

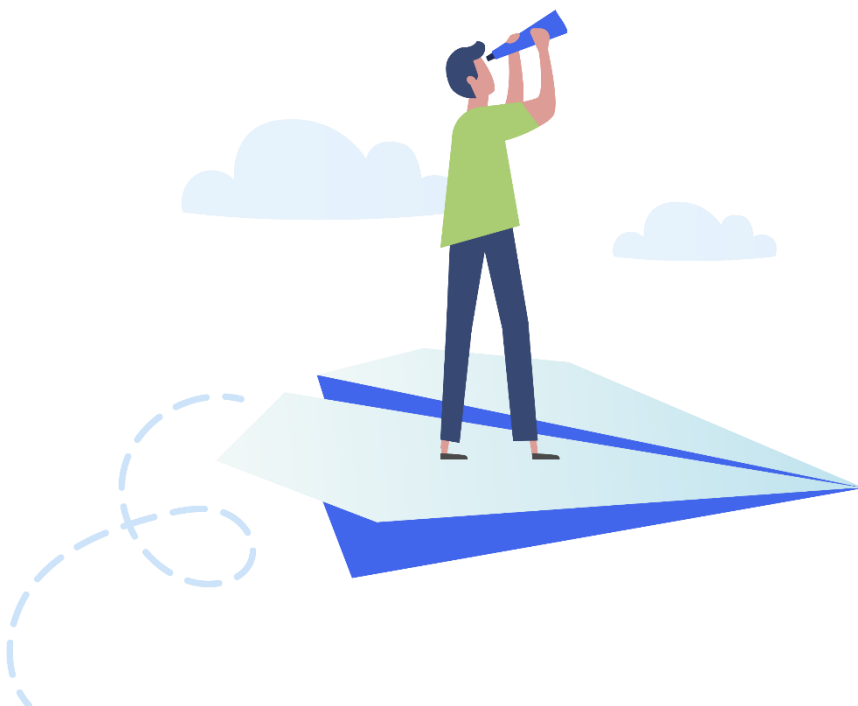


Pharmacy  
**Manager**

# Pharmacy Manager Getting Started Guide Scotland (PM15.6)

Version 1.4

20 September 2023



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## Logging into Pharmacy Manager

To log into **Pharmacy Manager**:

1. From your computer, either:

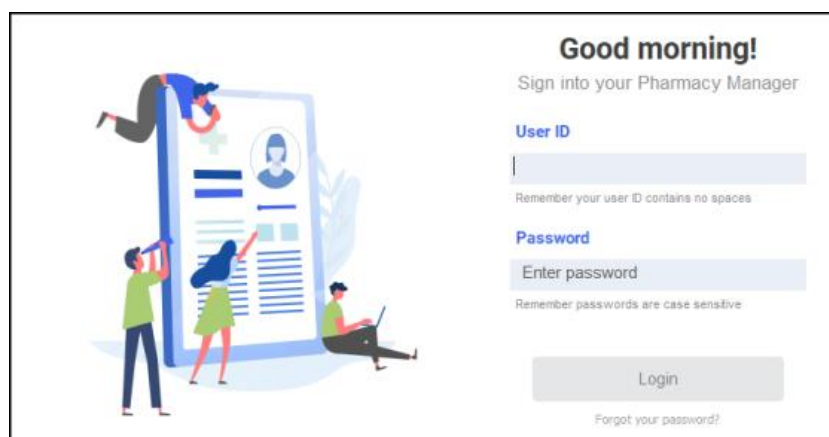


- Double click **Pharmacy Manager** on your desktop, or



- Select **Windows** and then **Pharmacy Manager** from the available list of programs.

2. The log in screen displays, enter your **User ID** and **Password**:



**Good morning!**  
Sign into your Pharmacy Manager

**User ID**  
  
Remember your user ID contains no spaces

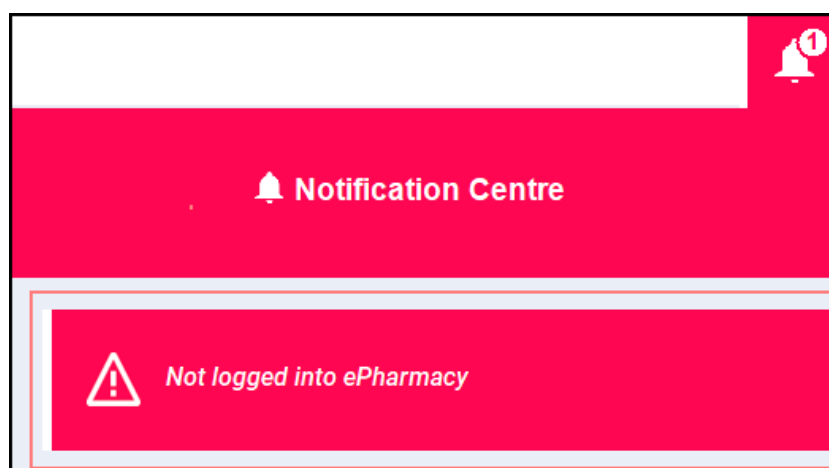
**Password**  
  
Remember passwords are case sensitive

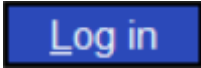
Login

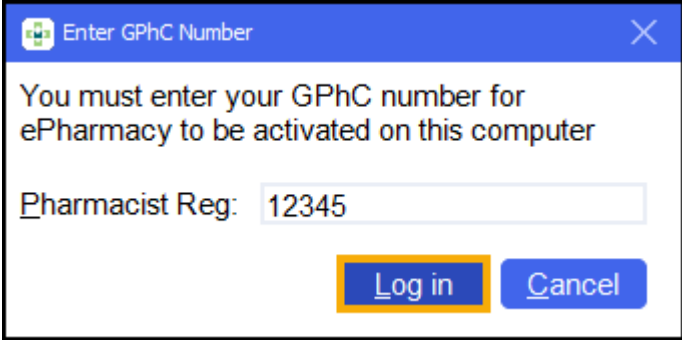
[Forgot your password?](#)

3. Select **Login** .

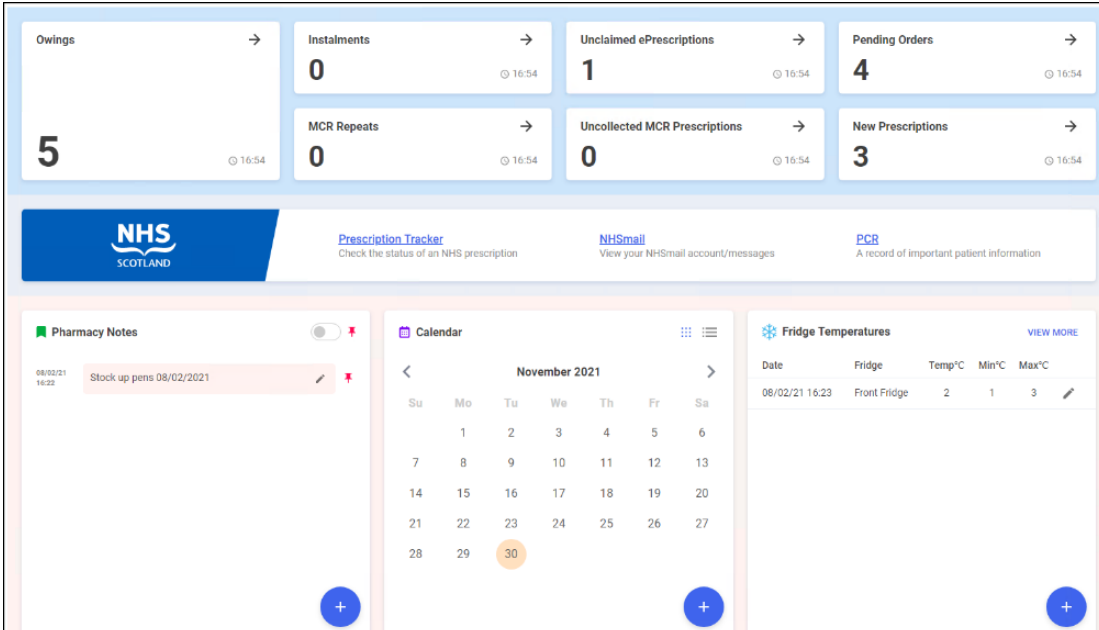
4. The **Pharmacy Manager Notification Centre** displays. Double click the **Not logged into ePharmacy** notification:



5. The **Enter GPhC Number** screen displays. Enter the **GPhC number** of the pharmacist on duty and select **Log in** :



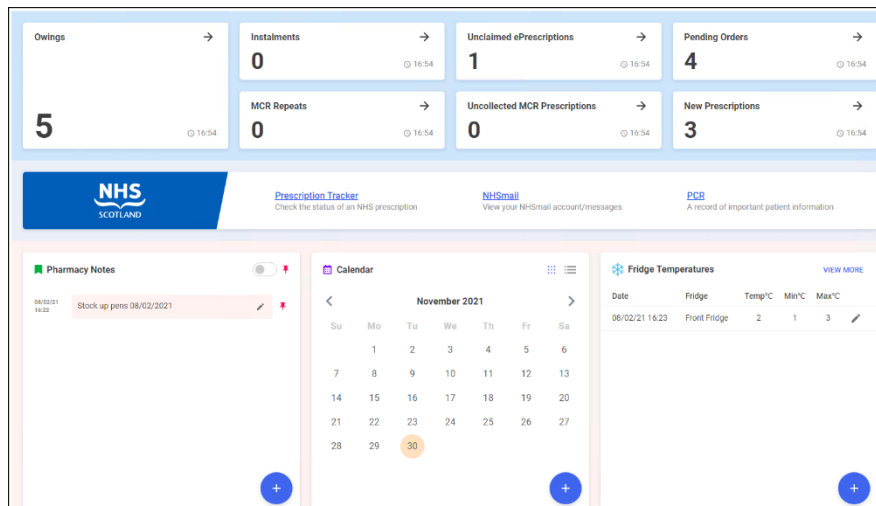
The **Pharmacy Manager Dashboard** displays:



Date	Fridge	Temp°C	Min°C	Max°C
08/02/21 16:23	Front Fridge	2	1	3

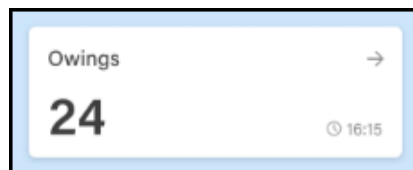
# Navigating the Pharmacy Manager Dashboard

When you log into **Pharmacy Manager**, the **Pharmacy Manager Intelligent Dashboard** displays:



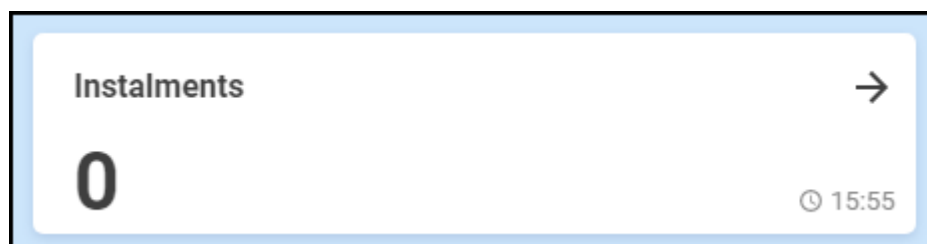
The dashboard displays dynamic tiles, giving you a real time overview of your pharmacy workload. The Dashboard consists of the following files:

## Owings



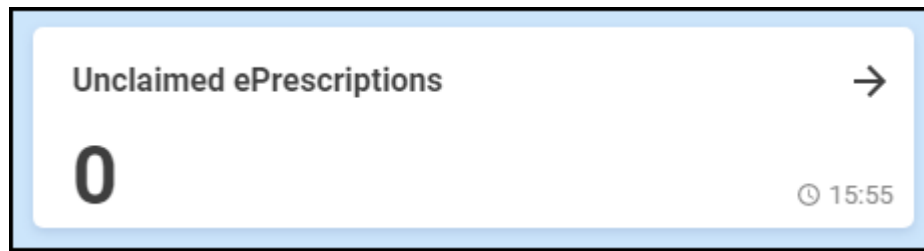
The **Owings** tile displays the number of items owing, select the tile to display your **Owings** screen.

## Instalments



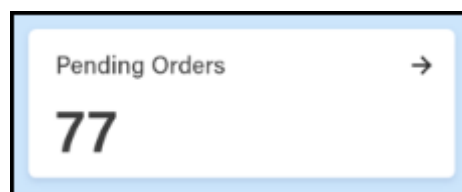
The **Instalments** tile displays the number of instalments due today, select the tile to display your **Instalments** screen.

## Unclaimed ePrescriptions



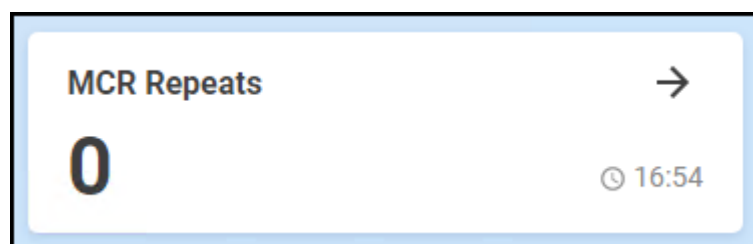
The **Unclaimed ePrescriptions** tile displays the number of dispensed prescriptions which have not been claimed. Select the tile to display your **eMessages** screen with the **All unclaimed prescriptions** filter applied.

## Pending Orders



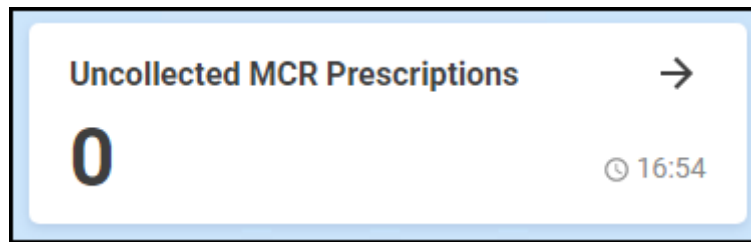
The **Pending Orders** tile displays the number of items on outstanding orders, select the tile to display your **Ordering** screen.

## MCR Repeats



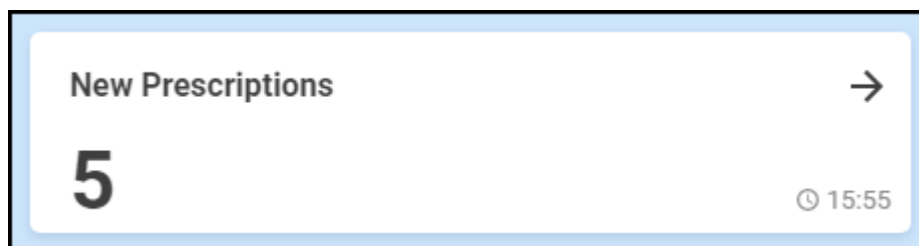
The **MCR Repeats** tile displays the number of Medicines: Care & Review (MCR) repeats due to be dispensed over the next week. Select the tile to show the repeats screen with a one week date filter applied.

## Uncollected MCR Prescriptions



The **Uncollected MCR Prescriptions** tile displays the number of dispensed prescriptions which have not been collected. Select the tile to show the **Pending** screen with **Not collected** filter applied.

## New Prescriptions



The **New Prescriptions** tile displays the number of prescriptions which have been scanned but not dispensed. Select the tile to show the **eMessages** screen with a **New prescriptions** filter applied.

## NHS Scotland

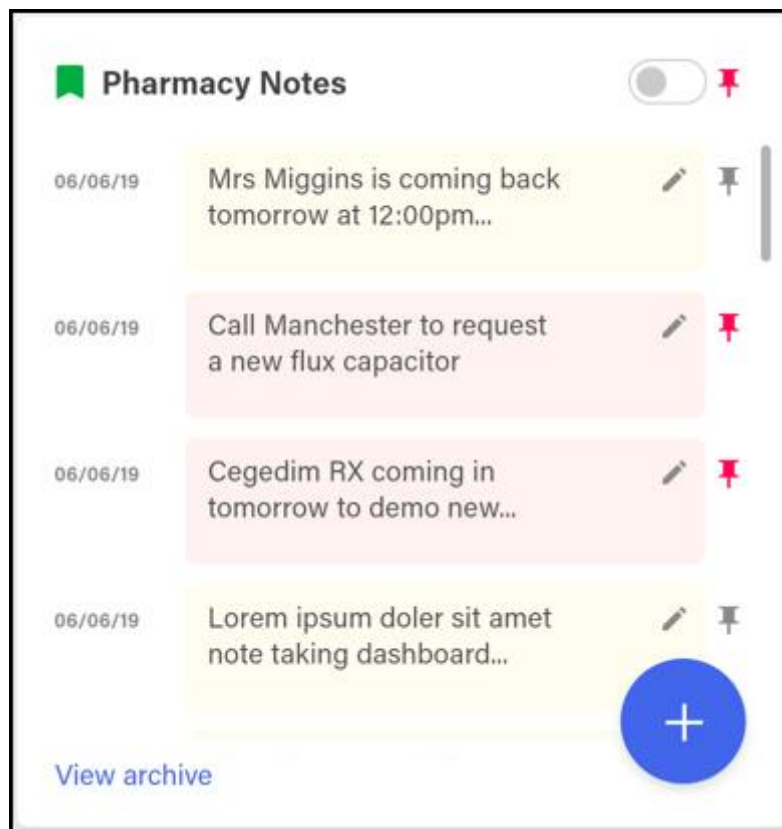


The **NHS Scotland** tile displays the following links for your convenience:

- **Prescription Tracker** - Select to look up information about an electronic prescription.
- **NHSmail** - Select to access your NHS mail log in.
- **PCR** - Select to access the Pharmacy Care Record.

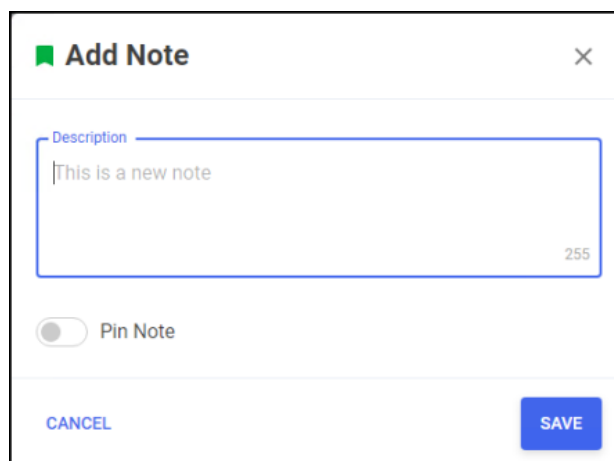


## Pharmacy Notes



The **Pharmacy Notes** file enables any staff member to add or edit a note on the dashboard. Any member of staff with **Pharmacy Manager** access can:

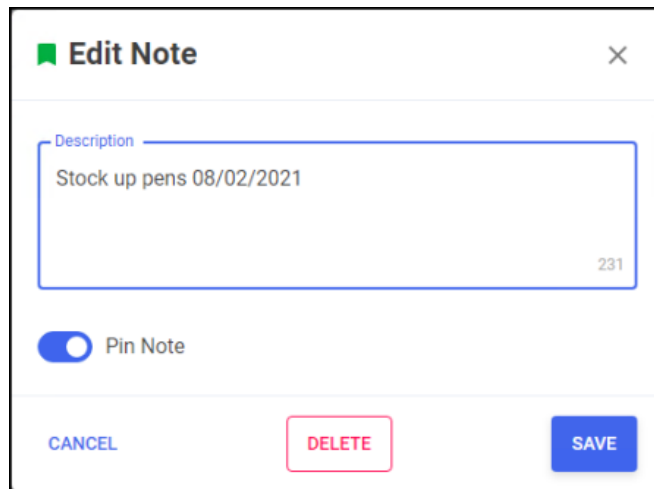
- **Add** - Select **Add** , the **Add Note** screen displays:



Enter your note, select **Pin Note**  to pin the note to the list, if required, and then select **SAVE** .

- **View Pinned Pharmacy Notes Only** - Select the **Pin** toggle  to view pinned notes only.

