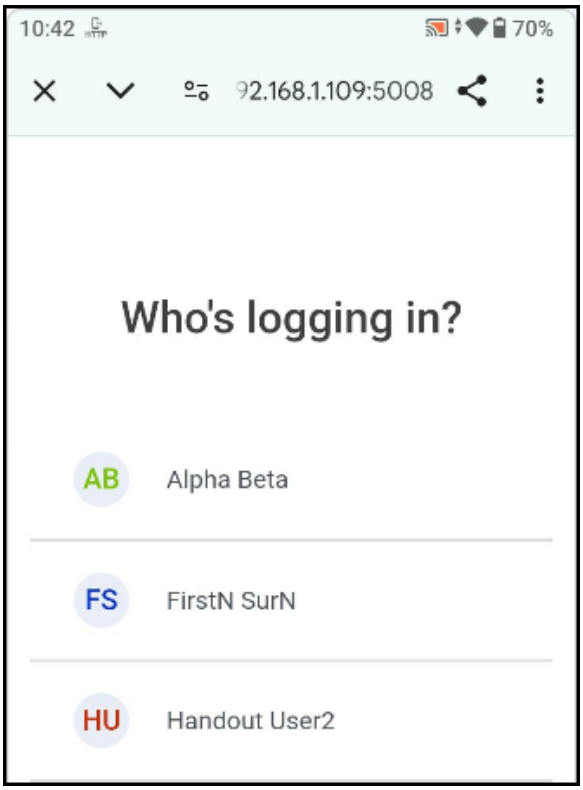
To sign in to **Handout Manager**:

1. Sign in to your **Handout Manager** hand held device using the screen lock PIN.
2. Open **Handout Manager**

from the desktop.
3. From the **Please Sign In** screen, select **SIGN IN**

.

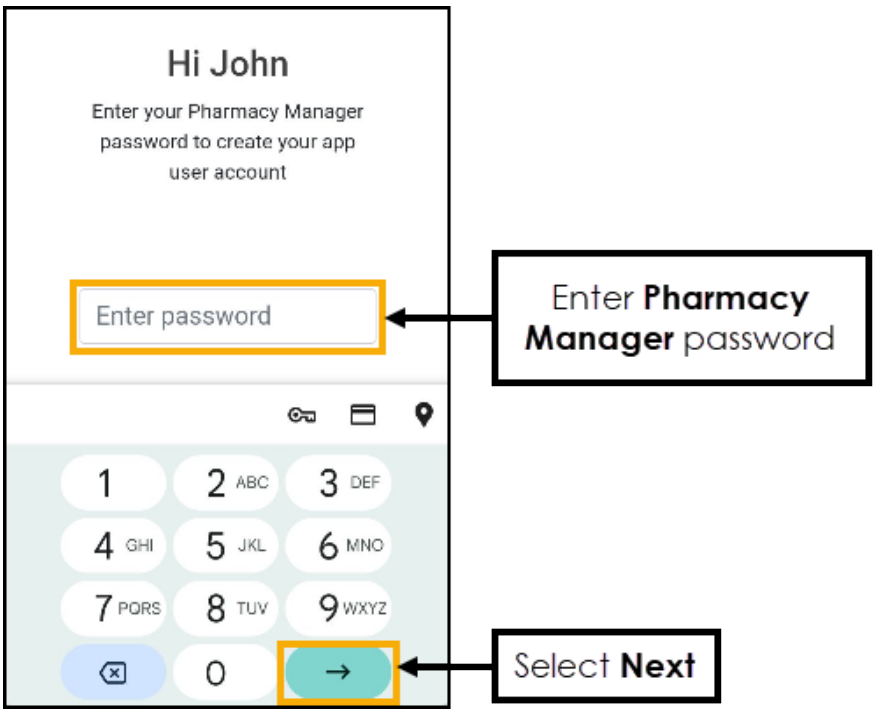
4. The **Who's logging in** screen displays, select from the list of available users.



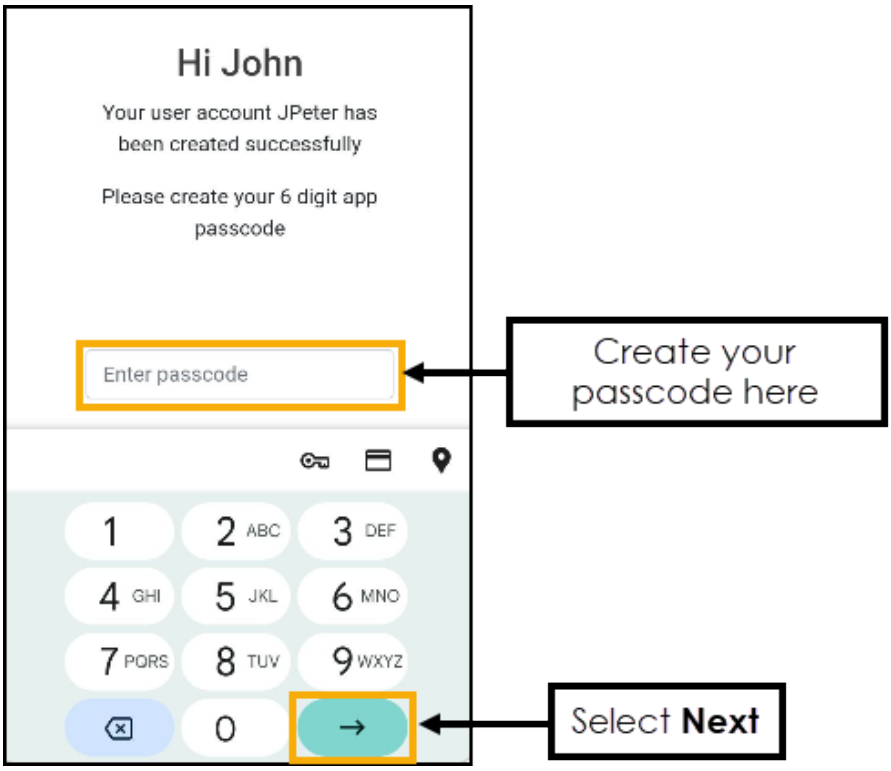
Only users with **Handout Manager** permissions in **Pharmacy Manager** display in this list. See Creating Device User Accounts on page 9 for details.