- **Edit** or **Delete** a note - Select **Edit**  to display the **Edit Note** screen:



Either:

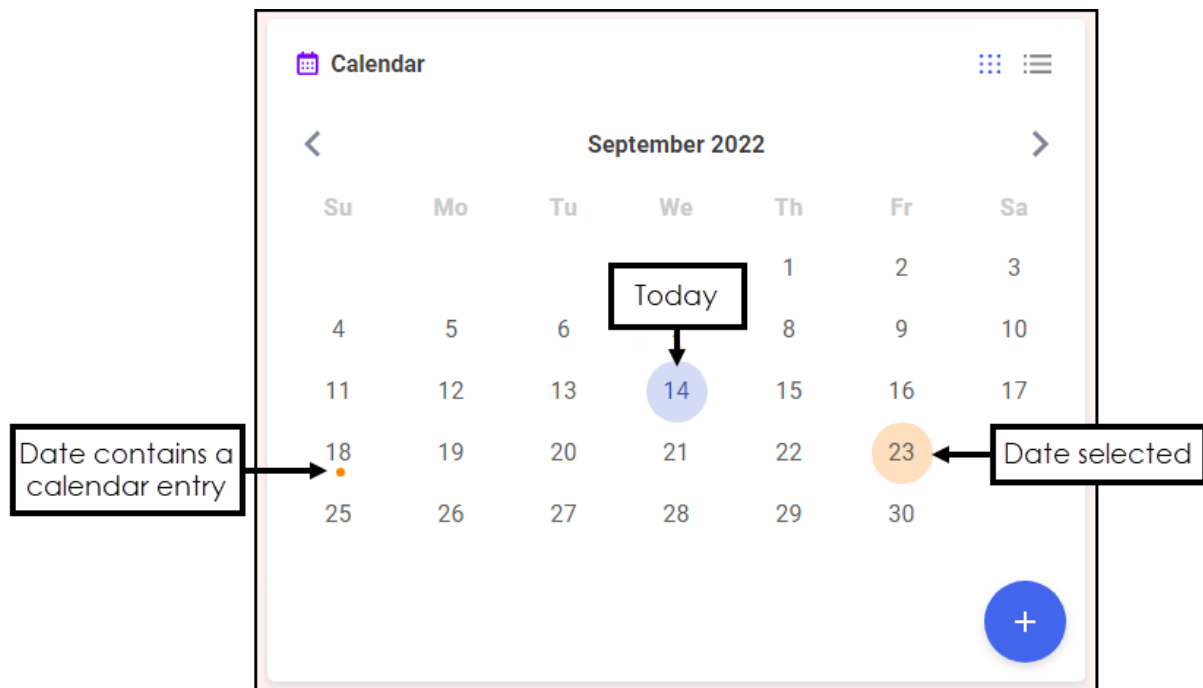
- Edit the **Note** as required and select **SAVE** , or,
- Select **DELETE**  to delete the note.

---







 **Note - Pharmacy Notes** can be seen by all **Pharmacy Manager** users.

---

## Calendar




The **Calendar** tile provides you with a pharmacy wide diary. This can be used for appointments and reminders, any member of staff with **Pharmacy Manager** access can:

- **Add** - Highlight a date, select **Add** , complete the details as required and select **SAVE** .
- **View** - Select the date required and select **Options** , any appointments and reminders for that day display. Select the item required to view the details.
- **Edit - View** an item and then select **Edit**  and update as required.
- **Delete** - To delete a calendar entry, **View** it, select **Edit**  and then select **DELETE** .

---

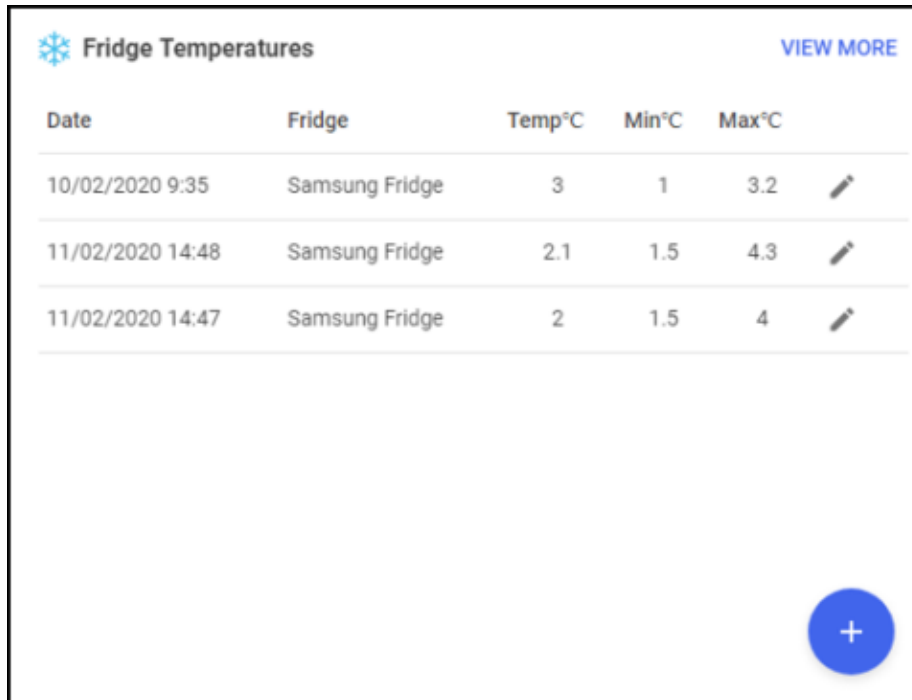
 See [Using the Calendar Tile](#) in the **Pharmacy Manager Help Centre** for details.

---

 **Note - Calendar** items can be seen by all **Pharmacy Manager** users.

---

## Fridge Temperatures

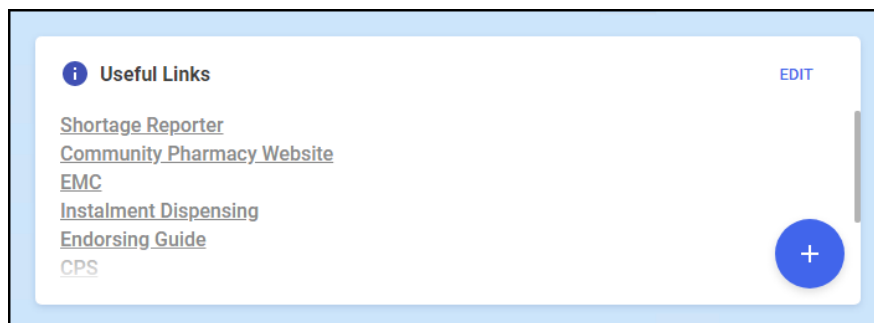


Date	Fridge	Temp°C	Min°C	Max°C
10/02/2020 9:35	Samsung Fridge	3	1	3.2
11/02/2020 14:48	Samsung Fridge	2.1	1.5	4.3
11/02/2020 14:47	Samsung Fridge	2	1.5	4

The **Fridge Temperatures** file displays:

- **Temp** - The current temperature for any fridges selected.
- **Min** - The minimum temperature of any fridges selected on a given day.
- **Max** - The maximum temperature of any fridges selected on a given day.

## Useful Links



Useful Links
<a href="#">Shortage Reporter</a>
<a href="#">Community Pharmacy Website</a>
<a href="#">EMC</a>
<a href="#">Instalment Dispensing</a>
<a href="#">Endorsing Guide</a>
<a href="#">CPS</a>

The **Useful Links** file, managed by your pharmacy, displays links to websites you use. You can add, edit, delete and re-order links as required.



See [Managing Useful Links](#) in the **Pharmacy Manager Help Centre** for details.

## Marketing Tiles

The marketing tiles at the bottom of the **Dashboard** offer information from **Cegedim Healthcare Solutions** and other selected providers of systems that work seamlessly alongside **Pharmacy Manager**.

## Searching for a Patient

To search for a patient in **Pharmacy Manager**:

1. From the **Patient search** bar, enter all or part of the patient name, for example:




- The first name and last name, for example, Billy Black
- The last name, followed by the initial, for example, Black B
- Any part of the surname or first name, for example, Bil Bla

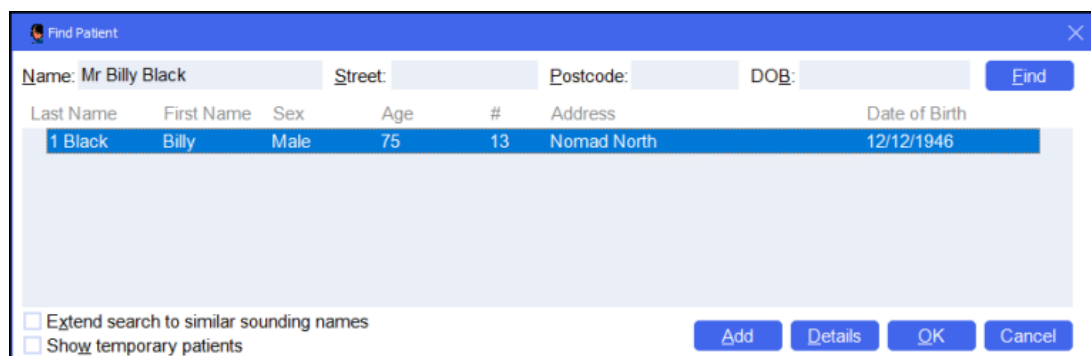


**Training Tip** - You can also search for a patient by entering their CHI number prefixed by #, for example, #0123456789.



**Training Tip** - Leave **Patient** blank to search by address or date of birth.

6. Press **Enter** on your keyboard or select **Search**  and the **Find Patient** screen displays with a list of all available patients that match your criteria:



Find Patient							
Name: Mr Billy Black		Street:	Postcode:	DOB:	Find		
Last Name	First Name	Sex	Age	#	Address	Date of Birth	
1 Black	Billy	Male	75	13	Nomad North	12/12/1946	

Extend search to similar sounding names  
 Show temporary patients

Add Details OK Cancel



**Training Tip** - You can also search by **Street**, **Postcode** and **DOB**. Tick **Extend search to similar sounding names** to display similar names.



**Note** - If the patient does not exist in **Pharmacy Manager**, the name you entered displays in red. Select **Add** to create a new patient record, see [Adding a New Patient](#) on page 14 for details.

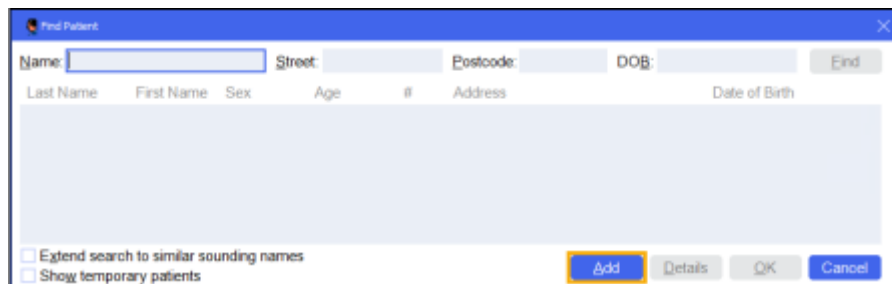
## Adding a New Patient

If a patient does not exist in **Pharmacy Manager**, you can create a new patient record. To add a new patient:

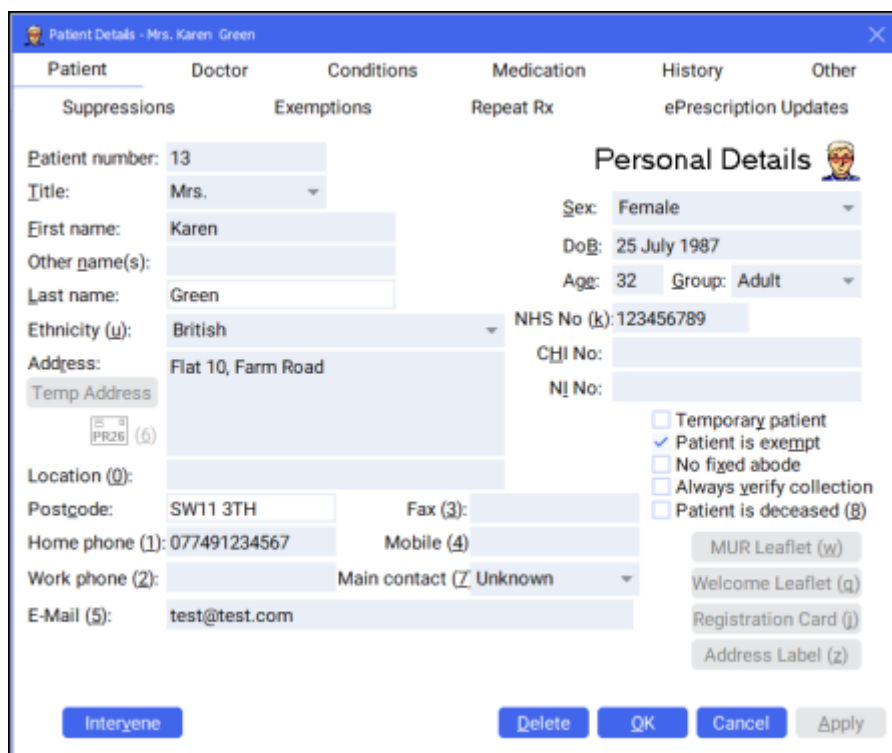
1. From **Pharmacy Manager**, select **Patient** and press **Enter** on your keyboard:



2. The **Find Patient** screen displays, select **Add** :



3. The **Patient Details** screen displays, complete as required:

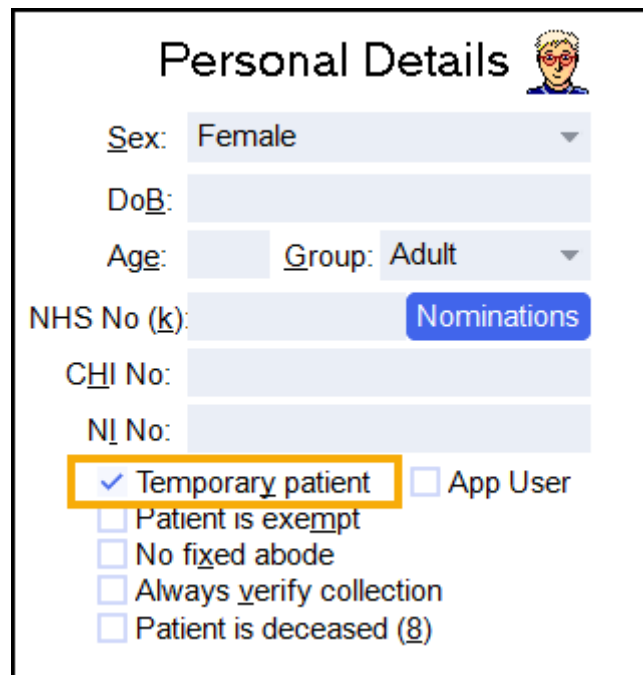




**Training Tip** - Use the **Other** tab to add patient notes as required.

4. Select **OK**  to save and return to the **Find Patient** screen.

## Adding a Temporary Patient

To add a temporary patient, place a tick next to **Temporary patient** on the **Patient Details - Patient** screen:



**Personal Details** 

Sex: Female

DoB:

Age:  Group: Adult

NHS No (k):  [Nominations](#)

CHI No:

NI No:

**Temporary patient**  App User

Patient is exempt

No fixed abode

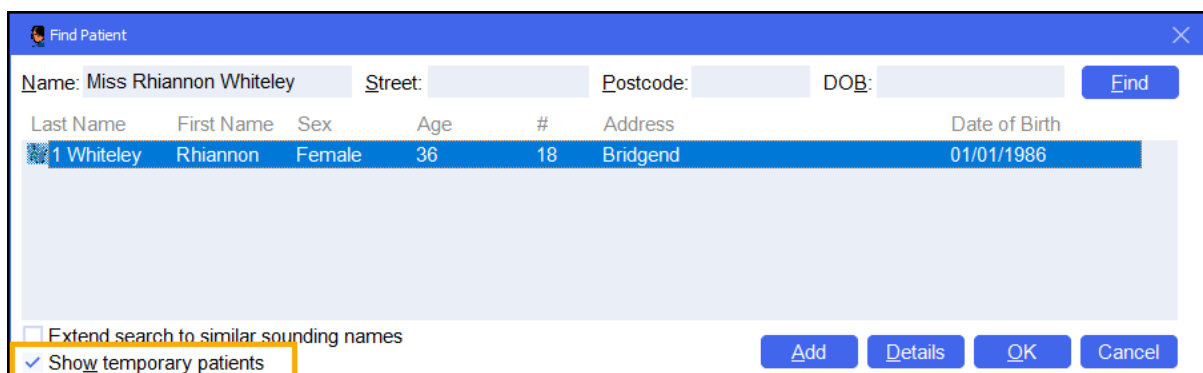
Always verify collection

Patient is deceased (8)

To change a temporary patient to a permanent patient, simply remove the tick next to **Temporary patient** on the **Patient Details - Patient** screen.

## Finding a Temporary Patient

To include temporary patients on the **Find Patient** screen, simply place a tick next to **Show temporary patients**:




**Find Patient** ✕

Name: Miss Rhiannon Whiteley Street:  Postcode:  DOB:  [Find](#)

Last Name	First Name	Sex	Age	#	Address	Date of Birth
1 Whiteley	Rhiannon	Female	36	18	Bridgend	01/01/1986

Extend search to similar sounding names


**Show temporary patients** [Add](#) [Details](#) [OK](#) [Cancel](#)

 **Note** - The system records all dispensing details for temporary patients and therefore reports include temporary patient information. Temporary patients display on reports with an asterisk \* next to their name. Temporary patients display on reports with an asterisk \* next to their name.

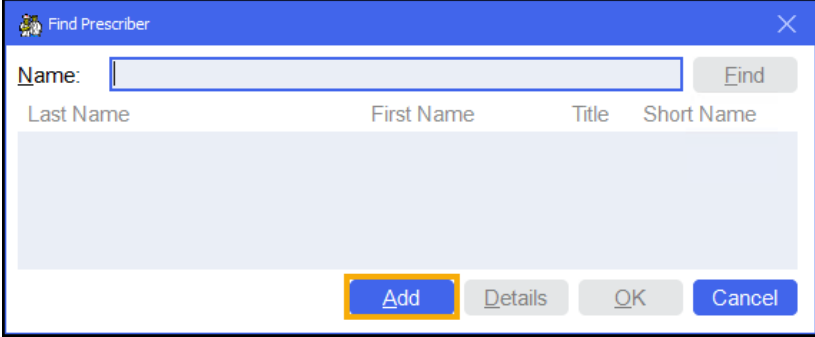
## Adding a New Prescriber

A prescriber is those authorised to issue prescriptions, for example, doctors, nurses and vets. To add a new prescriber:

1. From either:

- The **Dispensary**  screen - With a patient selected, enter the clinician's surname (full or partial) and press **Enter** on your keyboard, or
- From the **Pharmacy Manager Menus** select **Tools - Inquiry - Prescriber**.

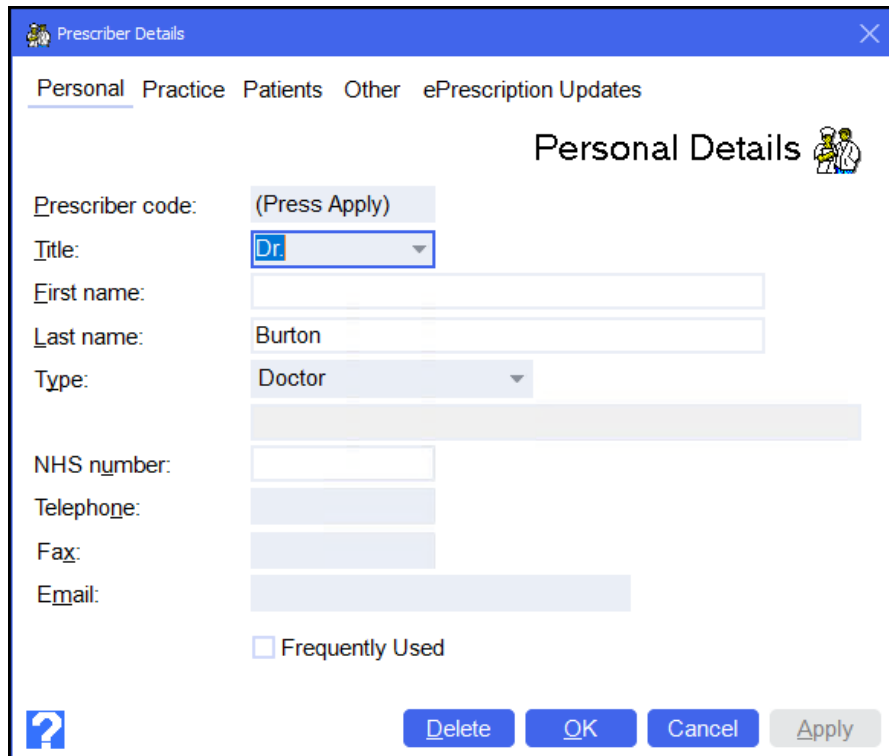
2. The **Find Prescriber** screen displays, select **Add** :



The screenshot shows a dialog box titled "Find Prescriber" with a search field and a list of results. The search field is labeled "Name:" and has a "Find" button to its right. Below the search field, there are four columns: "Last Name", "First Name", "Title", and "Short Name". The list area is currently empty. At the bottom of the dialog, there are four buttons: "Add", "Details", "OK", and "Cancel". The "Add" button is highlighted with a yellow border.