5. The first time you sign in you must do the following:

a. Enter your **Pharmacy Manager** password and select **Next** →.

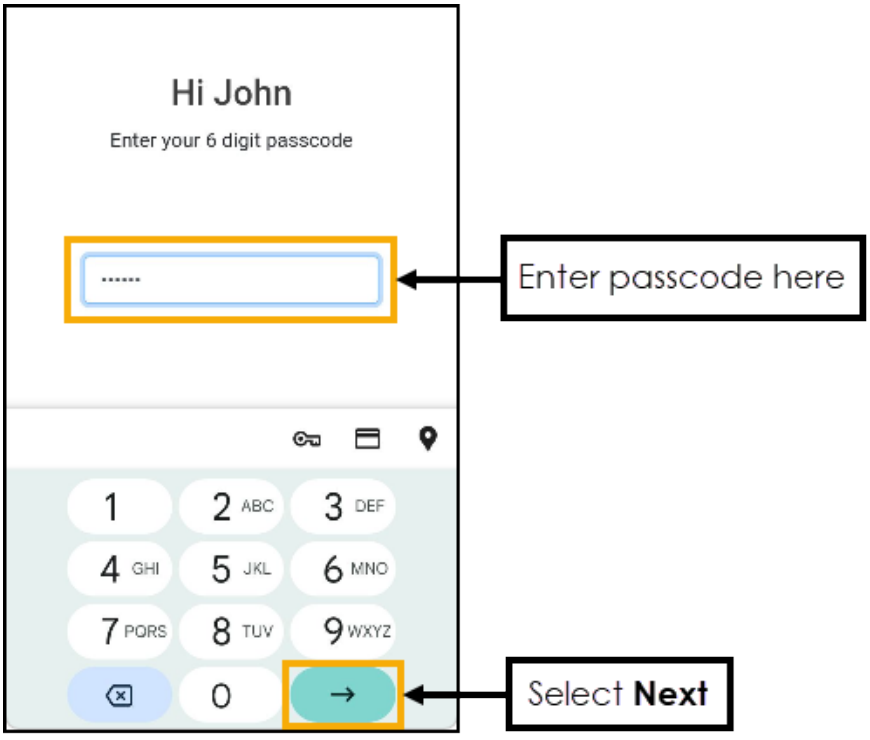


b. Create a 6-digit app passcode and select **Next** →.

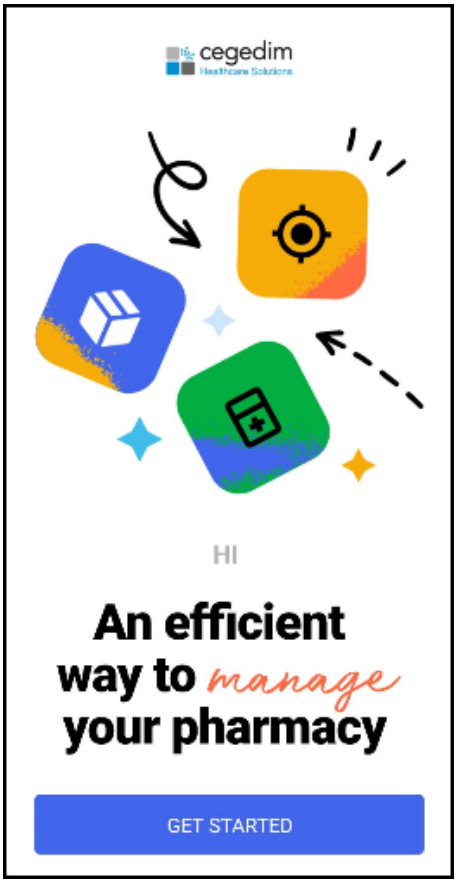


c. The **Passcode updated successfully** screen displays, select **Login** Login.

6. Enter your passcode and select **Next** →.



7. The **Getting Started** screen displays.



Select **GET STARTED** GET STARTED to do the following:

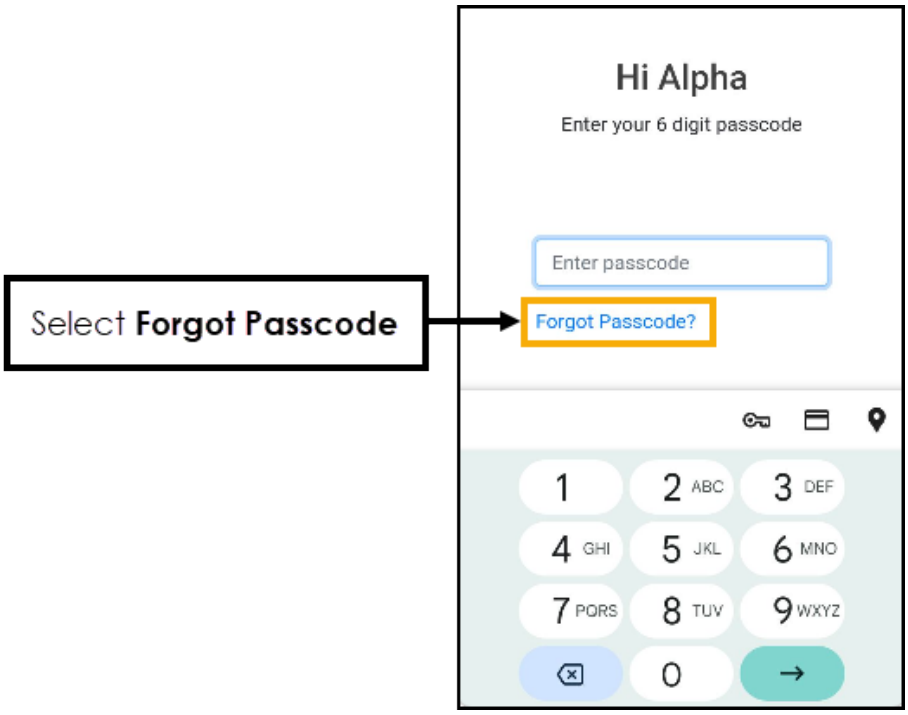
- Assign a bag to a location, see Assigning Bags to Locations on page 45 for details.
- Handout bags, see Handing out Bags on page 50 for details.