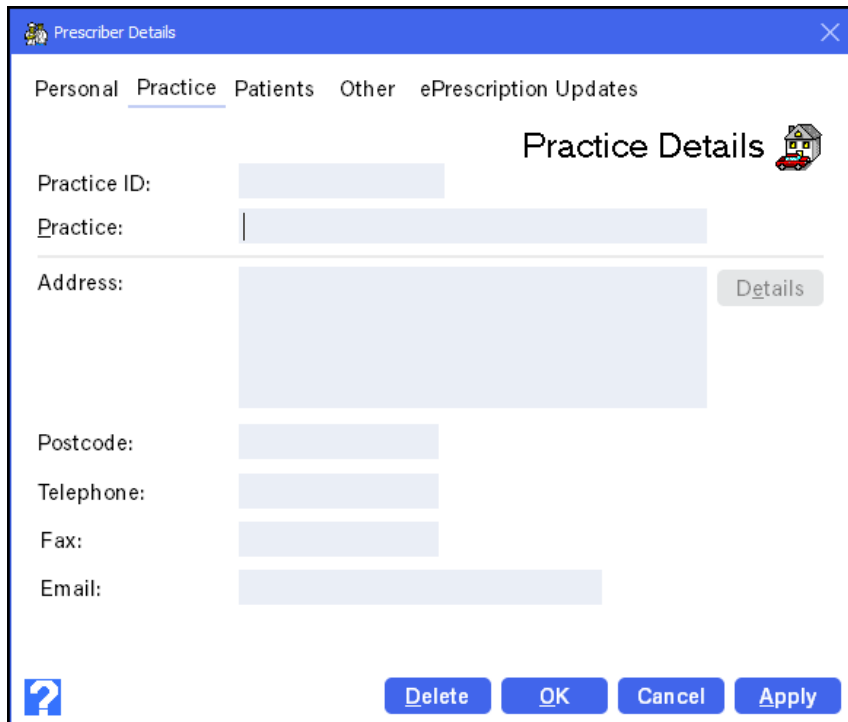
3. The **Prescriber Details** screen displays:



Complete as appropriate:


- **Title**
- **First name**
- **Last name**
- **Type** - Select the prescriber type from the list. If you select **Other (Please specify)**, an additional text box activates, manually enter the prescriber type.
- **NHS/Registration No**
- **Telephone**
- **Fax**
- **Email**
- **Frequently Used** - Tick to enable.

4. Select the **Practice** tab:



Prescriber Details

Personal Practice Patients Other ePrescription Updates

Practice Details 

Practice ID:

Practice:

Address:

Postcode:

Telephone:

Fax:

Email:

Complete as appropriate:

- **Practice ID**
- **Practice**
- **Address**
- **Postcode** - The postcode must be in the correct format, for example, AB12 3CD.
- **Telephone**
- **Fax**
- **Email**

5. Select **OK**  to add the prescriber.

## Downloading prescriptions from the ePharmacy Store

To download a prescription from the **ePharmacy Message Store (eStore)**:

1. From the **Pharmacy Manager Side Navigation Bar** select **eMessages**

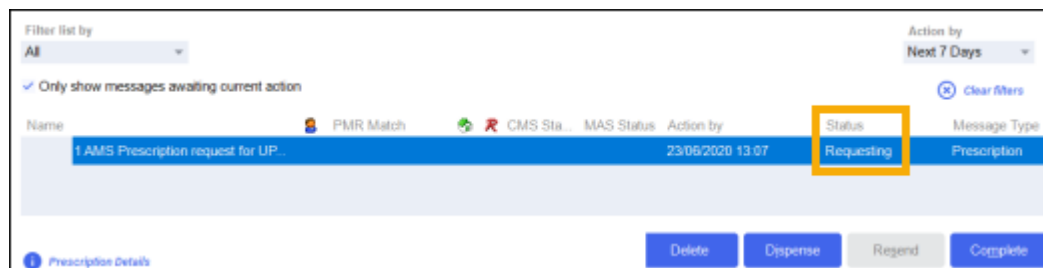


. The **eMessages** screen displays.

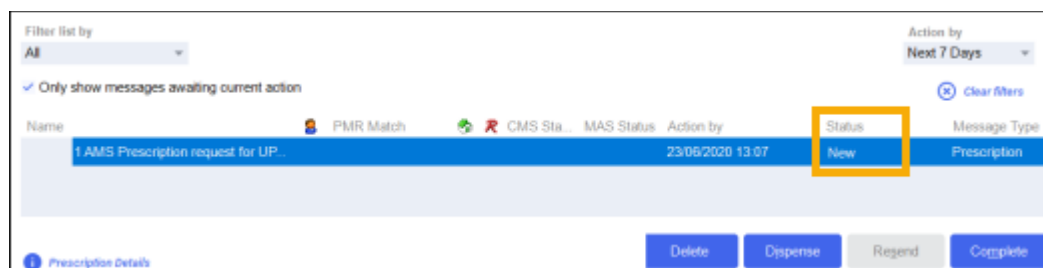
2. Within **Filter list by**, select **All**:



3. Scan the barcode on the prescription. The prescription downloads from the eStore.
4. The status displays as **Requesting** while the prescription download is in progress:

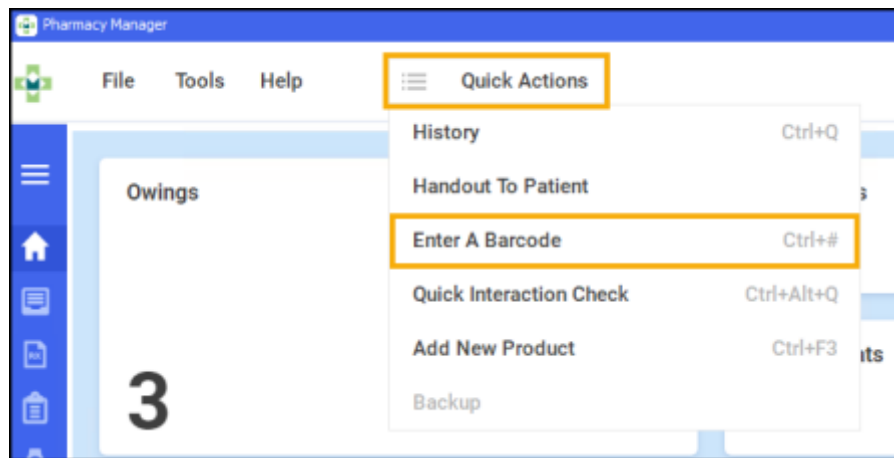



5. Once the prescription download is complete, the status changes to **New**:

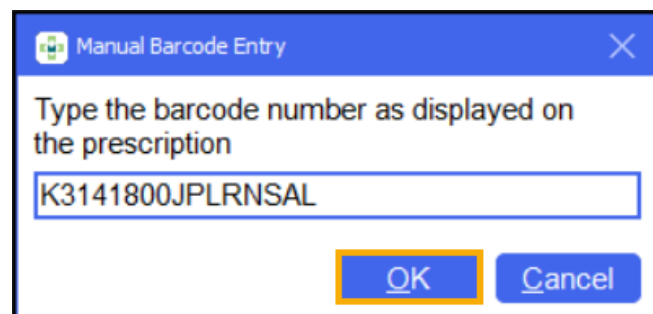


If you are unable to scan the barcode on the prescription, you can enter the barcode manually:

1. Select **Quick Actions - Enter A Barcode**:



2. The **Manual Barcode Entry** screen displays. Enter the Unique Prescription Number (UPN) number from the prescription and select **OK** :




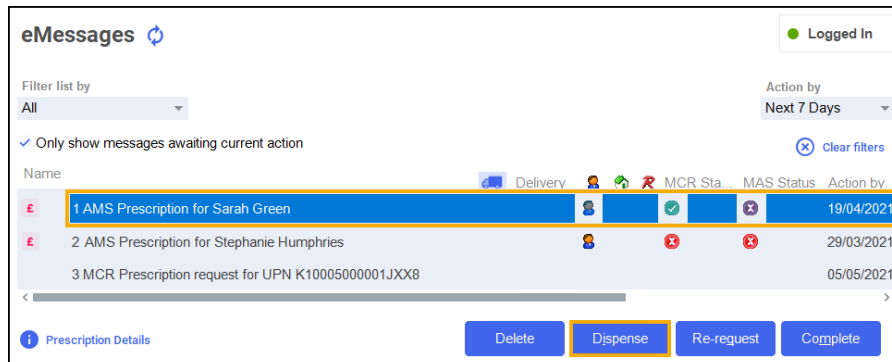
# Dispensing, Endorsing and Claiming an AMS prescription

To dispense an Acute Medication Service (AMS) prescription:

1. From the **Pharmacy Manager Side Navigation Bar** select **eMessages**



2. Select the prescription and select **Dispense** 




**eMessages** Logged In

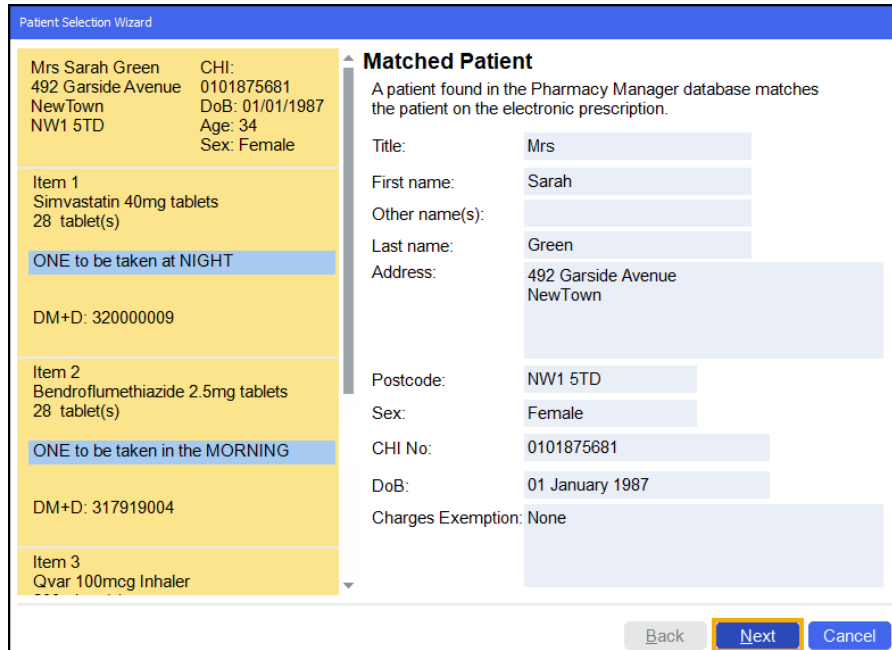
Filter list by: All Action by: Next 7 Days

Only show messages awaiting current action Clear filters

Name	Delivery	MCR Sta.	MAS Status	Action by
1 AMS Prescription for Sarah Green				19/04/2021
2 AMS Prescription for Stephanie Humphries				29/03/2021
3 MCR Prescription request for UPN K10005000001JXX8				05/05/2021

Prescription Details Delete Dispense Re-request Complete

3. The **Matched Patient** screen displays, confirming the patient matches a patient already in **Pharmacy Manager**. Select **Next** 




**Patient Selection Wizard**

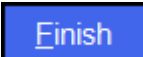
Mrs Sarah Green 492 Garside Avenue NewTown NW1 5TD	CHI: 0101875681 DoB: 01/01/1987 Age: 34 Sex: Female
---	--

**Matched Patient**  
A patient found in the Pharmacy Manager database matches the patient on the electronic prescription.

Title: Mrs  
First name: Sarah  
Other name(s):  
Last name: Green  
Address: 492 Garside Avenue  
NewTown  
Postcode: NW1 5TD  
Sex: Female  
CHI No: 0101875681  
DoB: 01 January 1987  
Charges Exemption: None

Back Next Cancel

 **Note** - If no patient is found, you can create a new patient record by selecting **New Patient**, see [Adding a New Patient](#) on page 14 for details.

4. The **Patient Medication History** screen displays, showing all medication previously dispensed to the patient, from here you can repeat from history if required. Select **Finish** :

Patient Selection Wizard - Mrs Sarah Green (492 Garside Avenue, Newtown, NW1 5TD)

Mrs Sarah Green 492 Garside Avenue NewTown NW1 5TD	CHI: 0101875681 DoB: 01/01/1987 Age: 34 Sex: Female
---	--

**Patient Medication History**

Select any patient medication history that you wish to repeat from

Description	#	Last Dispensed	Qty
Paracetamol 500mg Caplets To be taken as directed. Max 2 per dose, 8 in 24 hrs. Do not take	1	28/04/2021 13:2...	16
Amoxicillin 250mg Capsules ONE to be taken at NIGHT Take regularly and complete the course.	1	19/04/2021 12:0...	21




Don't show me expanded directions  
 Don't show this page again

**Back** **Finish** **Cancel**

5. The **Dispensary** screen displays:

**Dispensary** Form Ordering Print

Patient: Mrs Sarah Green (492 Garside Avenue) 1 Prescriber: Dr. David Burton 1 No. Items: 3 GP10

**Item 1** 1

Written as: Simvastatin 40mg Tablets 1 Quantity: 28 Cost: £0.00

Dispense as: Simvastatin 40mg Tablets (28) [Wockhard UK Ltd] 1 PIP code: 1153154

Directions: ONE to be taken at NIGHT  
Avoid consumption of grapefruit during treatment with this medicine. Caution

Warnings: Edit Trusted Directions

⚠ DM+D description mismatch between electronic message and local data  
⚠ Patient is not exempt  
⚠ Press Ctrl+B to show brands, including branded generics, and Ctrl+G to show generics.  
⚠ Endorsement (Q28)

Item cost: £0.00  
 PIP code: 1153154  
 Pack size: 28  
 Used Today / Max: 0 / 0  
 Min. order / Stock: 0 / 0  
 Auto order: Yes  
 Due in / Owe: 0 / 0  
 Stock level: 0  
 Trade / Retail: £0.00 / £0.00  
 Tariff: £0.88  
 Ingredient Cost: £0.88  
 Total Cost: £0.00 (£0.88) 1

**Item 1**  
 Simvastatin 40mg tablets  
 28 tablet(s)  
 ONE to be taken at NIGHT  
 DM+D: 320000009

**Item 2**  
 Bendroflumethiazide 2.5mg tablets  
 28 tablet(s)  
 ONE to be taken in the MORNING  
 DM+D: 317919004

**Item 3**  
 Qvar 100mcg Inhaler  
 200 dose(s)  
 ONE puff TWICE a DAY  
 DM+D: 3175611000001106


Dr David Burton  
 Paisley Surgery  
 Cirrus  
 Marchburn Drive  
 Date: 19/04/2021  
 3333337

Endorse Save to pending Not dispensed 1 of 3 Cancel Confirm Finish Item


 **Training Tip** – To print the prescription from the **Dispensary** screen, select **Print - Print Prescription** or press **Shift + Alt + P** on your keyboard.

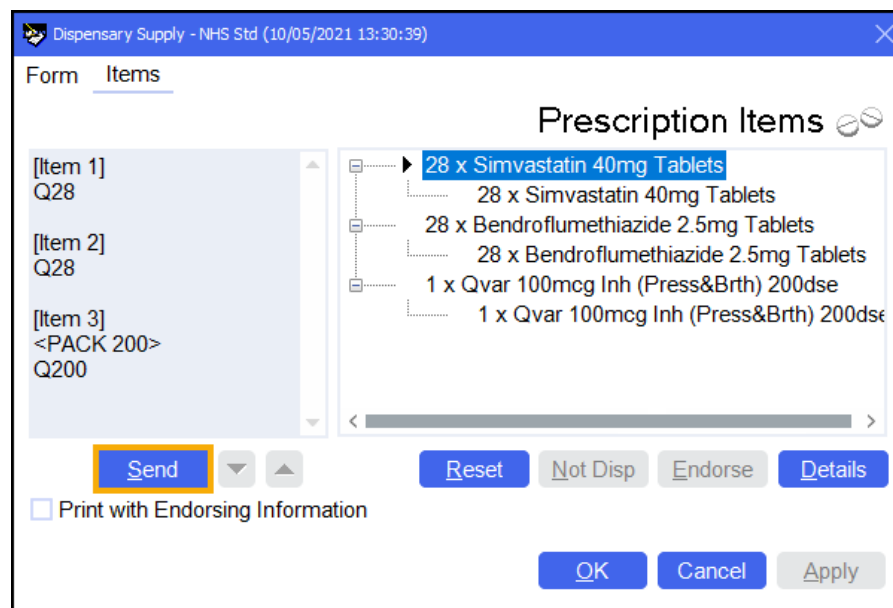
Complete as follows to dispense an item:


- **Written as** - Select **Enter** to search for the prescribed item. **Written as** populates with the item details, for example, Simvastatin 40mg Tablets.
- **Dispense as** - Populates automatically with the dispensed item, for example, Simvastatin 40mg Tablets (28) [Wockhardt UK Ltd].
- **Quantity** - Populates automatically. Check to ensure it is correct.
- **Directions** - Enter the directions provided on the prescription, for example, type 'One to be taken at NIGHT' or enter the appropriate dosage code, '1 space N space'.
- **Warnings** - If **Warnings** display, you must select **Confirm**.
- **Owe** - Enter if appropriate.


6. If the prescription contains multiple items, select **Finish Item**  and repeat the process outlined in step 5.

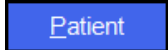
7. After dispensing all items, select **Finish** .

8. The **Dispensary Supply** screen displays, select **Send**  to endorse the prescription:



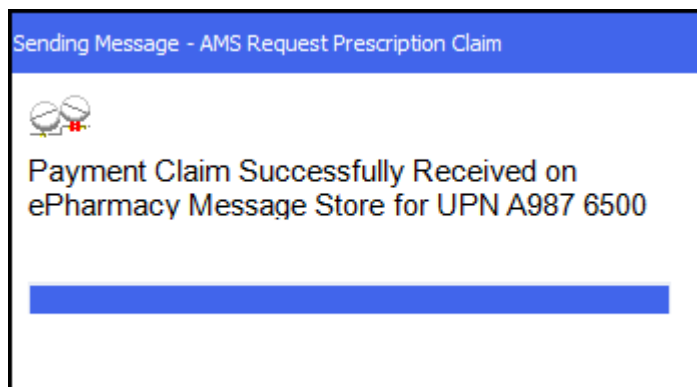
 **Note** - To print the endorsement information on the prescription at this point, tick **Print with Endorsing Information**. The chosen setting is remembered for subsequent prescriptions.

 **Note** - If any information is missing from the printed endorsement please hand annotate as required. For example, where additional items or assorted flavours have been dispensed.

9. The **Confirm Prescription Signatory** screen displays. Select the person who signed for the prescription, for example, select **Patient** :



10. The claim is then automatically sent to National Services Scotland (NSS):




 **Training Tip** – If sending the claim is unsuccessful, it displays in **Unclaimed ePrescription** on the **Pharmacy Manager Dashboard**.



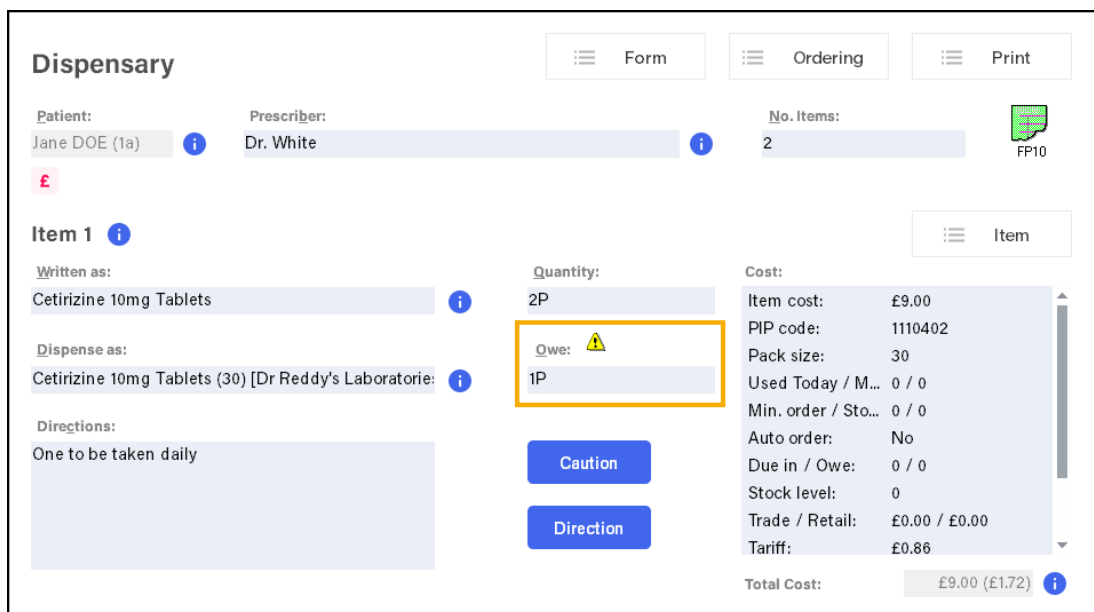
## Creating an Owing

There may be occasions when a prescription can only be partially dispensed, for example, if you have insufficient stock.

 **Note** – You create an **Owing** during the dispensing of an item. The method of creating an owing depends on whether you are using a stock control method.

To create an **Owing**:

1. Dispense the prescription in the usual way, completing the patient, prescriber and item details. See [Dispensing, Endorsing and Claiming an AMS prescription](#) on page 21 if required:




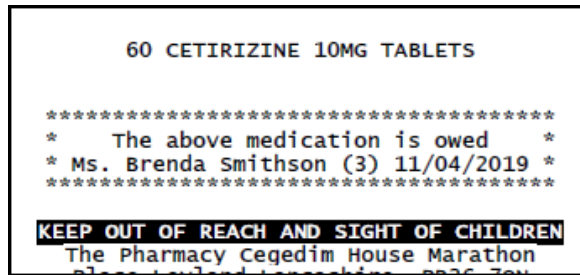
The screenshot shows the 'Dispensary' interface with the following details:

- Patient:** Jane DOE (1a)
- Prescriber:** Dr. White
- No. Items:** 2
- Item 1:** Cetirizine 10mg Tablets
- Dispense as:** Cetirizine 10mg Tablets (30) [Dr Reddy's Laboratorie]
- Directions:** One to be taken daily
- Quantity:** 2P
- Owe:** 1P (highlighted in a yellow box with a warning icon)
- Cost:**
  - Item cost: £9.00
  - PIP code: 1110402
  - Pack size: 30
  - Used Today / M...: 0 / 0
  - Min. order / Sto...: 0 / 0
  - Auto order: No
  - Due in / Owe: 0 / 0
  - Stock level: 0
  - Trade / Retail: £0.00 / £0.00
  - Tariff: £0.86
- Total Cost:** £9.00 (£1.72)

2. If you have set up **Stock Check While Labelling** from **Pharmacy Details - Ordering - Stock Control**, Pharmacy Manager automatically populates the quantity owed in **Owe**. If you do not have **Stock Check While Labelling** set up, you need to enter the **Owe** quantity each time.

 See [Pharmacy Details - Ordering Tab](#) in the **Pharmacy Manager Help Centre** for details.



- Complete the prescription in the usual way, and select **Finish** . **An Owings** label(s) prints:

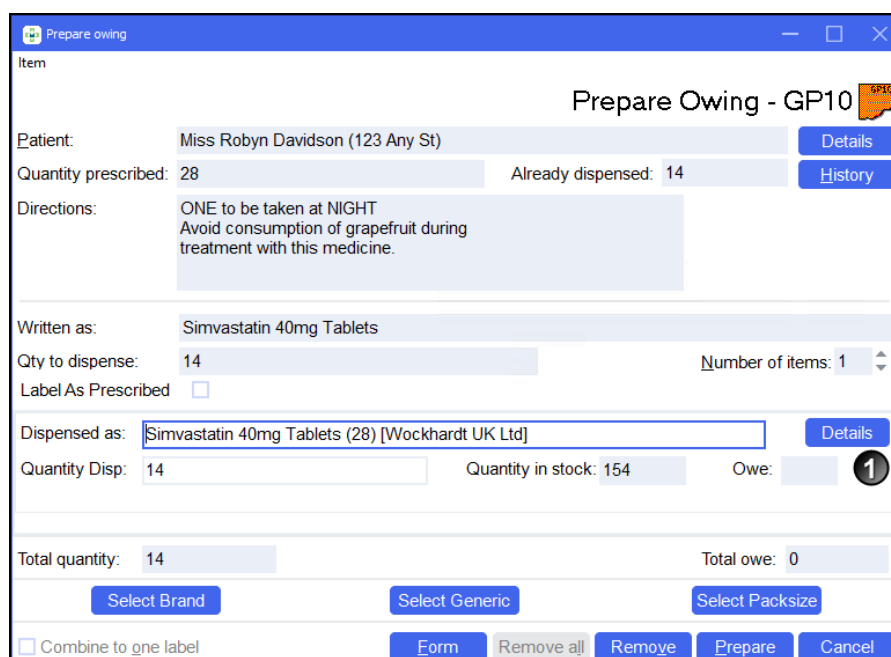


 **Note** - The number of labels that print is set in **Pharmacy Details**.

## Fulfilling an Owing




To fulfil an owing:

- From the **Pharmacy Manager Side Navigation Bar** select **Owings** .
- Optionally, select **Date** and set a date range to display.
- Highlight the appropriate **Owing** and select **Prepare** .
- The **Prepare owing** screen displays, complete as required:
  - Dispensed as** - Update if required.
  - Quantity Disp** - Update to partially dispense the item(s).
  - Owe** - If required, use to create a further owing:




5. Select **Prepare**  to print the item and any further owing label(s).

## When a Patient Collects Their Medication

- When a patient collects their owed medication, from **Owings** , highlight the owing and select **Collect** .
- If a patient does not collect a prepared owing, simply select **Remove**  to return the item to stock.

---

 **Note** - A patient owing displays on the **Owings** screen until marked as collected or removed.

---

## Registering patients for MCR

The Medicines: Care & Review (MCR) also known as Chronic Medication Service (CMS) enables people with a long term illness to register with a pharmacy of their choice for pharmaceutical care.

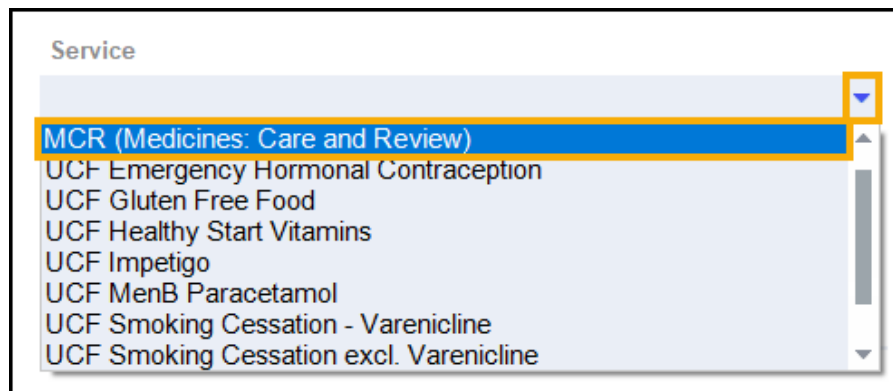
This may include a Medication Review provided by the pharmacist and/or a serial prescription valid for 24, 48 or 56 weeks. A patient must be registered for MCR on **Pharmacy Manager** before recording the service.

To register a patient for MCR:

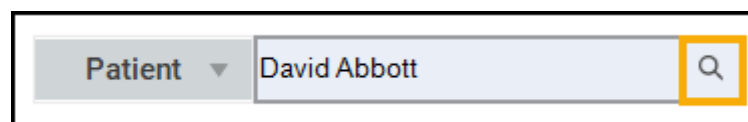
1. From the **Pharmacy Manager Side Navigation Bar** select **ePharmacy**




2. Select **Service - MCR (Medicines: Care and Review)**:

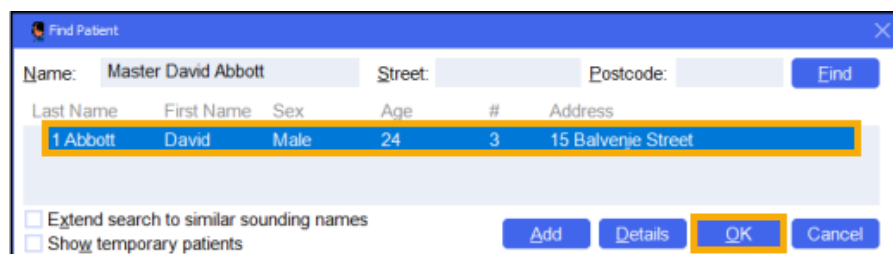



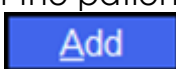
3. In **Patient**, enter the patient's name and select **Search** :



4. The **Find Patient** screen displays. Select the required patient and select


**OK** :



 **Note** - If the patient is not found in **Pharmacy Manager**, select **Add**  to add the patient, see [Adding a New Patient](#) on page 14 for details.

5. The **Confirm patient details** screen displays. Complete as follows:
- **Qualification Rules** - Ensure the patient matches the qualifying criteria for MCR.
  - **Personal Details** - Ensure the patient's personal details are correct:

Confirm patient details

 **Confirm the following details with the patient**

**Qualification Rules**

a) Patient is registered with a GP in Scotland  
b) Patient is NOT a temporary resident in Scotland

**Personal Details**

CHI Number:

Last Name:

FirstName:

Address:

No fixed abode

Postcode:  Sex:

Date of Birth:

**Warning(s)**

Are the above details correct?

6. Select **Yes**

7. Select **Register**

8. A CP3 form prints containing all the patient registration information. The patient or their representative must sign the CP3 form.



**Training Tip** - See [Reprinting the last CP3 or CP4 Form](#) in the **Pharmacy Manager Help Centre** for details.

9. The registration message is then sent to the **ePharmacy Message Store**.

## Dispensing a Serial (MCR) Prescription

There are 4 steps to dispensing a Serial (MCR) Prescription:

1. [Confirming the Dispensing Schedule](#) on page **31**
2. [Dispensing the First Iteration of a Serial \(MCR\) Prescription](#) on page **34**
3. [Collecting a Serial \(MCR\) Prescription](#) on page **36**
4. [Dispensing Subsequent Iterations of a Serial \(MCR\) Prescription](#) on page **40**

For more information on Serial (MCR) Prescriptions see:

- [MCR Dispensing Cycle Completed](#) on page **43**
- [Calculating MCR Due Date](#) on page **45**

Useful MCR Reports in **Pharmacy Manager**:

- **MCR Claim Submissions Report** - Lists patients based on the state of their claim.
- **MCR Parked Prescriptions Report** - Reports on MCR prescriptions that are parked.
- **MCR Patient Status Report** - Lists the patient's MCR registration status.
- **MCR Repeat Not Received** - Lists patients based on MCR repeat not received.
- **MCR Treatment Summary Report** - Electronic Medicines: Care and Review Treatment Summary Report.

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 See [MCR Treatment Summary Report \(TSR\)](#) in the **Pharmacy Manager Help Centre** for details.

- **Missing TSR Submissions Report** - Missing TSR Submissions Report.
- **Upcoming MCR Iterations Report** - Upcoming MCR Iterations Report.

---

 See [A Summary of Standard Reports](#) in the **Pharmacy Manager Help Centre** for details.

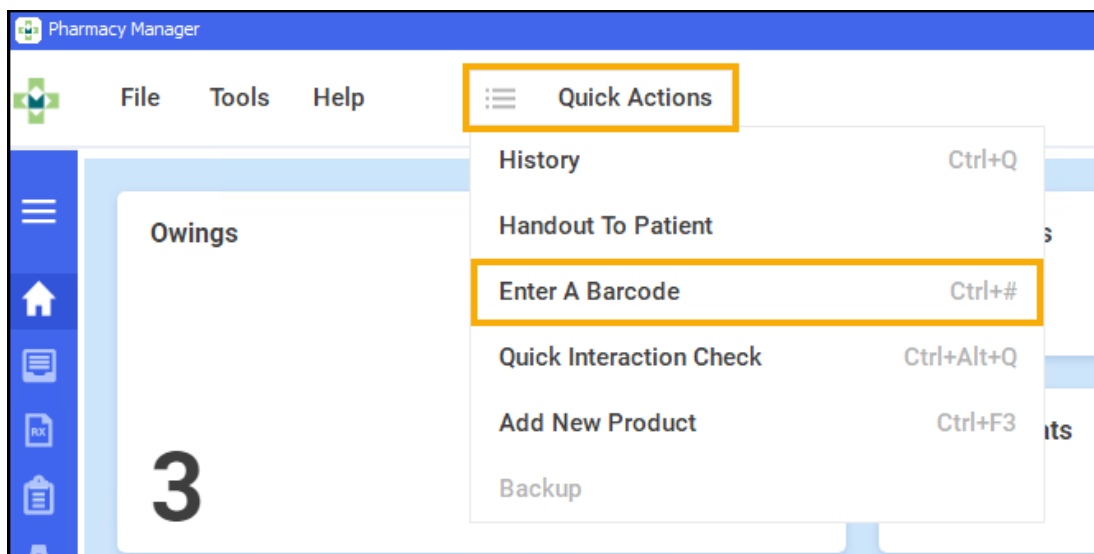
---

## Confirming the Dispensing Schedule

When dispensing the first iteration of a Serial (MCR) Prescription you must confirm the dispensing schedule. The dispensing schedule indicates the quantity of medication and the frequency at which it is due to be dispensed to the patient.

To confirm the dispensing schedule:

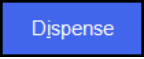
1. Scan the barcode on the Serial (MCR) Prescription, or select **Quick Actions - Enter A Barcode**, and enter the UPN number from the Serial (MCR) Prescription:

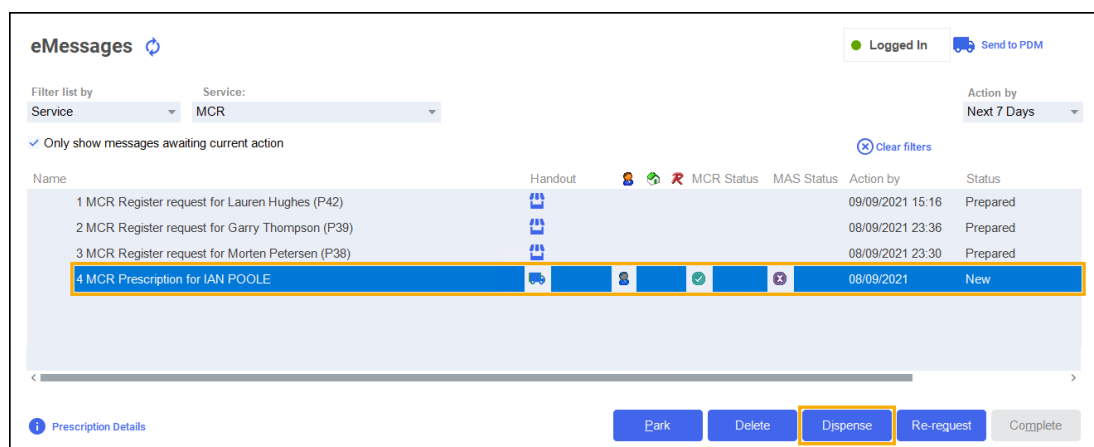


From the **Pharmacy Manager Side Navigation Bar** select **eMessages**

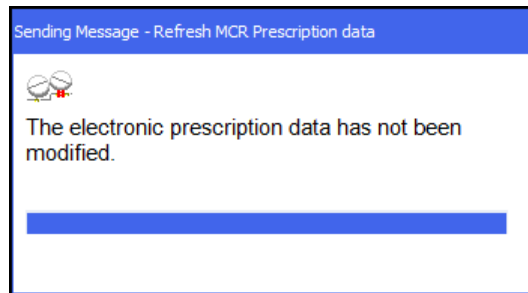


and the **eMessages** screen displays with the scanned/entered prescription highlighted.

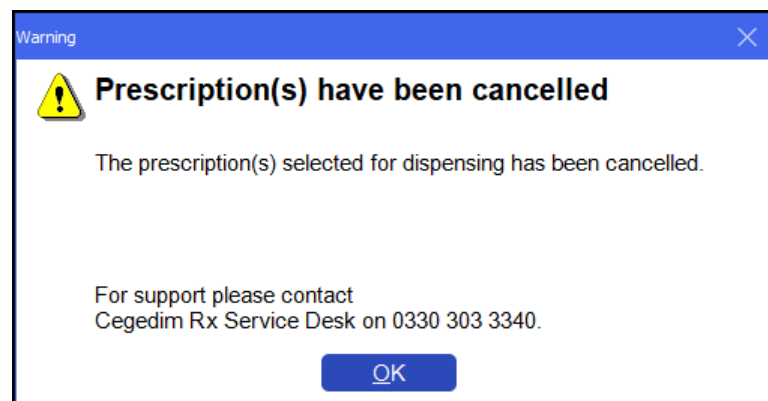
2. The prescription is ready to dispense when the status changes to **New**, select **Dispense** :

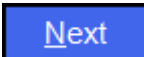


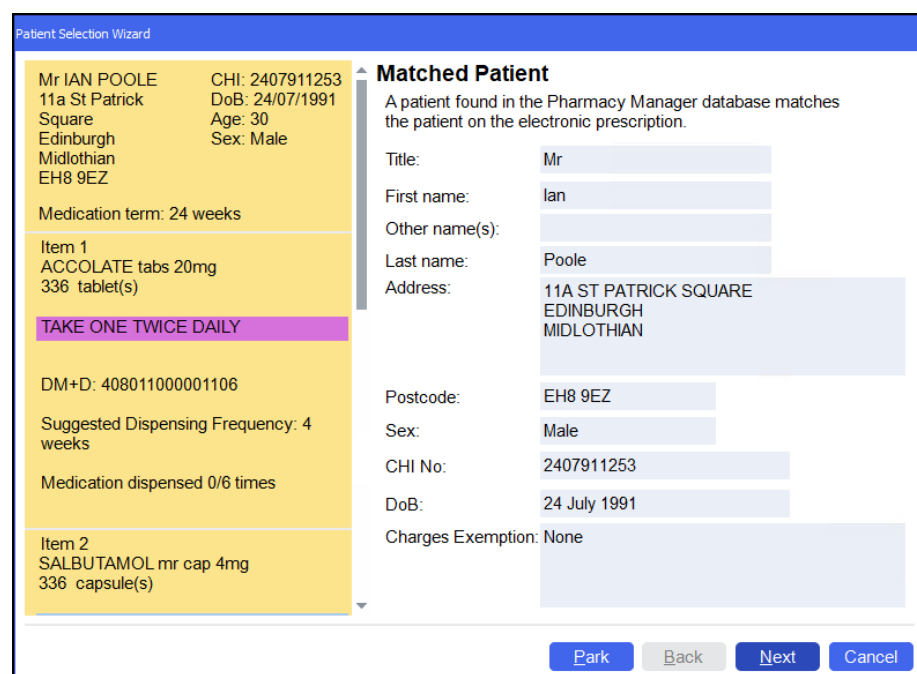
3. **Pharmacy Manager** checks to see if the MCR prescription has been modified by the prescriber:



If the prescription is cancelled a warning displays:



4. The **Matched Patient** screen displays. Confirm the patient's identity and select **Next** :



Patient Selection Wizard		Matched Patient	
Mr IAN POOLE	CHI: 2407911253	A patient found in the Pharmacy Manager database matches the patient on the electronic prescription.	
11a St Patrick Square	DoB: 24/07/1991	Title:	Mr
Edinburgh	Age: 30	First name:	Ian
Midlothian	Sex: Male	Other name(s):	
EH8 9EZ		Last name:	Poole
Medication term: 24 weeks		Address:	11A ST PATRICK SQUARE EDINBURGH MIDLOTHIAN
Item 1		Postcode:	EH8 9EZ
ACCOLATE tabs 20mg		Sex:	Male
336 tablet(s)		CHI No:	2407911253
TAKE ONE TWICE DAILY		DoB:	24 July 1991
DM+D: 408011000001106		Charges Exemption:	None
Suggested Dispensing Frequency: 4 weeks			
Medication dispensed 0/6 times			
Item 2			
SALBUTAMOL mr cap 4mg			
336 capsule(s)			



**Training Tip** - If you are unsure when you are going to dispense the first iteration of the prescription you can choose to **Park** the prescription. The prescription status changes from **New** to **Parked** and no longer displays as a **New Prescription**.