Forgot your Passcode?

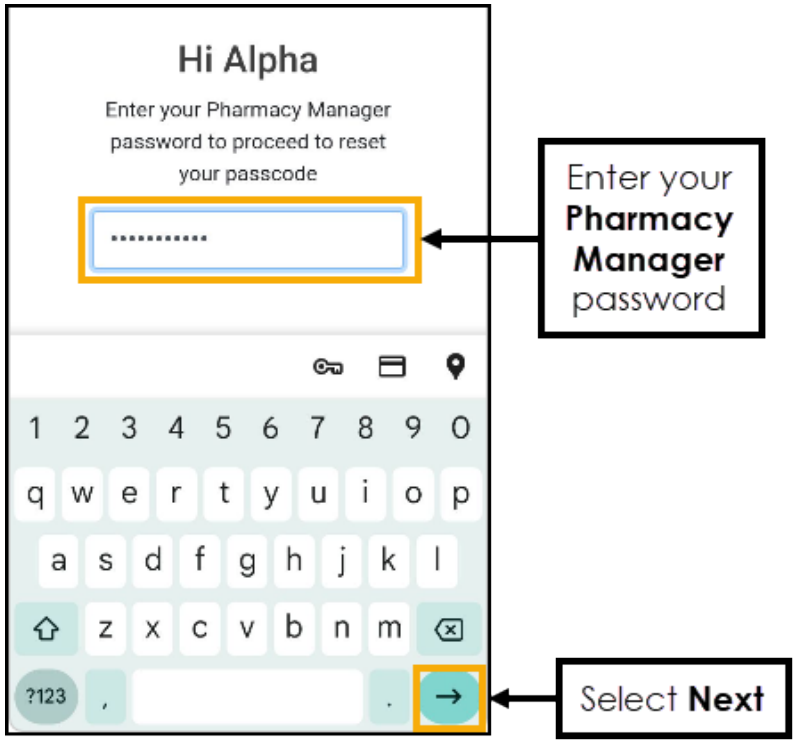
If you forget your passcode, use the following instructions to create a new passcode:

Note - You can only change your passcode after entering your **Pharmacy Manager** password.

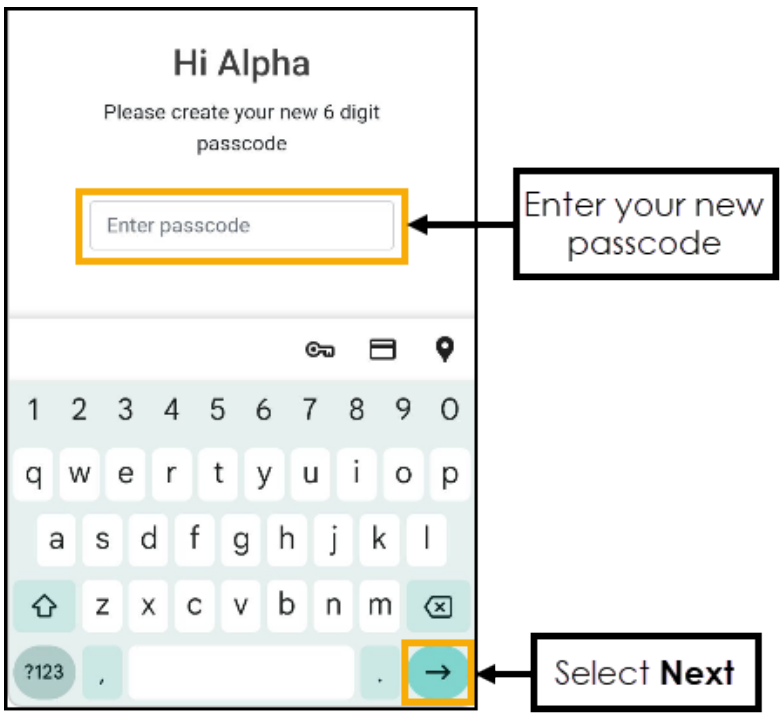
1. From the **Enter your 6 digit passcode** screen, select **Forgot Password**.



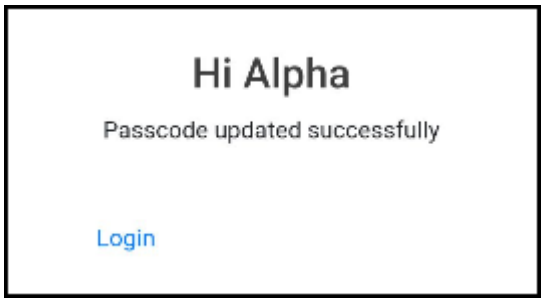
2. Enter your **Pharmacy Manager** password and select **Next** →.



3. Enter a new 6 digit passcode and select **Next** →.



4. The **Passcode updated successfully** screen displays, select **Login** Login to continue.



Assigning Bags to Locations

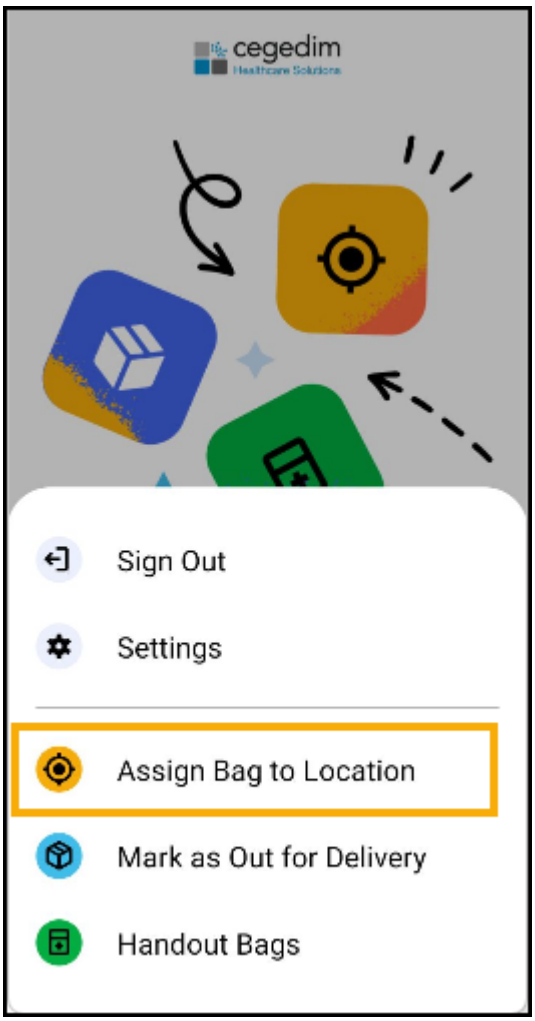
When the prescription is bagged up and ready to go on a shelf you can now assign it a location at the pharmacy.

Locations can be shelves, fridges or Controlled Drug cabinets, to manage your locations, see Location Management on page 18 for details.

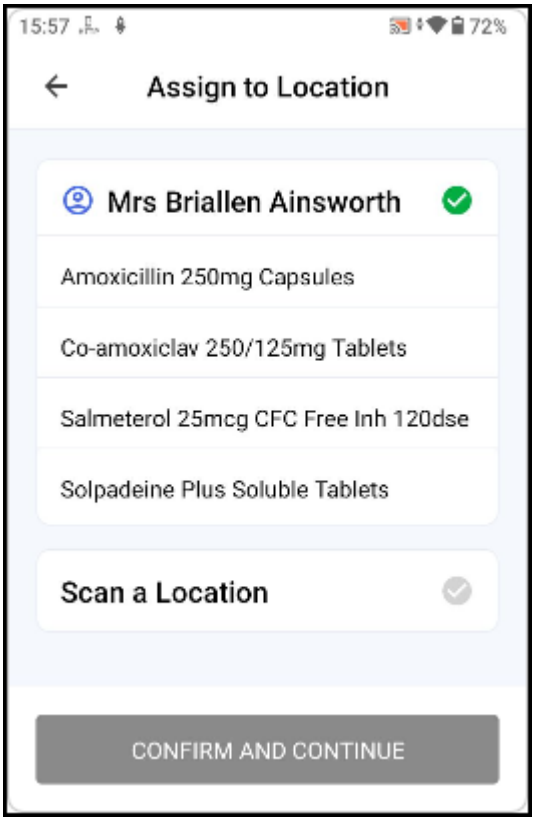
1. Sign in to your **Handout Manager** hand held device using the screen lock PIN.
2. Select your sign-in from the list provided and enter your six digit passcode.
3. Select **GET STARTED** GET STARTED.

4. Select **Assign Bag to Location**

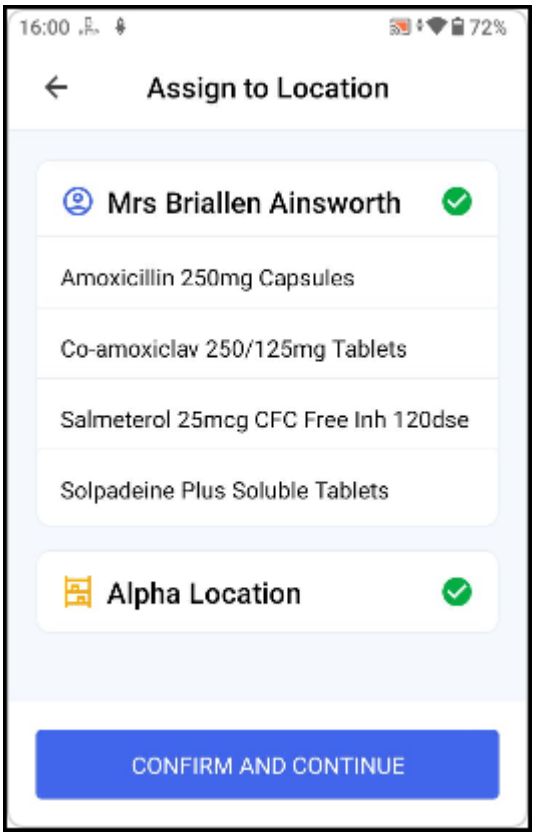
.