5. The **Dispensing Schedule** screen displays:

Patient Selection Wizard - Mr Ian Poole (11A ST PATRICK SQUARE, EDINBURGH, MIDLOTHIAN, EH8 9EZ)

Mr IAN POOLE 11a St Patrick Square Edinburgh Midlothian EH8 9EZ	CHI: 2407911253 DoB: 24/07/1991 Age: 30 Sex: Male	<h3>Dispensing Schedule</h3> <p>Please select the dispensing schedule for each item of medication on the electronic prescription.</p> <p>The details selected below describe how often medication will be dispensed and how much will be given each time the prescription is dispensed. Once selected these details will be used to establish a dispensing schedule for this prescription.</p>
Medication term: 24 weeks		
Item 1 ACCOLATE tabs 20mg 336 tablet(s)		<p>ACCOLATE tabs 20mg 336 tablet(s)</p> <p>Dispense <input type="text" value=""/> every <input type="text" value="28"/> days Total: Unknown</p>
<b>TAKE ONE TWICE DAILY</b>		<p>SALBUTAMOL mr cap 4mg 336 capsule(s)</p> <p>Dispense <input type="text" value="56"/> every <input type="text" value="28"/> days Total: 336</p>
DM+D: 408011000001106		
Suggested Dispensing Frequency: 4 weeks		
Medication dispensed 0/6 times		
Item 2 SALBUTAMOL mr cap 4mg 336 capsule(s)		Proposed date of first dispensing: <input type="text"/>

**Pharmacy Manager** automatically populates the **Dispensing Schedule** for each item on the prescription based on the Medication term, quantity and dosage/directions on the serial prescription and populates **Dispense** and **Every** with the correct values. In the example of the second item above, 336 capsules of Salbutamol 4mg is prescribed over a 24 week period with the directions 'TAKE ONE TWICE DAILY', **Pharmacy Manager** calculates you should dispense 56 tablets every 28 days.


If a value is required it is highlighted with your chosen colour, in this example the **Dispense** value requires adding.

6. Enter the **Proposed date of first dispensing**.


7. Select **Finish**  and the **Dispensary**  screen displays.

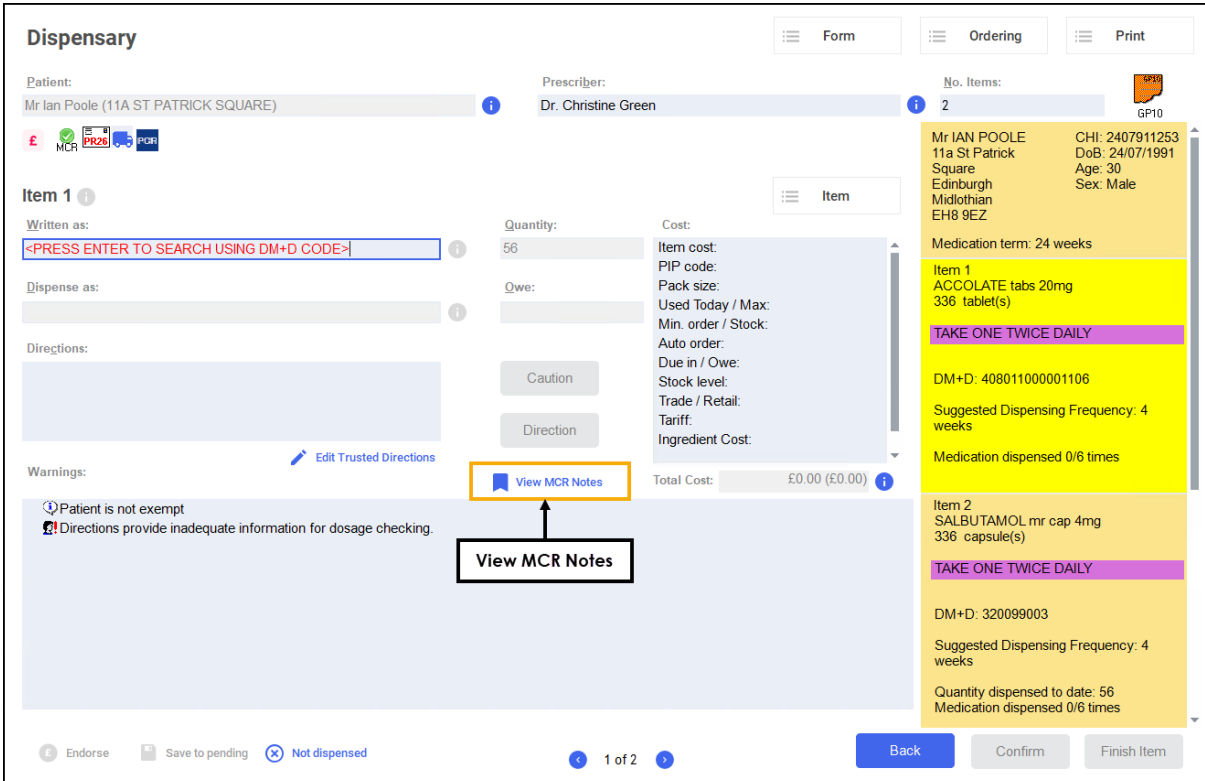
 Continue to dispense the first iteration of the Serial Prescription, see [Dispensing the First Iteration of a Serial \(MCR\) Prescription](#) on page 34.

## Dispensing the First Iteration of a Serial (MCR) Prescription

After confirming the Dispensing Schedule, the **Dispensary**  screen displays and you can dispense the first iteration of the prescription.

 See [Confirming the Dispensing Schedule](#) on page 31 for details.

1. From the **Dispensary**  screen, continue to dispense an item as normal:



The screenshot shows the 'Dispensary' screen with the following details:

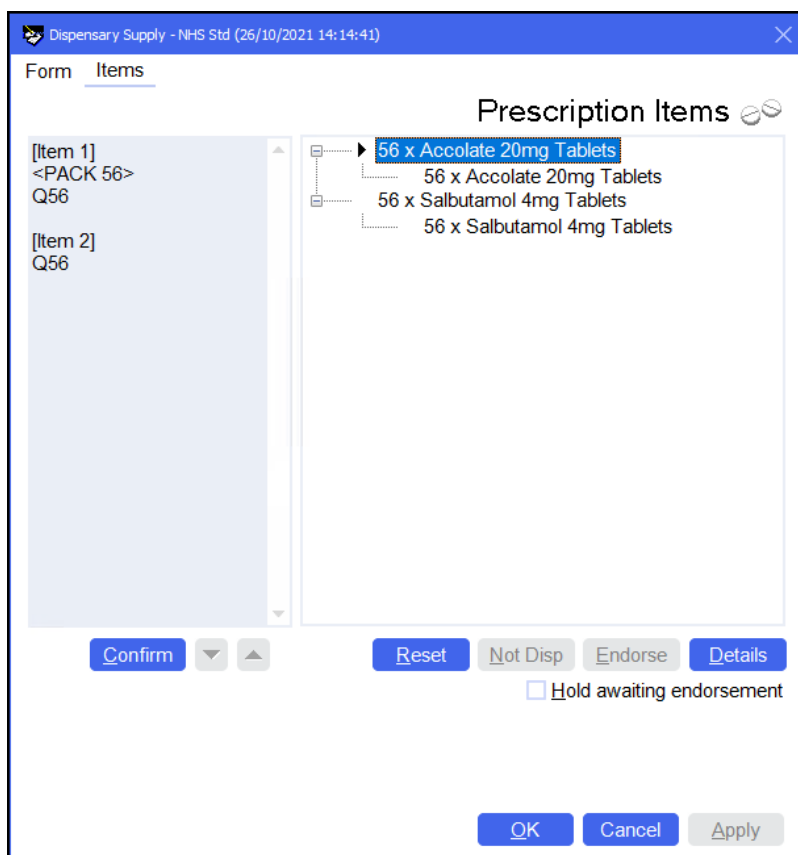
- Patient:** Mr Ian Poole (11A ST PATRICK SQUARE)
- Prescriber:** Dr. Christine Green
- No. Items:** 2
- Item 1:** ACCOLATE tabs 20mg 336 tablet(s). Instructions: TAKE ONE TWICE DAILY. DM+D: 408011000001106. Suggested Dispensing Frequency: 4 weeks.
- Item 2:** SALBUTAMOL mr cap 4mg 336 capsule(s). Instructions: TAKE ONE TWICE DAILY. DM+D: 320099003. Suggested Dispensing Frequency: 4 weeks.
- Warnings:** Patient is not exempt. Directions provide inadequate information for dosage checking.
- Buttons:** 'View MCR Notes' is highlighted with a callout box. Other buttons include 'Endorse', 'Save to pending', 'Not dispensed', 'Back', 'Confirm', and 'Finish Item'.


 **Training Tip** - Any notes added into **View MCR Notes** display on the **MCR Treatment Summary Report**, see [MCR Treatment Summary Report \(TSR\)](#) in the **Pharmacy Manager Help Centre** for details.

 **Training Tip** - To print the prescription from the **Dispensary** screen, select **Print - Print Prescription** or press **Shift + Alt + P** on your keyboard.

2. After dispensing all items, select **Finish** .

3. The **Dispensary Supply** screen displays. Select **Confirm**  to endorse the prescription:



 **Note** - If you do not endorse the prescription at this point you can endorse it before or after it is collected from the **Pending** screen.

The first iteration of the Serial (MCR) Prescription is now ready for collection.

 See [Collecting a Serial \(MCR\) Prescription](#) on page **36** for details.

The next iteration displays in the **Repeats** screen when the prescription is due.

 See [Dispensing Subsequent Iterations of a Serial \(MCR\) Prescription](#) on page **40** for details.

## Collecting a Serial (MCR) Prescription

Prior to the patient collecting their prescription, the Serial (MCR) Prescription must be set as collected in **Pharmacy Manager**.

**i Important** - There is now a requirement that the system checks if the prescription has been cancelled by the prescriber since the time it was dispensed, so this must be completed prior to handing out to a patient.

1. To collect a Serial (MCR) Prescription select the **Pending** screen, either:


- From the **Pharmacy Manager Dashboard**, select **Uncollected MCR prescriptions**:

Owings → <b>1</b> ⌚ 16:02	Instalments → <b>0</b> ⌚ 12:02	Unclaimed ePrescriptions → <b>0</b> ⌚ 12:02	Pending Orders → <b>0</b> ⌚ 12:02
	MCR Repeats → <b>0</b> ⌚ 12:02	<b>Uncollected MCR Prescriptions</b> → <b>0</b> ⌚ 12:02	New Prescriptions → <b>76</b> ⌚ 12:02

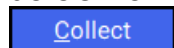
- From the **Pharmacy Manager Side Navigation Bar** select **Pending**




2. The prescription displays with a status of either:

- Not collected** - The prescription is not endorsed or collected. To endorse the prescription, select **Endorse** .
- Not collected\*** - The prescription is endorsed but not collected.

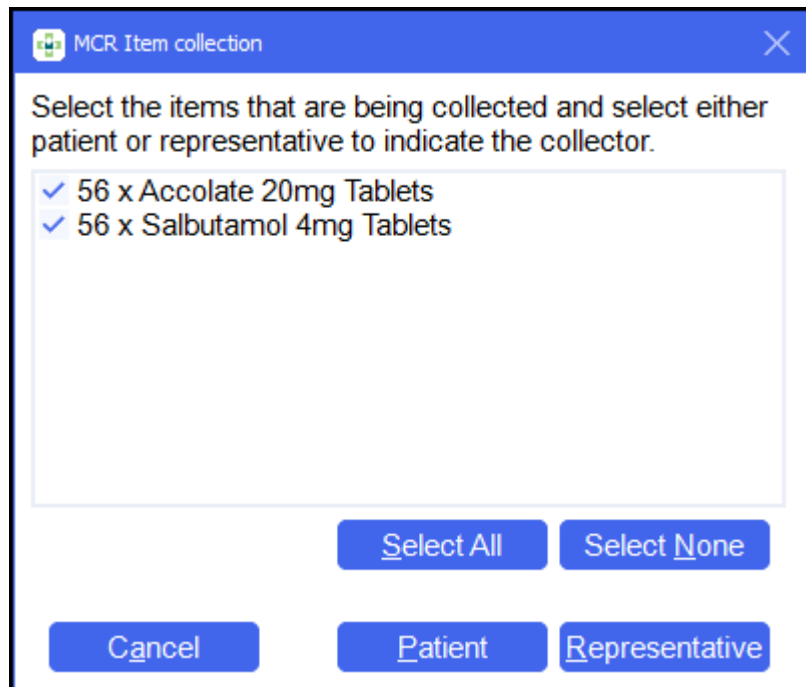
3. Select to highlight the prescription(s) and then select **Collect**



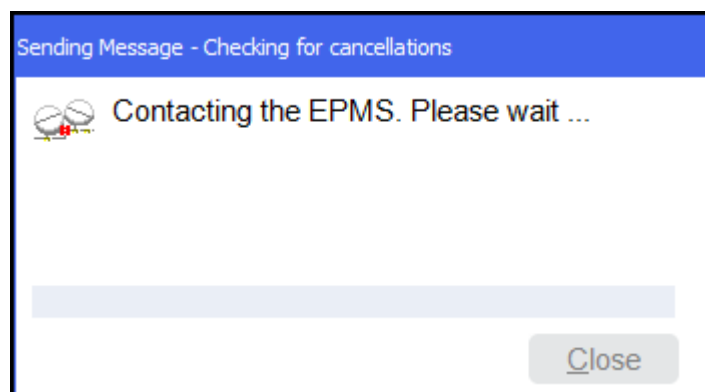
 **Note** - You can collect multiple prescriptions for one patient at the same time.

 **Note** - If you are not connected to **ePharmacy**, **Collect** is inactive.

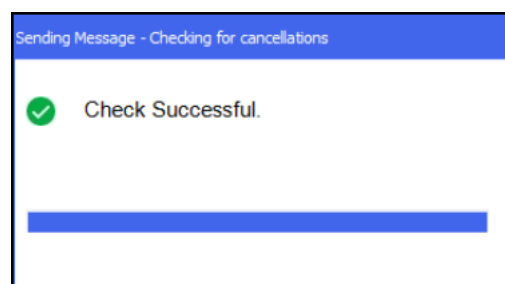
4. The **MCR Item Collection** screen displays. Select the items being collected and then select the person collecting the prescription, for example, **Patient** :



5. **Pharmacy Manager** checks with ePMS to see if any of the selected prescription items have been cancelled by the prescriber since dispensing:



- If the check is successful and no items have been cancelled by the prescriber the response returns as successful and the selected items are marked as collected:



- If any of the prescription items have been cancelled by the prescriber or there is an error with the check, the following screen displays:



**MCR Cancellation Status**

**Patient Name:** Miss Priti Singh

 One or more of the items you have selected for collection has been cancelled, or the cancellation check has failed. If a cancellation check has failed, please make additional enquiries with the prescriber or patient before handing out. Items successfully checked and not cancelled are pre-selected. Please confirm the items you would like to continue to collect.

Item Name	Status	Description	UPN	Iteration No.
<input type="checkbox"/> 28 x Fluoxetine 20mg Capsules	Cancelled	Date/Time: 16/01/2009 10:43:22 Reason: 2 Items ca...	K1000500001JKSHT	1 of 6
Date/Time: 16/01/2009 10:43:22 Reason: 2 Items cancelled - different UPNs PT011 4-3 16/01/2009				
<input type="checkbox"/> 28 x Fluoxetine 20mg Capsules	Check Failed	Error acknowledgement received: Code: 3260 Description: ePharmacy: 3260 - WARNING: CMS electronic prescription ref K100 0500 001J KSKX is not available. If this condition persists please contact the ePharmacy help desk. Details: CMS Prescription not found	K1000500001JKSKX	1 of 6
<input type="checkbox"/> 5 x One Touch UltraSoft 0.4mm/28g Lancet	Check Failed	Error acknowledgement received: Code: 3260 Description: ePharmacy: 3260 - WARNING: CMS electronic prescription ref K100 0500 001J KSKX is not available. If this condition persists please contact the ePharmacy help desk. Details: CMS Prescription not found	K1000500001JKSKX	1 of 6
<input checked="" type="checkbox"/> 6 x One Touch UltraSoft 0.4mm/28g Lancet	OK	Ready for Collection	K1000500001JKSHT	1 of 6

NOTE: If you do not wish to collect any cancelled items please edit the dispensary supply marking any items as not dispensed, or endorse as not collected.

Show me Expanded Description

[Cancel Collection](#) [Confirm Selected Items](#)

Prescription items are listed with a status:

- **OK** - Items are checked and are not cancelled by the prescriber. These are automatically ticked ready for you to confirm collection.
- **Cancelled** - The item has been cancelled by the prescriber.
- **Check Failed** - The check for cancellations has failed.



**Training Tip** - To hide the expanded descriptions remove the tick from **Show me Expanded Description**.

From here you can do the following:

- Select **Cancel Collection** to cancel the whole collection process.



**Note** - If you are no longer handing out this prescription item you must either edit the dispensary supply marking the item as **Not Dispensed** or endorse the item as **Not Collected**.

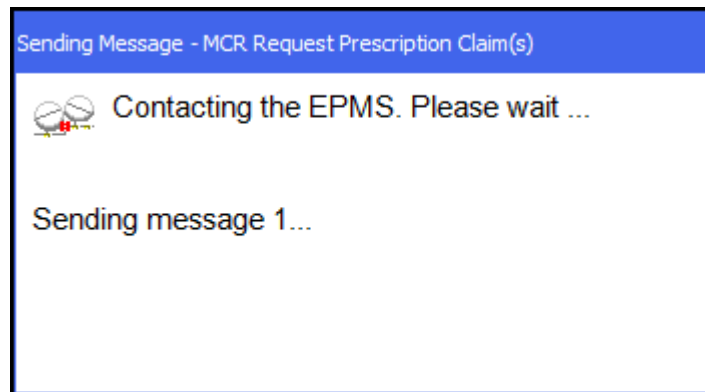
- Select **Confirm Selected Items** to continue with the collection of the ticked prescription items.




**Important** - To continue to handout prescriptions items with a status of **Cancelled** or **Check Failed** is at your own discretion, you must select the item first. An audit trail of this displays in **Patient History**.

6. When the prescription is marked as collected:


- If the prescription is endorsed the claim is automatically sent:



- If the prescription is still not endorsed it remains on the **Pending** screen with a status of **Not endorsed**.

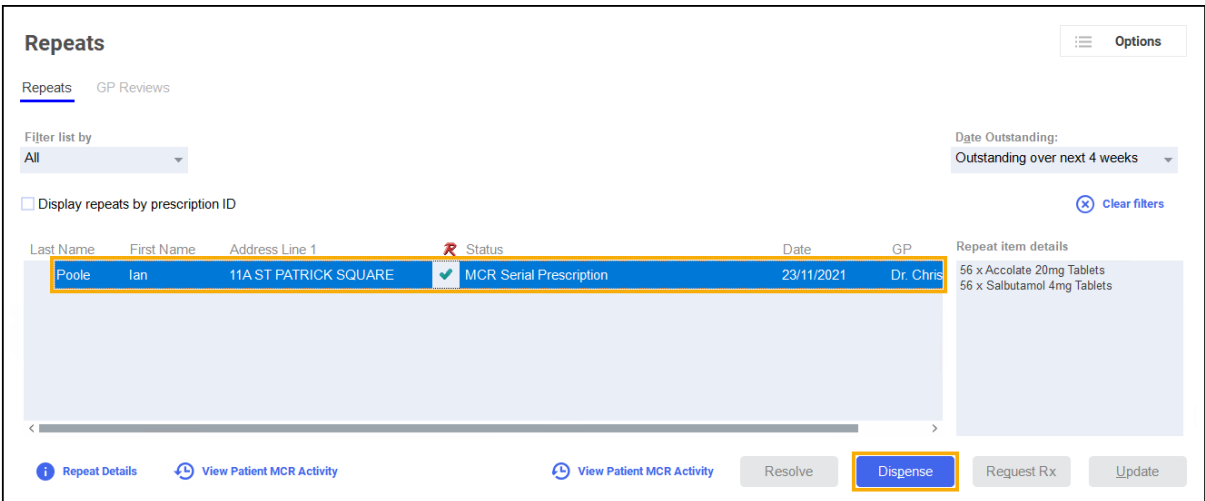
To endorse the prescription, select **Endorse** .

## Dispensing Subsequent Iterations of a Serial (MCR) Prescription

After a patient has received the first iteration of their MCR prescription, each additional iteration displays within the **Repeats**  screen when it is due to be dispensed.

To dispense subsequent iterations of a serial prescription:

1. From the **Pharmacy Manager Side Navigation Bar** select **Repeats** .
2. Highlight the prescription and select **Dispense** .