5. Scan the bag label, the patient's name and the items in the bag display.

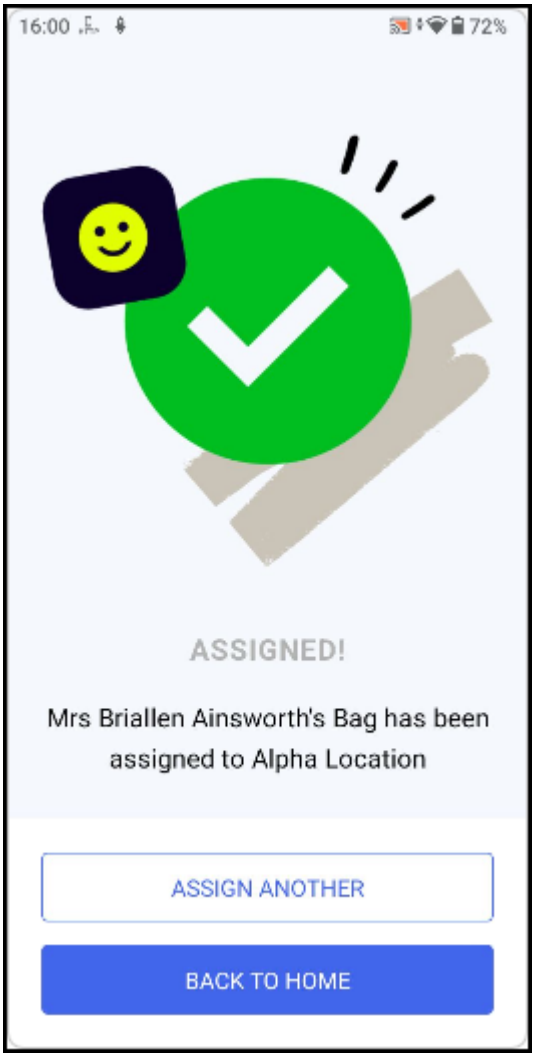


6. Scan the location label, the location name displays.



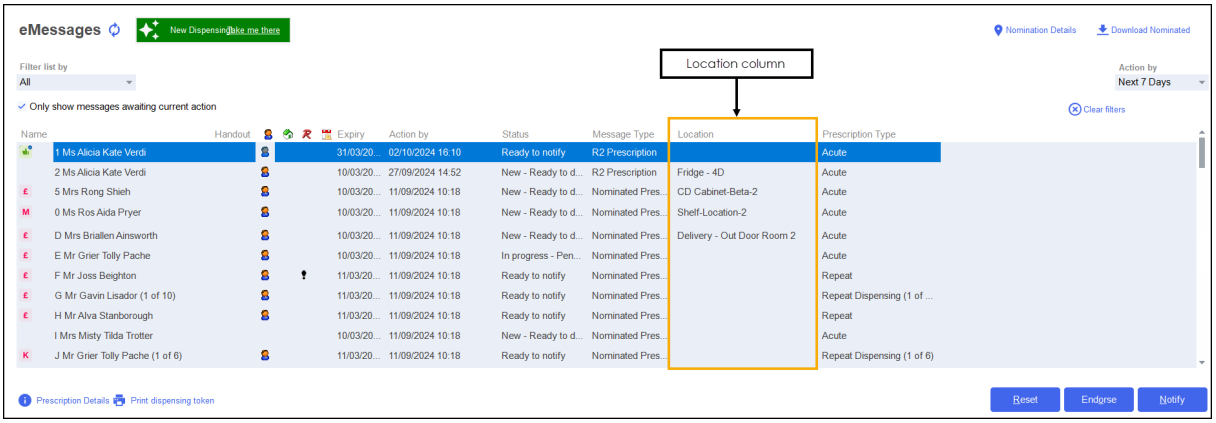
7. Select **CONFIRM AND CONTINUE** CONFIRM AND CONTINUE.

8. To assign another bag, select **ASSIGN ANOTHER** ASSIGN ANOTHER and repeat the process above.



9. Once you are finished assigning bags to locations, select **BACK TO HOME** BACK TO HOME to return to the home screen.

The **Location** column on the **eMessages** screen displays the location of the bag.



Note - In the case of multiple locations, they display as **Shelf 1**, **Fridge 2**.

Handing out Bags

When a patient comes to collect their prescription you can easily locate and hand out their prescription using **Handout Manager**.

> **Note** - If **Handout Manager** is unavailable you can still mark prescriptions as collected as per existing functionality in **Pharmacy Manager**. This completes the handout process.

To hand out a bag:

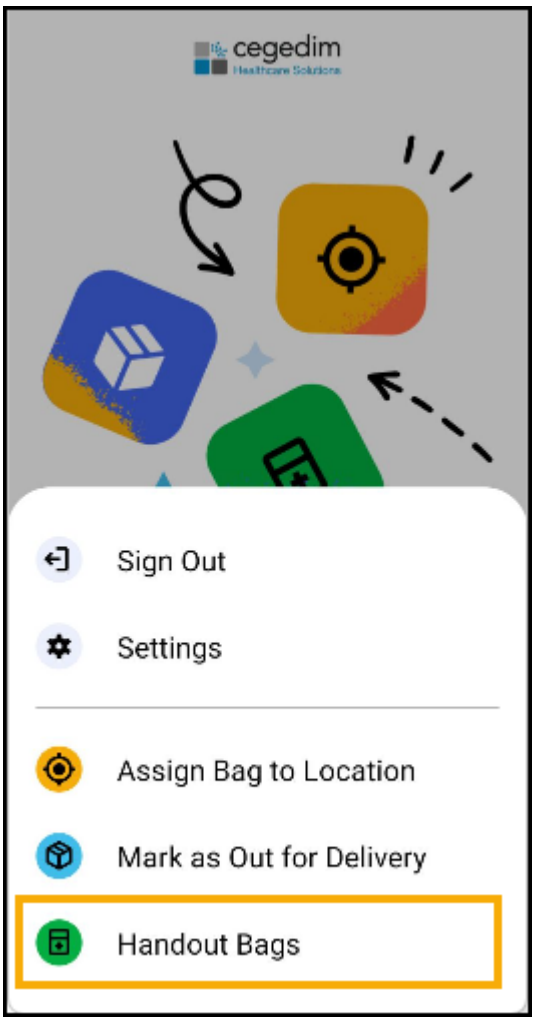
1. Sign in to your **Handout Manager** hand held device using the screen lock PIN.

2. Select your sign-in from the list provided and enter your six digit passcode.

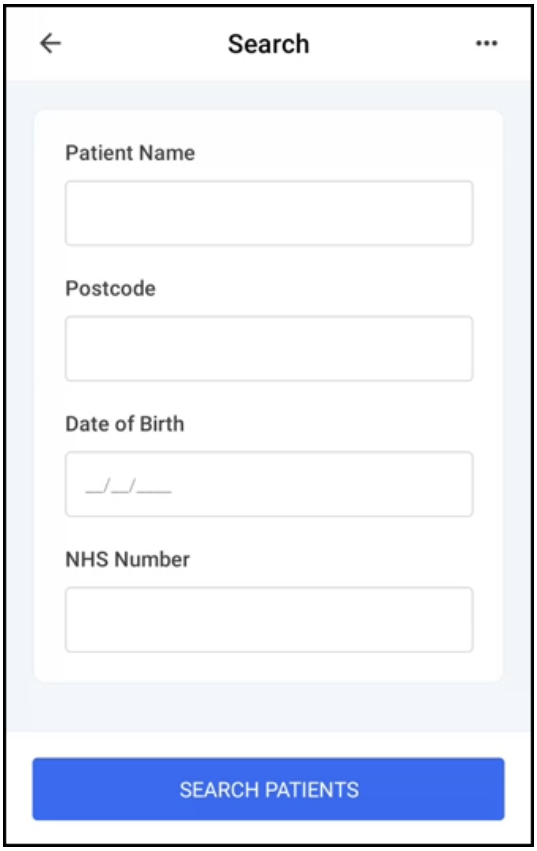
3. Select **GET STARTED** GET STARTED.

4. Select **Handout Bags**

.



5. The **Search** screen displays.

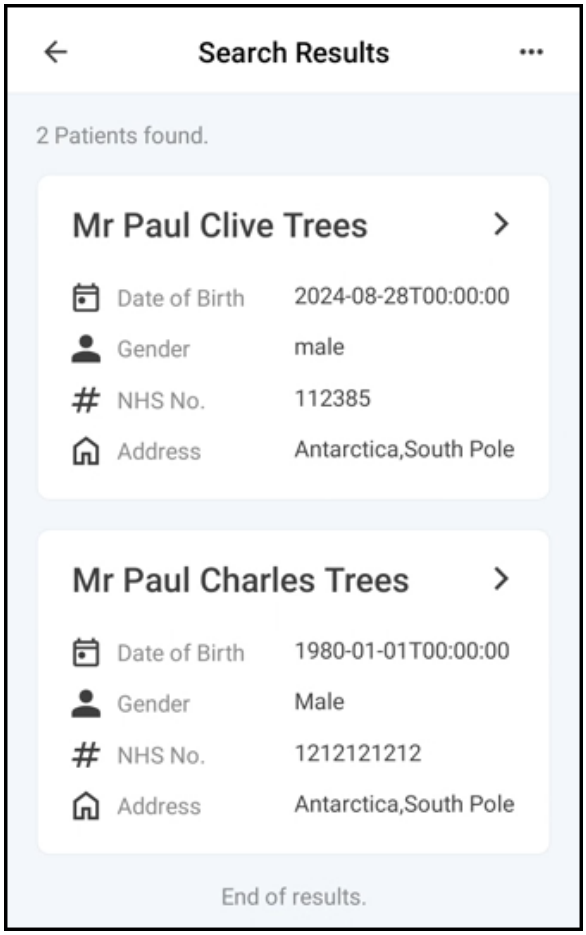


Enter any of the following criteria:

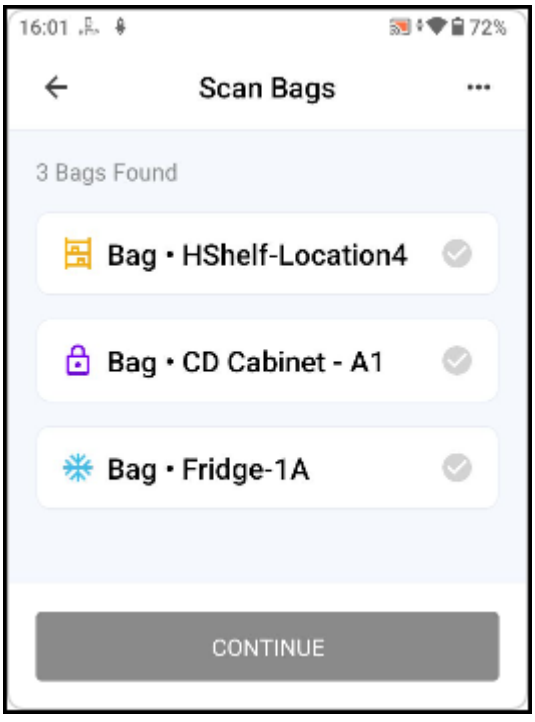
- Patient Name
- Postcode
- Date of Birth
- NHS Number

6. Select **SEARCH PATIENTS**

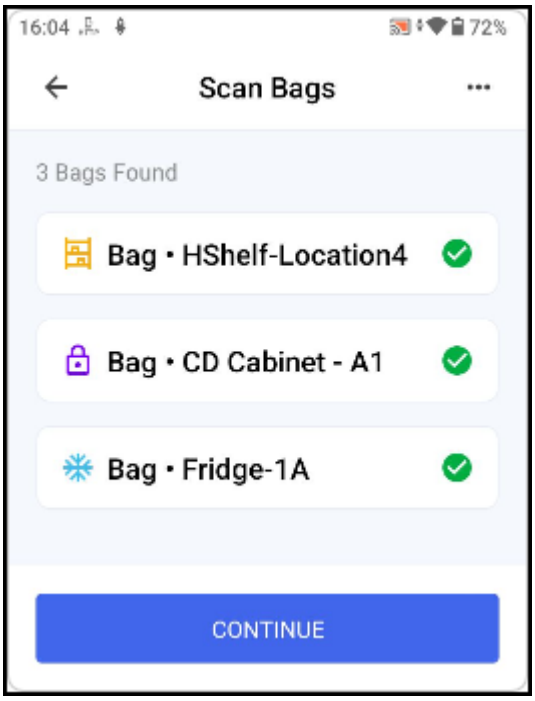
.
7. The **Search Results** screen displays matching patients that have a bag awaiting handout or is awaiting to be assigned a shelf, select to confirm the correct patient.