**Repeats** Options

Repeats GP Reviews

Filter list by: **All**

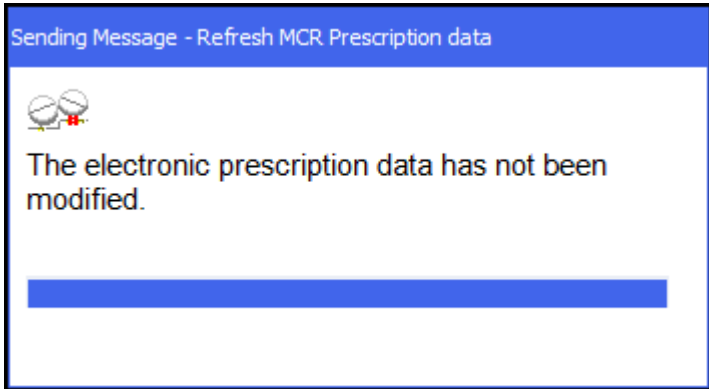
Date Outstanding: Outstanding over next 4 weeks

Display repeats by prescription ID Clear filters


Last Name	First Name	Address Line 1	Status	Date	GP	Repeat item details
Poole	Ian	11A ST PATRICK SQUARE	MCR Serial Prescription	23/11/2021	Dr. Chns	56 x Accolate 20mg Tablets 56 x Salbutamol 4mg Tablets

Repeat Details View Patient MCR Activity View Patient MCR Activity Resolve Dispense Request Rx Update

3. **Pharmacy Manager** checks to see if the MCR prescription has been modified by the prescriber:




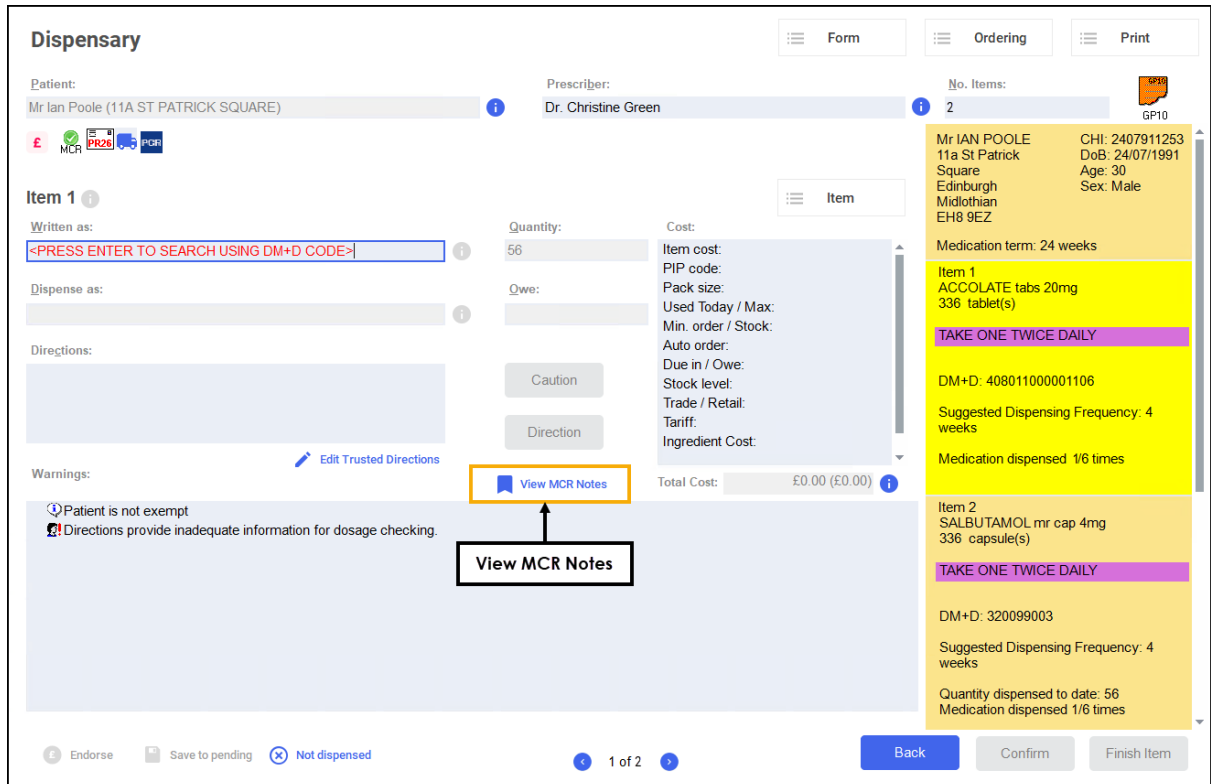
Sending Message - Refresh MCR Prescription data



The electronic prescription data has not been modified.



4. From the **Dispensary**  screen, continue to dispense an item as normal:



**Dispensary** [Form] [Ordering] [Print]

Patient: Mr Ian Poole (11A ST PATRICK SQUARE) Prescriber: Dr. Christine Green No. Items: 2

Item 1

Written as: <PRESS ENTER TO SEARCH USING DM+D CODE>

Quantity: 56

Dispense as:

Directions:

Warnings: Patient is not exempt  
Directions provide inadequate information for dosage checking.

View MCR Notes

View MCR Notes

Item 1: ACCOLATE tabs 20mg 336 tablet(s) TAKE ONE TWICE DAILY

Item 2: SALBUTAMOL mr cap 4mg 336 capsule(s) TAKE ONE TWICE DAILY

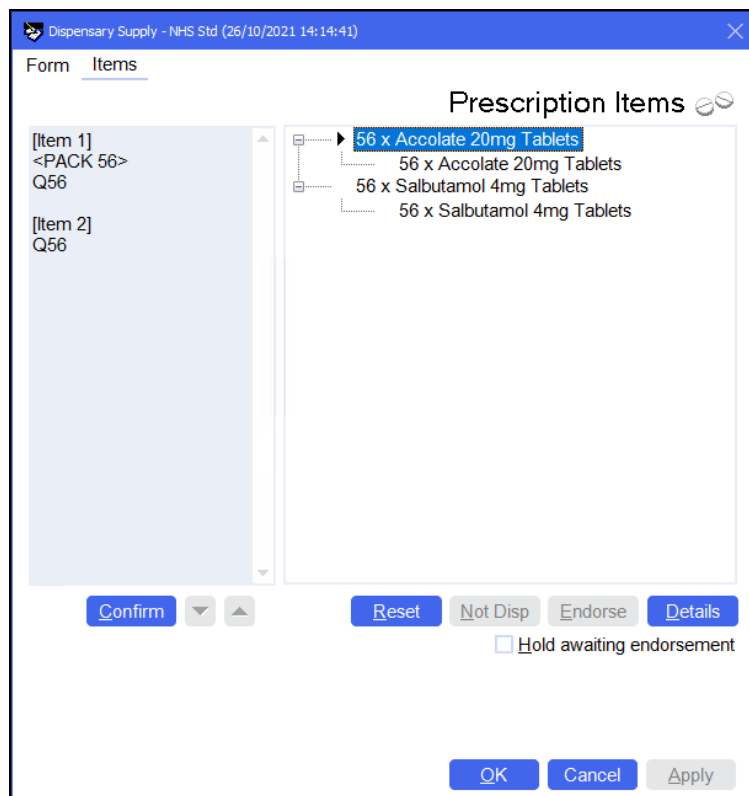
Endorse Save to pending Not dispensed 1 of 2 Back Confirm Finish Item


 **Training Tip** - Any notes added into **View MCR Notes** display on the **MCR Treatment Summary Report**, see [MCR Treatment Summary Report \(TSR\)](#) in the **Pharmacy Manager Help Centre** for details.

 **Training Tip** - To print the prescription from the **Dispensary** screen, select **Print - Print Prescription** or press **Shift + Alt + P** on your keyboard.

5. After dispensing all items, select **Finish** .

6. The **Dispensary Supply** screen displays. Select **Confirm**  to endorse the prescription:



 On the final dispensing of the cycle a warning displays to enter repeat details, see [MCR Dispensing Cycle Completed](#) on page [43](#) for details.

The Serial (MCR) Prescription is now ready to be collected.

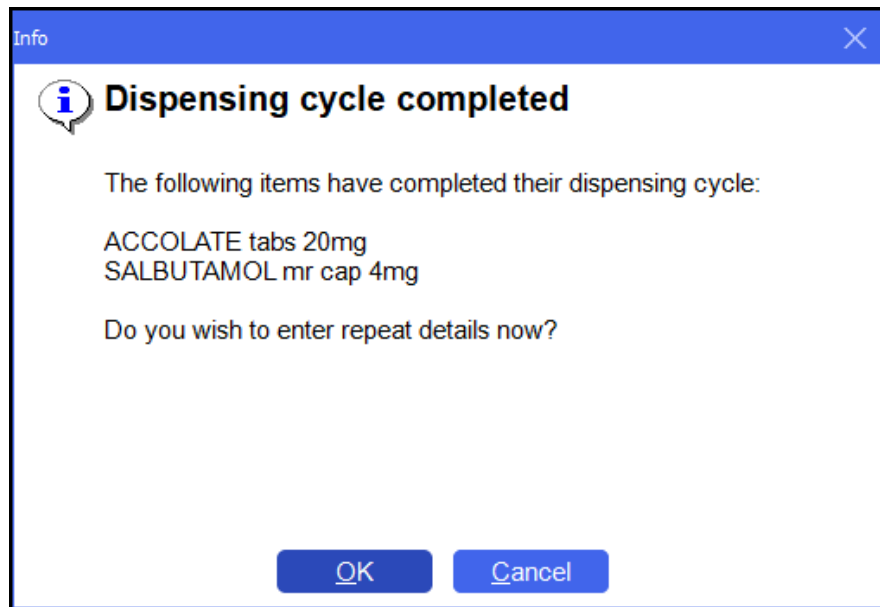
 See [Collecting a Serial \(MCR\) Prescription](#) on page [36](#) for details.

## MCR Dispensing Cycle Completed

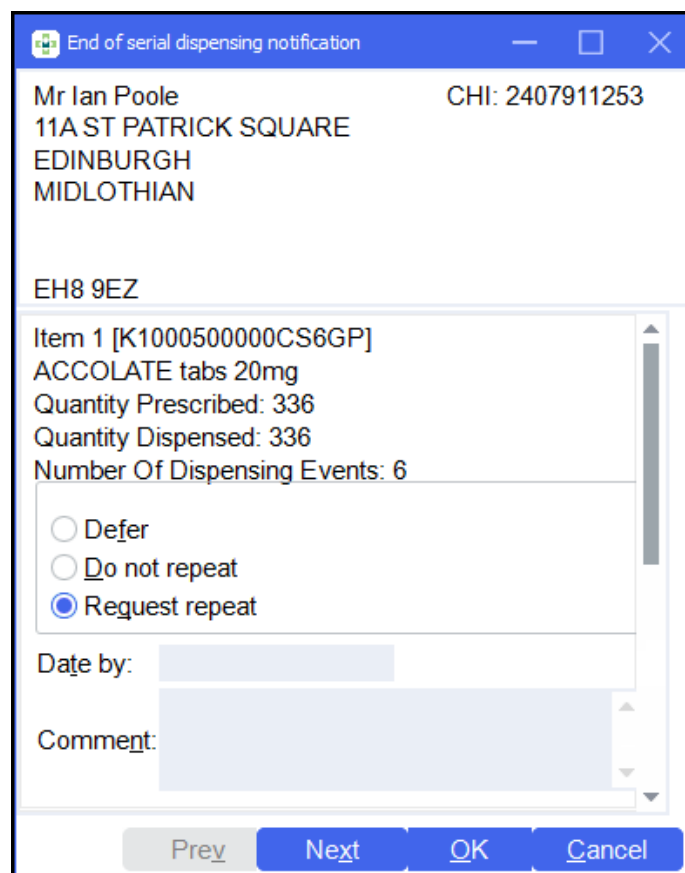
After dispensing all iterations on a serial (MCR) prescription, you can prepare the renewal request of the prescription, ready to send the MCR Treatment Summary Report (TSR) to the prescriber:



1. After dispensing and endorsing the final iteration of the prescription,

the **Dispensing cycle completed** screen displays. Select **OK** 




2. The **End of serial dispensing notification** screen displays:



3. For the first item select either:
  - **Defer** - If you are undecided whether there needs to be a repeat requested, select **Defer**.
  - **Do not repeat** - If you do not wish to request a repeat for an item, select **Do not repeat**.
  - **Request repeat** - To request a repeat prescription.
4. Enter any comments for the prescriber.
5. Select **Next**  to move onto the second item if required. Repeat steps 3 and 4.
6. Select **OK**  once all items have been completed.

---

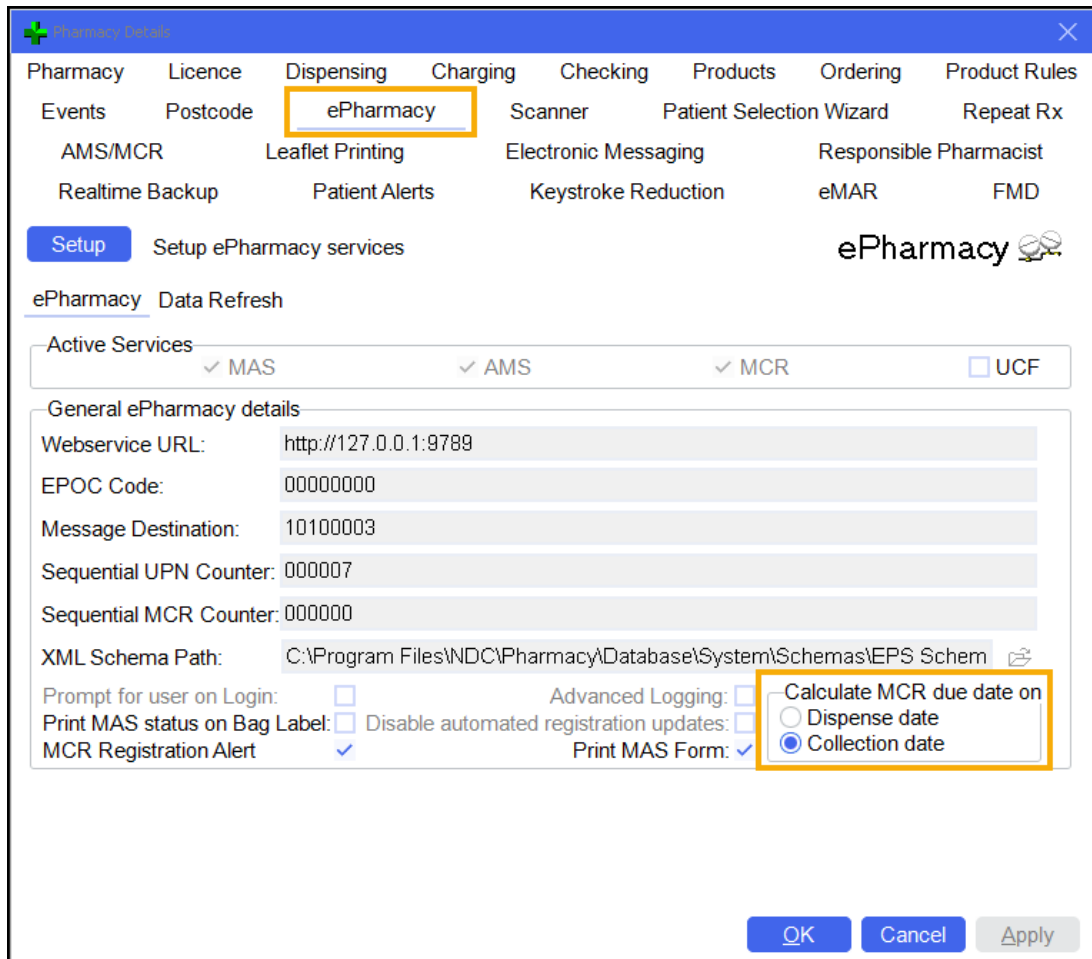
 **Important** - This **does not** send the repeat request to the prescriber, you will need to run the [MCR Treatment Summary Report \(TSR\)](#) in the **Pharmacy Manager Help Centre**.

---

## Calculating MCR Due Date

To set how **Pharmacy Manager** calculates what date the next Medicines: Care & Review (MCR) is due:


1. From the **Pharmacy Manager Menus** select **Tools - System Settings - Pharmacy Details - ePharmacy**:



The screenshot shows the 'Pharmacy Details' window with the 'ePharmacy' sub-menu selected. Under 'Active Services', 'MAS', 'AMS', and 'MCR' are checked. In the 'General ePharmacy details' section, the 'Calculate MCR due date on' dropdown is set to 'Collection date'.

2. From the section **Calculate MCR due date on**, select the required setting:
  - **Dispense date** (default) - The MCR is calculated based on the previous dispensed date.
  - **Collection date** - The MCR is calculated based on the previous collected date. For prescriptions that have been dispensed but not collected, the MCR due date is calculated on the dispense date and then updates once the prescription is collected.

---

 **Note** - If you change the setting it does not recalculate any previously calculated iterations.


---

## Instalment Dispensing

**Pharmacy Manager** allows you to manage prescriptions dispensed in instalments, calculating the splits between instalments and printing the labels with the correct dates in a single run. When calculating the split quantities, **Pharmacy Manager** can consider non-working days such as Sundays and public holidays.

When dealing with certain drug classes, for example, controlled drugs, you may need to dispense a prescription using instalments.

---

 **Important** - You can dispense Instalments from paper and AMS electronic prescriptions.

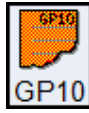
---

To dispense a prescription in instalments:


1. Dispense the prescription in the usual way, but do not select **Finish**



2. For paper prescriptions make sure **Form Type** displays the correct form

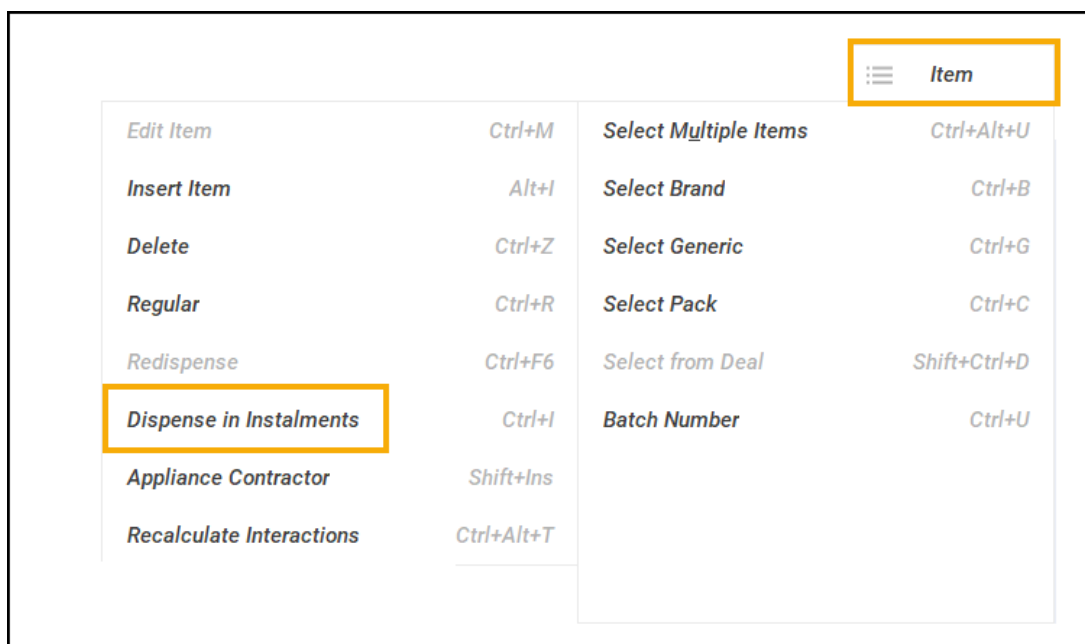
type. Double click on the current form type, for example, **GP10**  to change it.

---

 **Note** - Instalment dispensing is not limited to addict prescriptions therefore you can dispense under the form type of **GP10**, **GP10 (P)**, **GP10 (N)**, **GP10 (NMP)** and **HBP**.