8. The **Scan Bags** screen displays the patient's uncollected bags.



9. Locate and scan the bag labels. A green tick displays next to the scanned bags.

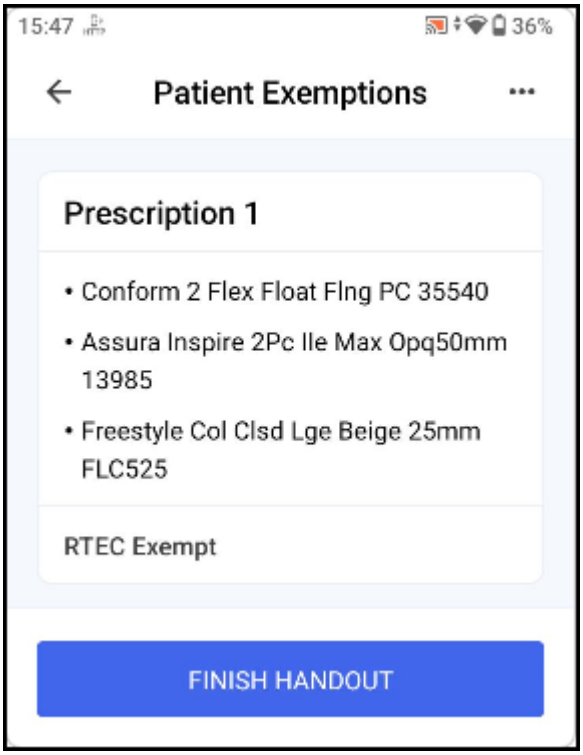


10. Once all bags are scanned, select **CONTINUE** CONTINUE.

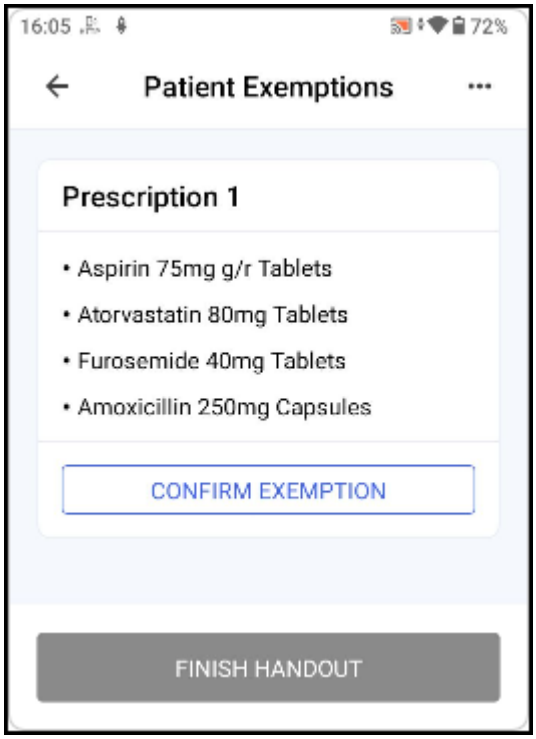
> **Note** - You cannot select **CONTINUE** until all bags are scanned.

> **Note** - If you leave this screen and return, you must scan the bags again.

11. If an Electronic Prescription Service (EPS) prescription is being handed out the **Patient Exemptions** screen displays:
    - If, after Real Time Exemption Checking (RTEC), the patient is exempt you are advised that they are **RTEC Exempt**, select **FINISH HANDOUT** FINISH HANDOUT.



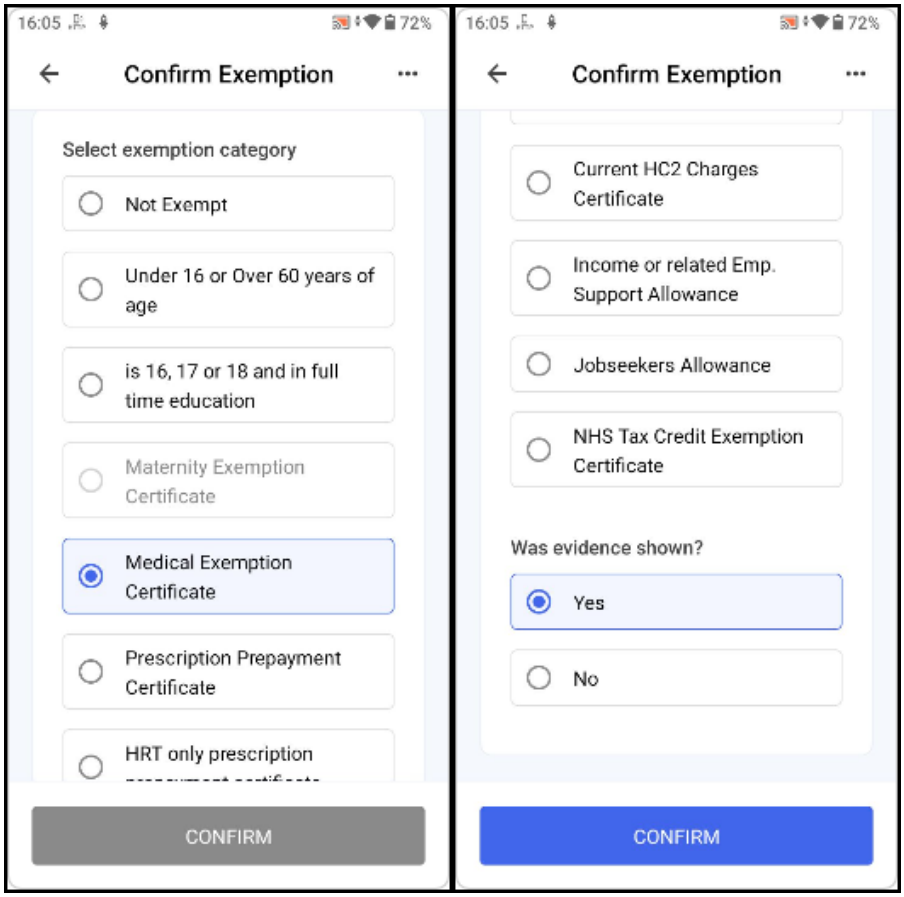
- If, after RTEC, the patient is not exempt you are required to confirm the exemption status. This screen displays for each individual prescription so may display multiple times.



To confirm exemptions or set as not exempt:

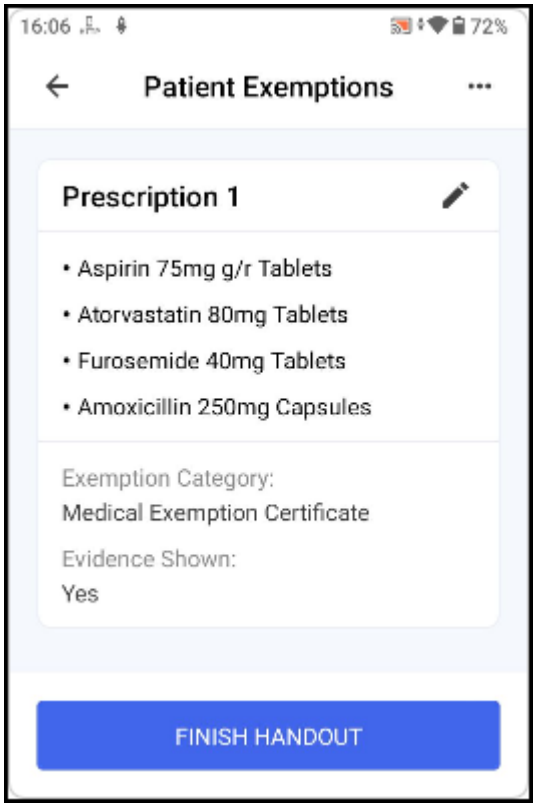
a. Select **CONFIRM EXEMPTION** CONFIRM EXEMPTION.

b. Select the correct exemption category from the list and if the evidence was provided. Select **CONFIRM** CONFIRM to continue.



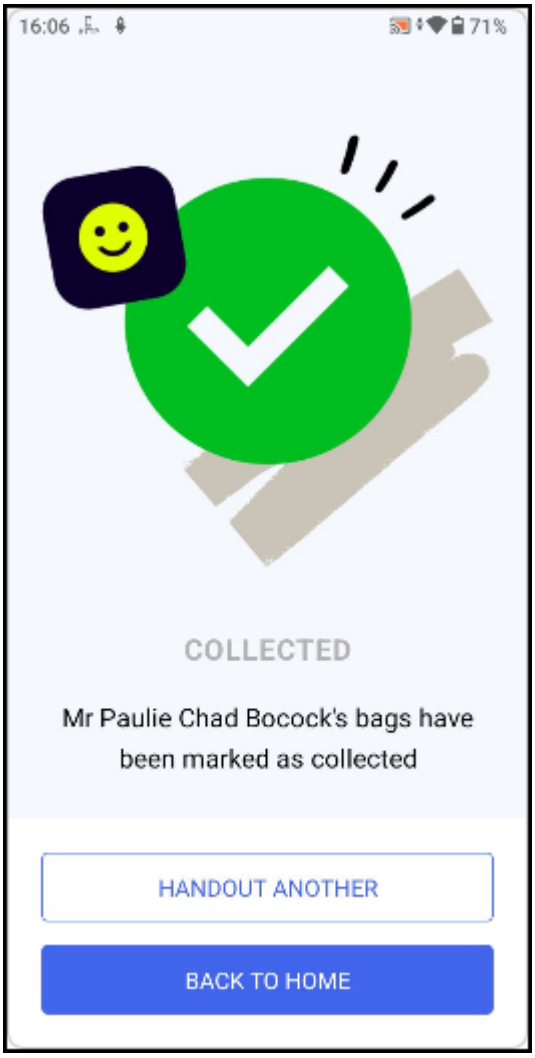
Note - **Was evidence shown** is not required if the patient is not exempt.

c. The **Patient Exemptions** screen displays detailing the selected exemption category.



Select **FINISH HANDOUT** FINISH HANDOUT.

12. The **Collected** screen displays, either select **HANDOUT ANOTHER** HANDOUT ANOTHER to continue to hand out bags, or once you are finished select **BACK TO HOME** BACK TO HOME to return to the home screen.



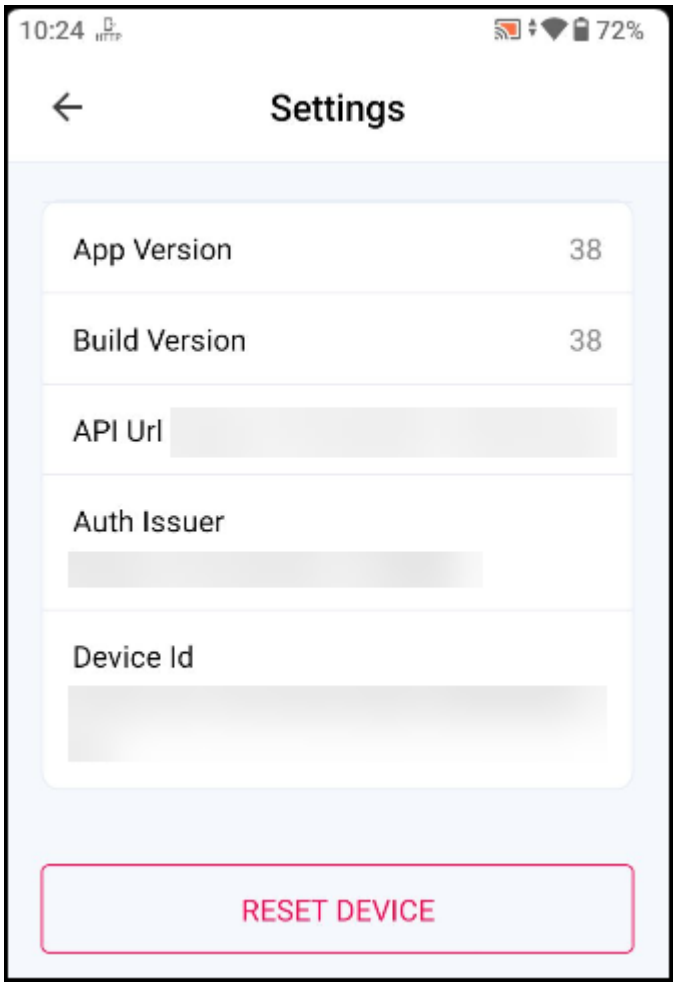
Electronic prescriptions display on the **eMessages** screen with a status of **Ready to notify**.

FAQs

Handout Manager

Can I transfer a device to be used at a different branch?

Yes, from the **Settings** screen on the device, select **RESET DEVICE**.



In order to use **Handout Manager** again the device needs to be re-registered with **Pharmacy Manager**. See Handout Manager Settings for details.