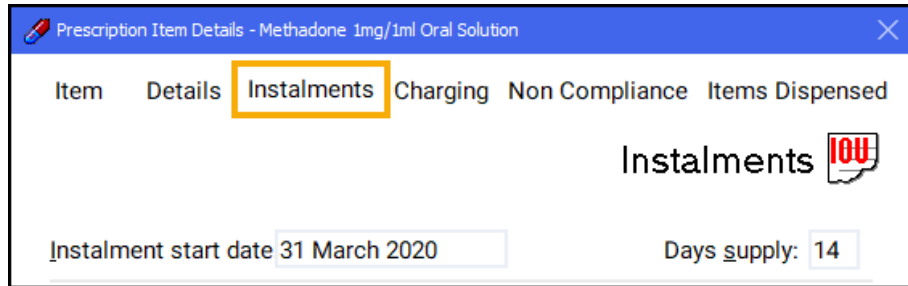
---

3. From **Item**, select **Dispense in Instalments** or press **Ctrl + I** on your keyboard:




		Item	
Edit Item	Ctrl+M	Select Multiple Items	Ctrl+Alt+U
Insert Item	Alt+I	Select Brand	Ctrl+B
Delete	Ctrl+Z	Select Generic	Ctrl+G
Regular	Ctrl+R	Select Pack	Ctrl+C
Redispense	Ctrl+F6	Select from Deal	Shift+Ctrl+D
<b>Dispense in Instalments</b>	Ctrl+I	Batch Number	Ctrl+U
Appliance Contractor	Shift+Ins		
Recalculate Interactions	Ctrl+Alt+T		

4. The **Prescription Item Details - Instalments** tab displays. Complete as outlined below:



Prescription Item Details - Methadone 1mg/1ml Oral Solution

Item Details **Instalments** Charging Non Compliance Items Dispensed

Instalments 

Instalment start date: 31 March 2020 Days supply: 14

- **Instalment start date** - Defaults to today's date, if you do not want the instalments to start today, update as required.



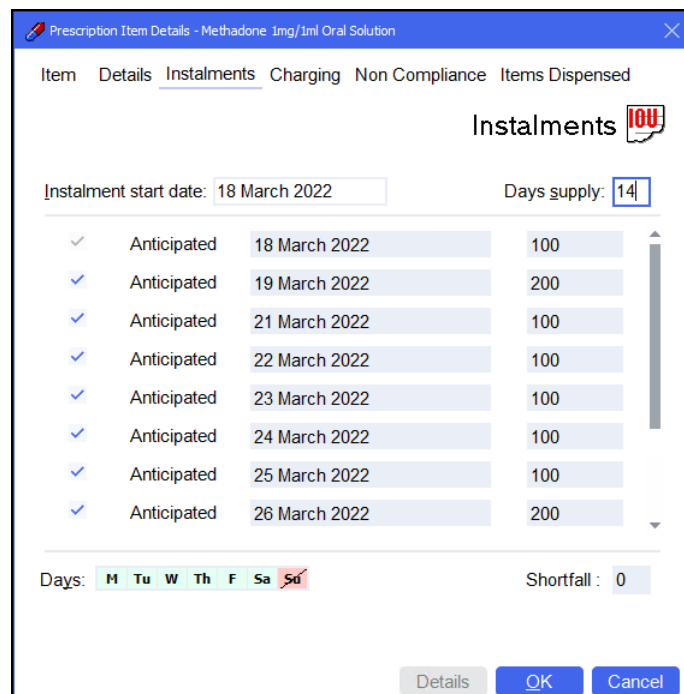
**Training Tip** - The **Instalment start date** cannot be before today's date.

- **Days supply** - Enter the number of days supply you want to issue and press **Enter** on your keyboard.




**Note** - The maximum supply is **84** days.

5. **Pharmacy Manager** automatically calculates the date each instalment should be given and the appropriate quantity based on the pharmacy opening days:



Prescription Item Details - Methadone 1mg/1ml Oral Solution

Item Details Instalments Charging Non Compliance Items Dispensed

Instalments 

Instalment start date: 18 March 2022 Days supply: 14

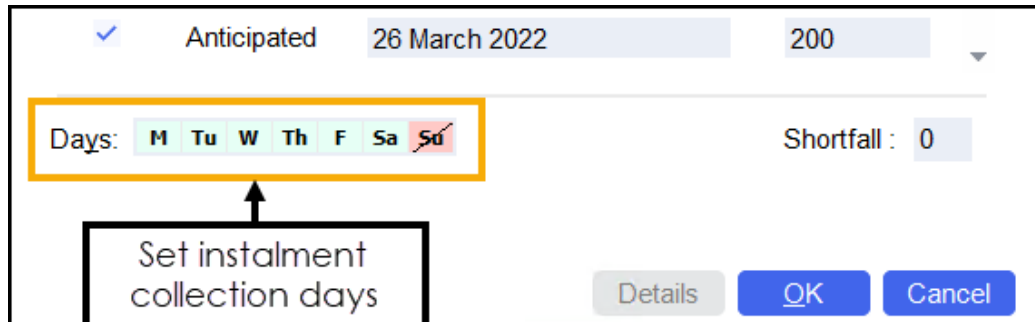
✓	Anticipated	18 March 2022	100
✓	Anticipated	19 March 2022	200
✓	Anticipated	21 March 2022	100
✓	Anticipated	22 March 2022	100
✓	Anticipated	23 March 2022	100
✓	Anticipated	24 March 2022	100
✓	Anticipated	25 March 2022	100
✓	Anticipated	26 March 2022	200

Days: M Tu W Th F Sa ~~Su~~ Shortfall: 0

Details OK Cancel

**Note** - Calculations are based on the pharmacy's opening hours set in **Tools - System Settings - Pharmacy Details - Pharmacy - Opening Times**. In the above example the pharmacy does not open on a Sunday so **Pharmacy Manager** schedules two instalments on a Saturday.

- a. Check the instalment schedule, if your pharmacy closes on additional days or the patient cannot attend on a certain day each week, go to the **Days** option and select the relevant day. The day selected displays in red with a line through it and the instalment schedule updates accordingly:




Anticipated 26 March 2022 200

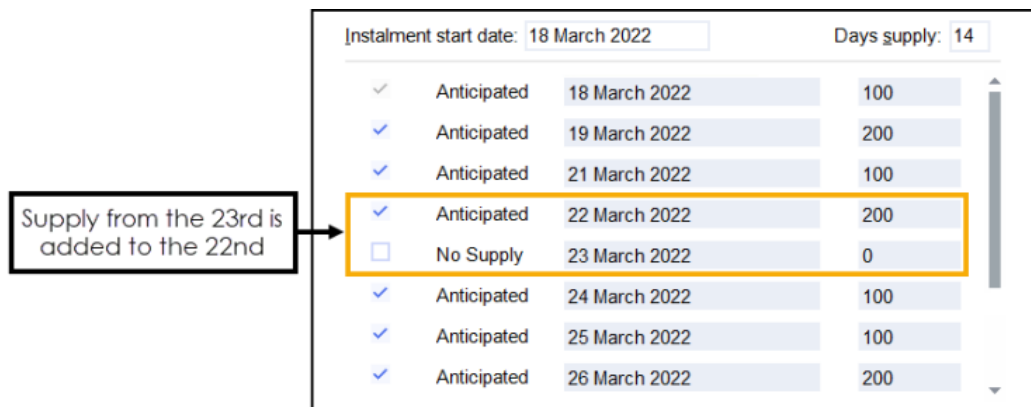
Days: M Tu W Th F Sa ~~Su~~ Shortfall: 0

Set instalment collection days

Details OK Cancel

 **Note** - Any changes made here only apply to this item, they do not affect the default settings.

- b. Should you need to manually remove an individual day from the schedule, for example the pharmacy closes on a bank holiday, remove the tick from the instalment line and the instalment schedule updates accordingly:

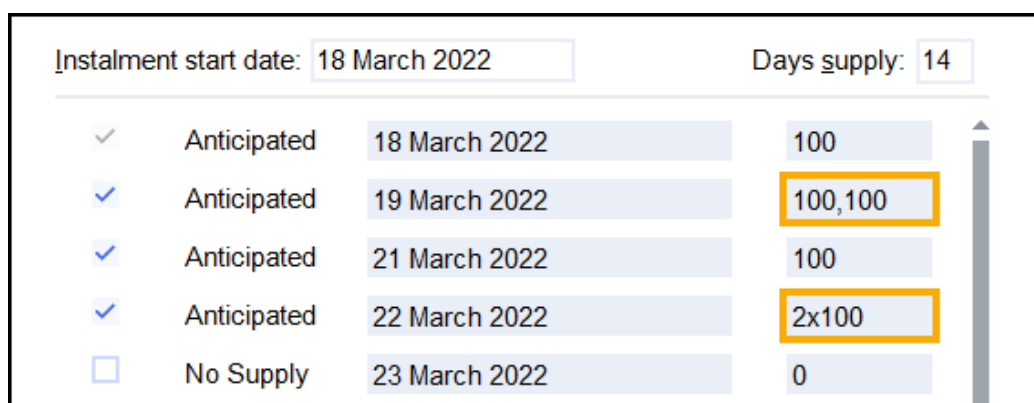


Instalment start date: 18 March 2022 Days supply: 14

<input checked="" type="checkbox"/>	Anticipated	18 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	19 March 2022	200
<input checked="" type="checkbox"/>	Anticipated	21 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	22 March 2022	200
<input type="checkbox"/>	No Supply	23 March 2022	0
<input checked="" type="checkbox"/>	Anticipated	24 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	25 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	26 March 2022	200

Supply from the 23rd is added to the 22nd

- c. In the above example, two instalments are to be dispensed on one label. If two labels are required, enter the appropriate quantity separating with a comma, for example, '100,100', to produce two labels of 100. Similarly you can enter '2x100':





Instalment start date: 18 March 2022 Days supply: 14

<input checked="" type="checkbox"/>	Anticipated	18 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	19 March 2022	100,100
<input checked="" type="checkbox"/>	Anticipated	21 March 2022	100
<input checked="" type="checkbox"/>	Anticipated	22 March 2022	2x100
<input type="checkbox"/>	No Supply	23 March 2022	0




6. Select **OK**  to confirm the instalment schedule.

 **Note** - If you have any quantity remaining, **OK** is inactive and the quantity missing displays in **Shortfall**. You must check the dosages and amend as needed.

 **Training Tip** - Should you need to edit the instalment schedule prior to dispensing you can select **Instalment Schedule** from the **Dispensary** screen.

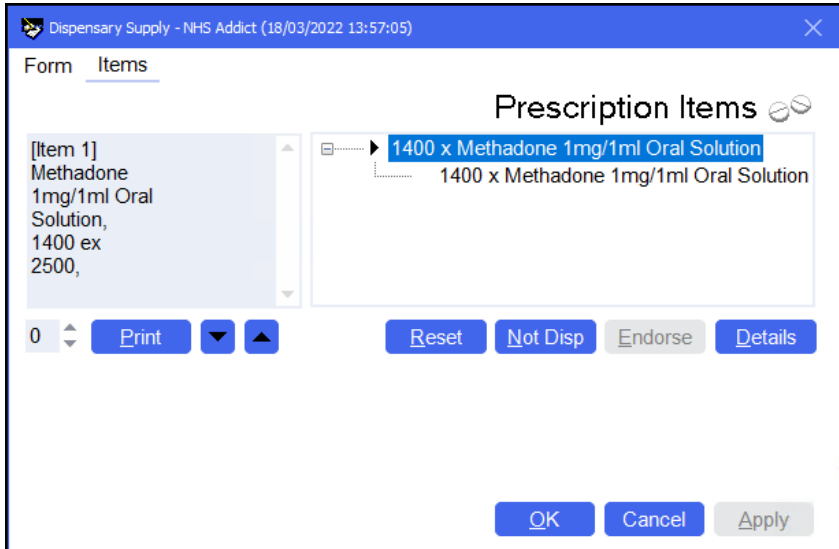
7. Select **Finish** .
8. The **Instalment Label Printing** screen displays, select from:



The dialog box titled "Instalment Label Printing" shows the text "1400 x Methadone 1mg/1ml Oral Solution" and asks "Which instalments would you like to print labels for? (You can always print them later)". At the bottom, there are three buttons: "All", "First", and "None".

- **All** - Select to print all instalment labels.
- **First** - Select to print the first instalment label only.
- **None** - Select to print no instalment labels.

9. If configured, the **Endorsement** screen displays. Select **OK** to defer endorsing until the patient collects all:



The screen shows a "Prescription Items" list with one item: "1400 x Methadone 1mg/1ml Oral Solution". Below the list, there are buttons for "Print", "Reset", "Not Disp", "Endorse", and "Details". At the bottom of the screen, there are buttons for "OK", "Cancel", and "Apply".

The prescription displays on the **Pending** screen with the status **Not endorsed** until endorsed at the end of the instalment schedule. Each instalment displays on the **Instalments** screen.

---

 See [Managing Dispensed Instalments](#) in the **Pharmacy Manager Help Centre** for details.

---

**Please note:**

- When editing a prescription where no instalments are prepared or collected, you need to re-enter the instalment schedule before finishing the dispense.
- You are unable to edit an instalment where some instalments have been prepared or collected, however you can view the instalment details in read-only mode.

# Recording a Pharmacy First Scotland - Standard (MAS) Consultation

## What is a Pharmacy First Scotland - Standard (MAS) Consultation?

The Pharmacy First Service enables patients to get advice and free treatment from a Pharmacist for a range of minor ailments, for example, nasal congestion, migraines, fungal skin infections, eczema.

A patient must be eligible for the Pharmacy First Service before a consultation can take place.

## Who is eligible?

- People registered with the Defence Medical services (even if they are a visitor to Scotland).
- People registered on a permanent basis with a GP Practice in Scotland.
- People registered on a temporary basis with a GP Practice in Scotland (unless they are a visitor to Scotland).
- People who live in Scotland.
- People who are gypsies or travellers in Scotland.
- People who are asylum seekers in Scotland or a dependent of an asylum seeker in Scotland.

To record a Pharmacy First Scotland - Standard (MAS) consultation:

1. From the **Pharmacy Manager Side Navigation Bar** select **ePharmacy**

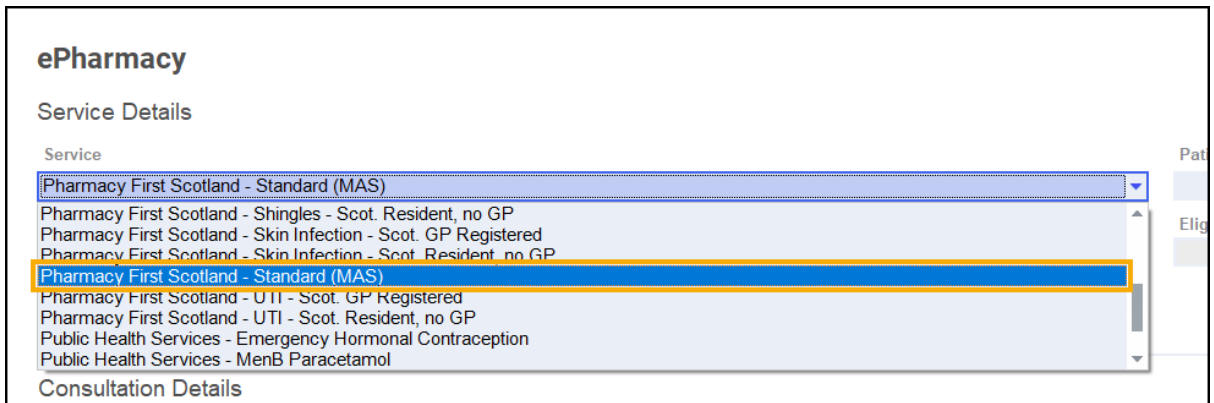


The **ePharmacy** screen displays.



**Note** - You must be logged into **ePharmacy**  in order to record a MAS consultation, see [Logging in to ePharmacy](#) in the **Pharmacy Manager Help Centre** for details.

- From **Service**, select **Pharmacy First Scotland - Standard (MAS)**:



**ePharmacy**

Service Details

Service

Pharmacy First Scotland - Standard (MAS)

Pharmacy First Scotland - Shingles - Scot. Resident, no GP

Pharmacy First Scotland - Skin Infection - Scot. GP Registered

Pharmacy First Scotland - Skin Infection - Scot. Resident, no GP

Pharmacy First Scotland - Standard (MAS)


Pharmacy First Scotland - UTI - Scot. GP Registered

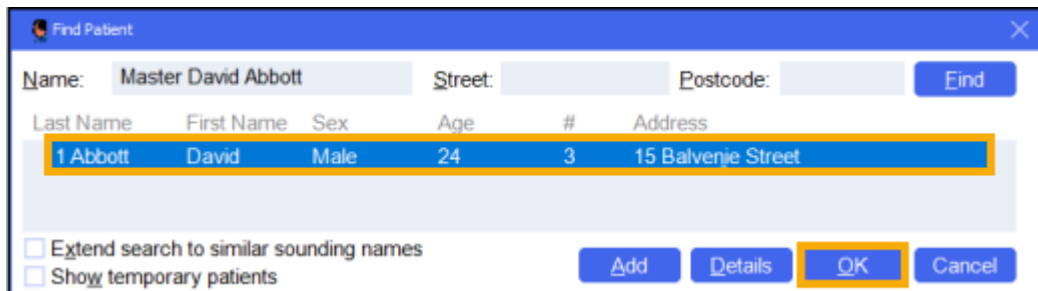
Pharmacy First Scotland - UTI - Scot. Resident, no GP

Public Health Services - Emergency Hormonal Contraception

Public Health Services - MenB Paracetamol

Consultation Details

- From **Patient**, enter the name of the patient and press **Enter** on your keyboard to search for the patient record.
- The **Find Patient** screen displays. Select the appropriate patient and select **OK** :



Find Patient



Name: Master David Abbott Street: Postcode: Find

Last Name	First Name	Sex	Age	#	Address
1 Abbott	David	Male	24	3	15 Balvernie Street

Extend search to similar sounding names

Show temporary patients

Add Details **OK** Cancel

 **Note** - If the patient is not found in **Pharmacy Manager**, select **Add**  to add the patient, see [Adding a New Patient](#) on page 14 for details.


- Pharmacy Manager** checks the eligibility status of the selected patient via the **Electronic Pharmacy Message Store (ePMS)**.

 **Note** - If there is any demographic information missing, you are prompted and the relevant requests display.

 **Note** - To run an additional **Eligibility Status** check, select **Refresh** .

- The **ePMS** responds with either:
  - Eligible** - Continue to record the consultation, or
  - Not Eligible** - The patient is not eligible for a consultation. You are asked to confirm if you wish to proceed with the consultation.

7. Confirm that **Print PFS - Standard Form**  is correct. Amend if required.

 **Note - Print PFS - Standard Form** is set at a system wide level. You can over-ride it on a case-by-case basis by enabling or disabling it as required. This does not affect your system wide settings. See [Configuring Pharmacy First Scotland - Standard \(MAS\) Form Printing](#) in the **Pharmacy Manager Help Centre** for details.

8. From **Consultation Details**, complete as required:



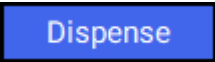
- **Outcome** - Select from:
  - **Medication Prescribed**
  - **Advice Only**
  - **Refer to GP**
- **Notes** - Enter details of the consultation.


 **Important** - Notes are mandatory for a Pharmacy First Scotland - Standard (MAS) service.

- **Message Area** - This area displays any messages where mandatory information is required for a service.

9. Complete the consultation as follows:

### **Medication Prescribed**

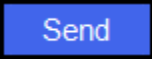
- a. Select **Dispense**  to dispense medications as required.

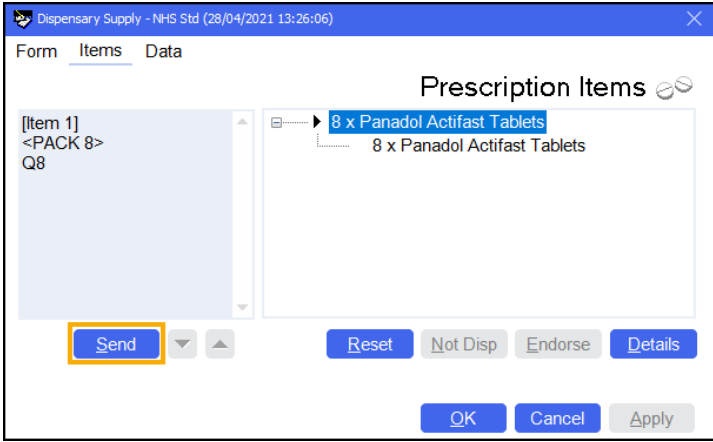
 **Note** - If there are any partially completed prescriptions on the **Dispensary** screen you cannot complete a consultation.

b. The **Dispensary**  screen displays.

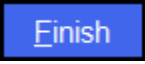
c. Complete dispensing in the usual way and select **Finish** .

 **Note** - If the item selected is not on the Pharmacy First Scotland approved list a message displays, see [Configuring Pharmacy First Scotland - Standard \(MAS\) Approved List](#) in the **Pharmacy Manager Help Centre**.


d. The **Dispensary Supply** screen displays, select **Send**  to endorse and claim for the consultation:





### Advice Only

- Enter the details in **Notes** and select **Finish** . The details of the consultation are sent to the **ePMS**.

### Refer to GP

- Enter the details in **Notes** and select **Finish** . The details of the consultation are sent to the **ePMS**.

 **Training Tip** - To clear the **ePharmacy** screen of all data added, select **Cancel** . No information is sent to the **ePMS**.

# Recording a Universal Claim Framework (UCF) Consultation

The **Universal Claim Framework (UCF)** allows your pharmacy to manage and deliver pharmacy led services from **Pharmacy Manager**, for example, Pharmacy First Scotland, Health Board Service and Epidemic / Pandemic Services and Vaccinations.

To record a **UCF Consultation**:

1. From the **Pharmacy Manager Side Navigation Bar** select **ePharmacy**

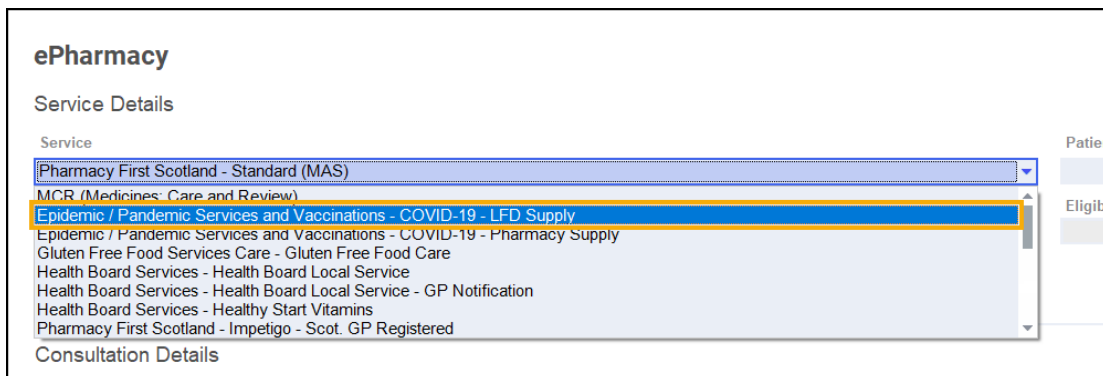


and the **ePharmacy** screen displays.



**Note** - You must be logged into **ePharmacy** ● Logged in in order to record a UCF consultation, see [Logging in to ePharmacy](#) in the **Pharmacy Manager Help Centre** for details.

2. From **Service**, select the service you require:



**ePharmacy**

Service Details

Service

Pharmacy First Scotland - Standard (MAS)

MCR (Medicines Care and Review)

**Epidemic / Pandemic Services and Vaccinations - COVID-19 - LFD Supply**

Epidemic / Pandemic Services and Vaccinations - COVID-19 - Pharmacy Supply

Gluten Free Food Services Care - Gluten Free Food Care

Health Board Services - Health Board Local Service

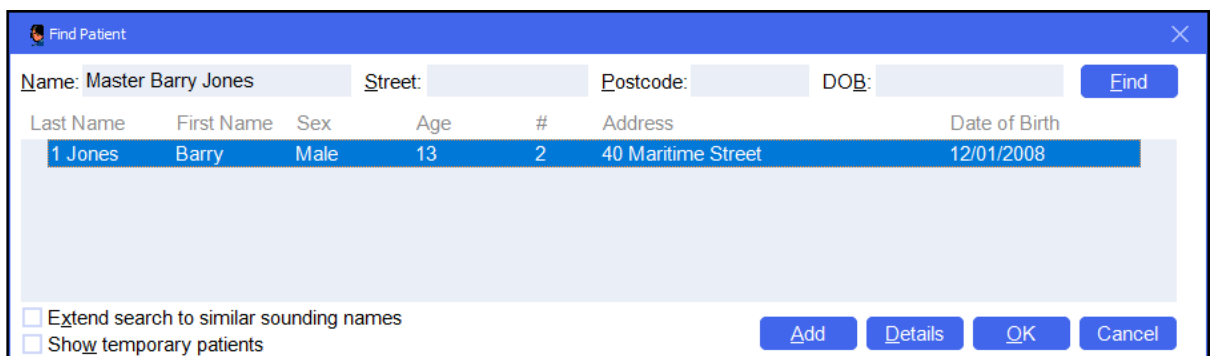
Health Board Services - Health Board Local Service - GP Notification

Health Board Services - Healthy Start Vitamins

Pharmacy First Scotland - Impetigo - Scot. GP Registered

Consultation Details

3. From **Patient**, enter the name of the patient and press **Enter** on your keyboard to search for the patient record.
4. The **Find Patient** screen displays. Highlight the appropriate patient and select **OK** OK:



**Find Patient**

Name: Master Barry Jones Street: Postcode: DOB: Find

Last Name	First Name	Sex	Age	#	Address	Date of Birth
1 Jones	Barry	Male	13	2	40 Maritime Street	12/01/2008

Extend search to similar sounding names

Show temporary patients

Add Details OK Cancel



**Note** - Prescriber displays your **ePharmacy** login details:



ePharmacy	
Service Details	
Service	Patient
Epidemic / Pandemic Services and Vaccinations - COVID-19 - LFD Supply	Master Barry Jones (40 Maritime Street)
Prescriber	
(A123) A 123	

5. If an eligibility check is required for the selected service, **Pharmacy Manager** checks the eligibility status of the selected patient via the **Electronic Pharmacy Message Store (ePMS)**.



**Note** - If there is any demographic information missing, you are reminded and the relevant requests display.

### Eligibility for NHS Pharmacy First Scotland Consultations

- Patients registered with the Defence Medical services (even if they are a visitor to Scotland).
  - Patients registered on a permanent basis with a GP Practice in Scotland.
  - Patients registered on a temporary basis with a GP Practice in Scotland (unless they are a visitor to Scotland).
  - Patients who live in Scotland.
  - Patients who are gypsies or travellers in Scotland.
  - Patients who are asylum seekers in Scotland or a dependent of an asylum seeker in Scotland.
6. The **ePMS** responds with either:
- **Eligible** - Continue to record the consultation.
  - **Not Eligible** - The patient is not eligible for a consultation. You are asked to confirm if you wish to proceed with the consultation.
  - **Patient Not Found** - The NHS record for this patient could not be found. You are asked to confirm if you wish to proceed with the consultation or clear the prompt. Select **Try again**  to run the eligibility check again.
  - **Check Failed** - The eligibility check has failed. You are asked to confirm if you wish to proceed with the consultation or clear the prompt. Select **Try again**  to run the eligibility check again.



7. From **Consultation Details**, complete as required:

Consultation Details

Outcome  
Medication Prescribed

Notes

Record clinical and accuracy checks.


Always print UCF form for this service


Cancel Dispense



- **Outcome** - Select from:
  - **Medication Prescribed**
  - **Advice Only**
  - **Refer to GP**
- **Notes** - Enter details of the consultation.
- **Message Area** - Messages regarding mandatory information required for a service display here for your reference.

8. Complete the consultation as follows:

### Medication Prescribed

- a. Select **Dispense**  to dispense medications as required.


 **Note** - If there are any partially completed prescriptions on the **Dispensary** screen you cannot complete a consultation.

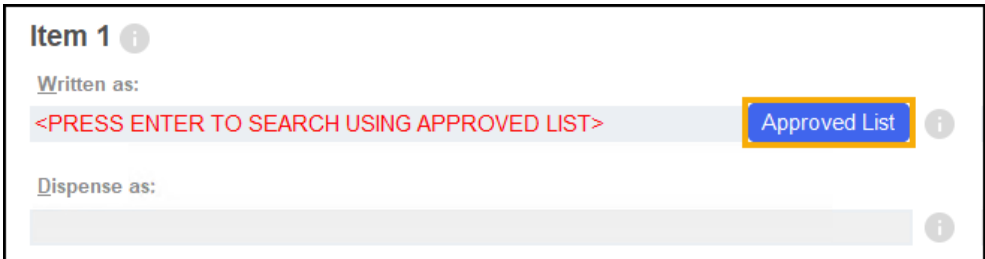
The **Dispensary**  screen displays ready for you to dispense items prescribed. The **CP4** form  is selected by default.


 **Note** - The **CP4** form only selects by default when you access **Dispensary**  via **ePharmacy** .

- b. Enter the number of items and then press **Enter** on your keyboard.
- c. If an approved list is available in **Pharmacy Manager** for the service '<PRESS ENTER TO SEARCH USING APPROVED LIST>' displays in **Written as**, if not **Written as** is blank. Continue as appropriate:

### Approved List Available for the Service











- i. Press **Enter** on your keyboard or select **Approved List**  to view the approved list for the selected service:




 **Note** - If you know the drug to be dispensed you can add it directly in **Written As**. This is checked against the approved list.

In case of a failure, for example, service or internet interruptions, the approved list is not available. If this is the case, you need to select the product manually, a 'The Approved List checking service has not been successful' warning displays:


Warnings:

-  Record clinical and accuracy checks.
-  Press Ctrl+B to show brands, including branded generics, and Ctrl+G to show generics.
-   Notes must be entered to complete this consultation.
-   Please select an alternative generic product. Brands cannot be prescribed for this service.
-   **The Approved List checking service has not been successful.**
-  Directions provide inadequate information for dosage checking. Elderly patient may need alterations from normal dosages.
-  Endorsement (<PACK 20>, Q0)


 **Important** - If you dispense an item that is not on the approved list, you may not be paid.






Confirm the warning before continuing.

ii. The **Approved List** screen displays, choose



**SELECT PRODUCT**  next to the item required:

**← Approved List**

Search products   FILTER

Product	Discontinued	
Aciclovir 400mg dispersible tablets 56 tablet	NO	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Select the product required</div>  
Aciclovir 800mg dispersible tablets 35 tablet	NO	
Aciclovir 400mg tablets 56 tablet	NO	
Aciclovir 800mg tablets 35 tablet	NO	











1 - 4 of 4    Rows per page: 10 ▾

 **Training Tip** - If required, you can filter to include discontinued items, simply select **FILTER**  and select **Show discontinued items**.

- iii. The **Dispensing** screen populates with the selected product.

If you enter an item in **Written As** that is not on the approved list, a warning '*The item you have selected is outside of the Approved List*' displays:


Warnings:

-  Record clinical and accuracy checks.
-  Press Ctrl+B to show brands, including branded generics, and Ctrl+G to show generics.
-   Notes must be entered to complete this consultation.
-   Please select an alternative generic product. Brands cannot be prescribed for this service.
-   **The item you have selected is outside of the Approved List.**
-  Directions provide inadequate information for dosage checking. Elderly patient may need alterations from normal dosages.
-  Endorsement (<PACK 20>, Q0)


Confirm the warning before continuing.

### Approved List Unavailable for the Service


- i. Enter the medication and then press **Enter** on your keyboard:

**Item 1** 

Written as:



Dispense as:




- d. Complete dispensing in the usual way and select **Finish** 


---

 See [Dispensing a Paper Prescription](#) in the **Pharmacy Manager Help Centre** for details.

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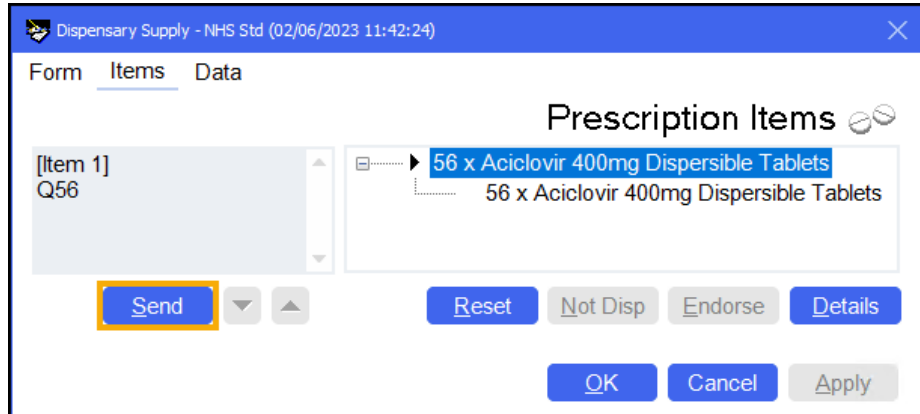
 **Important** - When dispensing of a Control Drug (Schedule 2 and 3) is not permitted on the selected service, the following message displays '*This product is not permitted to be prescribed on this service*'.


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 **Training Tip** - Instead of finishing the dispense you can select **Save to Pending** and the prescription displays on the **Pending** tab.

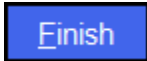
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- e. The **Dispensary Supply** screen displays, select **Send**  to endorse and claim for the **UCF Consultation**:

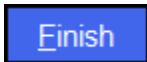



 **Note** - If any of the mandatory information is missing, the **Send** option is inactive. The prescription displays in the **Pending** tab on the **Side Navigation Bar** ready for completion and claiming.


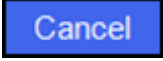
### Advice Only

- Enter the details in **Notes** and select **Finish** . The details of the consultation are sent to the **ePMS**.

### Refer to GP

- Enter the details in **Notes** and select **Finish** . The details of the consultation are sent to the **ePMS**.


 **Important** - Where a CHI number is mandatory and not known, you must use the 'not Registered at a Scottish GP' variant of the service as the CHI number is not optional.

 **Training Tip** - To clear the **ePharmacy** screen of all data added, select **Cancel**  and no information is sent to **ePMS**.

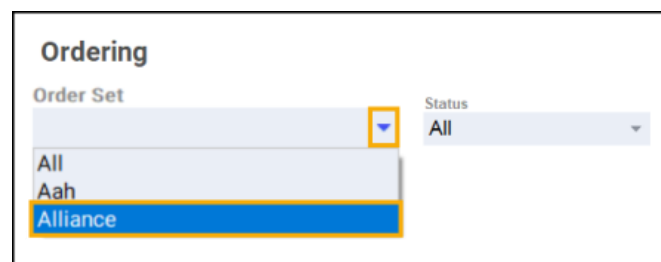
# Stock Control

## Adding Items to an Order


To add items to an order:

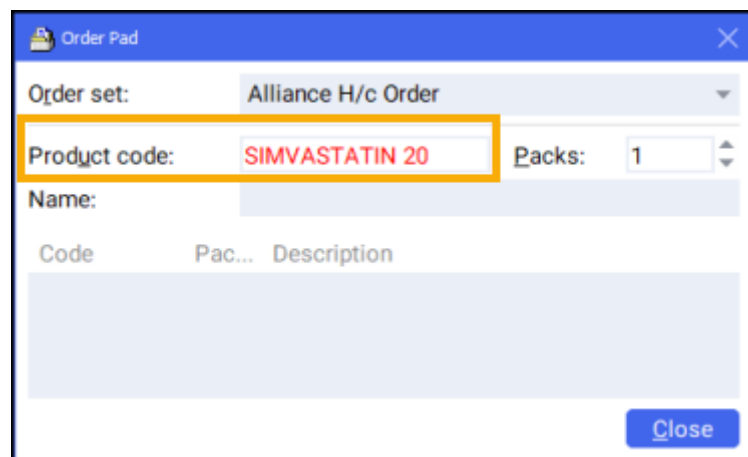
1. From the **Pharmacy Manager Side Navigation Bar** select **Stock & Ordering**  and then select **Ordering**.

2. From **Order Set**, select the order set you wish to order from:




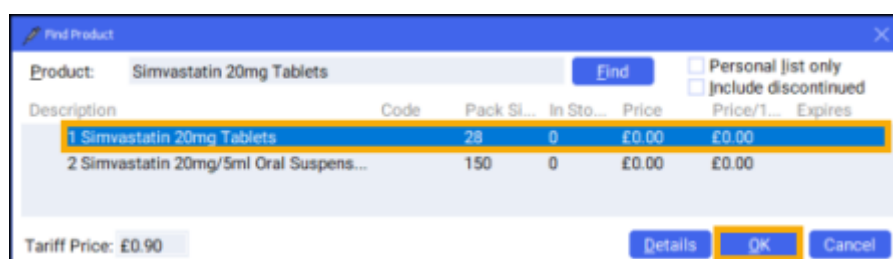
The screenshot shows the 'Ordering' screen. There is a dropdown menu for 'Order Set' with a list of options: 'All', 'Aah', and 'Alliance'. The 'Alliance' option is highlighted in blue. To the right, there is a 'Status' dropdown menu set to 'All'.

3. Select **Order pad**  and the **Order Pad** screen displays. Enter the **Product code**, for example, SIMVASTATIN 20, and press **Enter** on your keyboard:



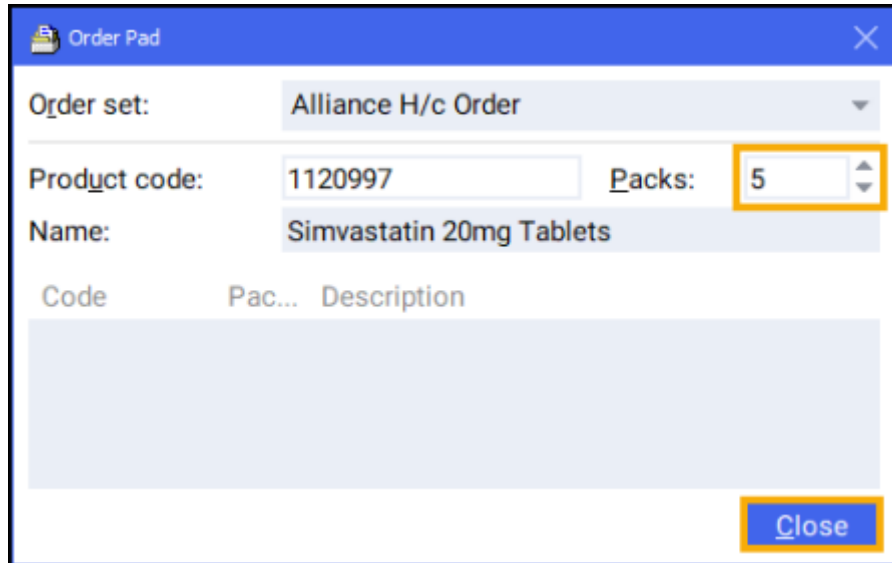
The screenshot shows the 'Order Pad' screen. The 'Order set:' dropdown is set to 'Alliance H/c Order'. The 'Product code:' field contains 'SIMVASTATIN 20' and is highlighted with a yellow border. The 'Packs:' field contains '1'. Below these fields is a table with columns 'Code', 'Pac...', and 'Description'. A 'Close' button is at the bottom right.

4. The **Find Product** screen displays. Highlight the desired product and select **OK** :



The screenshot shows the 'Find Product' screen. The 'Product:' field contains 'Simvastatin 20mg Tablets'. There are checkboxes for 'Personal list only' and 'Include discontinued'. Below is a table with columns: 'Description', 'Code', 'Pack Si...', 'In Sto...', 'Price', 'Price/1...', and 'Expires'. The first row is highlighted in blue: '1 Simvastatin 20mg Tablets', '28', '0', '£0.00', '£0.00'. The second row is: '2 Simvastatin 20mg/5ml Oral Suspens...', '150', '0', '£0.00', '£0.00'. At the bottom, there is a 'Tariff Price: £0.90' and buttons for 'Details', 'OK', and 'Cancel'.


- The **Order Pad** screen displays. Enter the number of **Packs** required and press **Enter** on your keyboard:

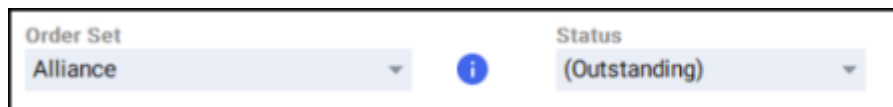



- Select **Close**  and the item is placed on order.

## Sending an Order

After you have checked through your orders, you must send the order through to the wholesaler. To send an order:

- From the **Pharmacy Manager Side Navigation Bar** select **Stock & Ordering** . Select **Ordering**.
- From **Order Set**, select the order set that you wish to send the order to.
- From **Status**, select **Outstanding** to include all pending and previously rejected orders:



- Highlight the required item or press and hold **Ctrl** on your keyboard to highlight multiple items and then select **Send** :

Product	Size	Code	Order Set	Status	Packs	Sent
Amoxicillin 250mg Capsules	21	P1077346	Alliance H/c Order	Pending	1	
Aspirin 75mg g/r Tablets	28	P1098342	Alliance H/c Order	Pending	3	
Bendroflumethiazide 5mg ...	28	P1216498	Alliance H/c Order	Pending	3	
Enalapril 20mg Tablets	28	P1079615	Alliance H/c Order	Pending	2	
Lactulose Solution	300	P1215227	Alliance H/c Order	Pending	3	
Levothyroxine Sod 100mcg...	28	P1089911	Alliance H/c Order	Pending	3	
Methadone 1mg/1ml Oral ...	100	P1057041	Alliance H/c Order	Pending	1	

At the bottom of the table, there are buttons for 'Item details', 'Order pad', 'Add item', 'Delete', and a highlighted 'Send' button.

- The order is sent.