

Pharmacy Manager 14.0 Release Guide

Version 2.0

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Registered name: Cegedim Rx Ltd. Registered number: 02855109 Registered name: In Practice Systems Limited. Registered number: 01788577 Registered address: The Bread Factory, 1a Broughton Street, London, SW8 3QJ

Website: <u>https://www.cegedimrx.co.uk</u>





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Pharmacy Manager Release 14.0

Pharmacy Manager 14.0 introduces the following features:

All Countries

• Address Search - We have updated the address search to provide a simple, faster and flexible search across all addresses in the UK:

| Find an address | × |
|---|-------|
| Type at least 3 characters of an address or a postcode to begin. | |
| e.g. 'PR26 7QN' or 'Marathon Place' | |
| (i) Adding as much detail as possible about an address will help to narrow your search results. | ess |
| | |
| CANCEL | NFIRM |

Please note the following:

- There is now no requirement to enter a licence key to use the address search.
- There is no limitation to postcodes, all UK addresses are available.
- The Bulk Operation Postcode Database has been removed from the system.

See <u>Adding Addresses</u> for more details on the address search.



• Handout method selection - The Patient Details screen now displays a Handout Method drop-down, the options are:

| 👰 Patient Details - (U | nknown Patient) | | | | | | | × |
|--------------------------------------|---------------------|----------|-----------------------|---------------------|-------------------------------------|----------------------------------|----------------|--------------------|
| Patient | Doctor | Conditio | ons | Medication | ŀ | History | | Other |
| Suppression | Suppressions Exemp | | Re | peat Rx | 6 | ePrescr | iption Up | pdates |
| Patient number: | 1 | _ | | F | Perso | nal [| Detail | s 🧕 |
| <u>_</u> iue. | | • | | <u>S</u> ex: | Unknow | wn | | - |
| Eirst name: | | | | Do <u>B</u> : | | | | |
| Other <u>n</u> ame(s): Last name: | (unknown Patient |) | | Ag <u>e</u> : | 0 0 | <u>G</u> roup: | Adult | - |
| Ethnicity (u): | Not stated | | | NHS No (<u>k</u>) |): | | Nomi | nations |
| (<u>_</u>) | | | | C <u>H</u> I No: | | | | |
| Temp Address | | | | N <u>I</u> No: | | | | |
| PR26 (<u>6</u>) | | | | Ten Pat | nporary p ient is ex fixed ab | patient (e <u>m</u> pt ode | Ap | p User |
| Handout (<u>9</u>): | In store collection | 1 | | | ient is de | eceased | 1 (<u>8</u>) | |
| Location (0): | In store collection | | | | | | | |
| Post <u>c</u> ode: | Robot Collection | | | | | MU | JR Leaf | et (<u>w</u>) |
| Home phone (1): | | I | /lobile (<u>4</u>): | | | Weld | ome Le | aflet (<u>q</u>) |
| Work phone (2): | | Main o | ontact (7) Ur | known | - | Regi | stration | Card (j) |
| E-Mail (<u>5</u>): | | | | | | Ade | dress La | bel (<u>z</u>) |

- In store collection (Default)
- Delivery (Automatically chosen if the previous checkbox Home Delivery Service Required was checked)
- Robot Collection
- Handout method icon Depending on the handout method selected in Patient Details a relevant icon displays on the eMessages screen:

| Name | Handout | 8 | s 🛪 | 🖹 Expiry | Action by | Status | Message Type | Prescription Type |
|---------------------------|---------|---|-----|----------|------------------|-----------------------------------|------------------------|-------------------|
| 📲 🖻 1 Mr Ant Simon Brown | | 8 | | 15/02/20 | 18/08/2021 12:30 | In progress - Awaiting Collection | Nominated Prescription | Acute |
| 2 Mr Dave Jason Jones | | 8 | | 17/02/20 | 18/08/2021 12:31 | New - Ready to dispense | Nominated Prescription | Acute |
| 3 Mr Dave Paul Phillips | | 8 | | 17/02/20 | 18/08/2021 12:31 | New - Ready to dispense | Nominated Prescription | Acute |
| 📲 🖻 5 Mr Dave Dave Wilson | | 8 | | 15/02/20 | 19/08/2021 11:04 | In progress - Awaiting Collection | Nominated Prescription | Acute |
| 📲 🖻 6 Mr Dave Dave Brown | | 8 | | 15/02/20 | 19/08/2021 11:04 | In progress - Awaiting Collection | Nominated Prescription | Acute |
| 7 Mr Paul Graham Williams | 26 | 8 | | 17/02/20 | 18/08/2021 12:31 | New - Ready to dispense | Nominated Prescription | Acute |
| 8 Mr Mark Simon Johnson | 24 | | | 17/02/20 | 18/08/2021 20:03 | New - Ready to dispense | Nominated Prescription | Acute |
| 9 Mr Dave Ant Bloggs | 24 | | | 17/02/20 | 18/08/2021 20:03 | New - Ready to dispense | Nominated Prescription | Acute |
| | | | | | | | | |





- Robot Collection



• **Robot Collection Clinical Check** - Where the handout method chosen is **Robot Collection**, if the prescription contains items that are Controlled Drugs or Fridge Items a warning displays:

| nio X |
|--|
| i A Fridge/ CD item |
| This patient has a handout method selected as Robot Collection. Please note that this dispense contains either a controlled drug or a fridge item. |
| <u>о</u> к |

• Mobile Number Validation - For patient's that have a handout method of Robot Collection a valid format mobile number is mandatory. A warning displays if the mobile number is not a valid format:

| Handout (<u>9</u>): | Robot Collection | | | Always | verify is dec | collection eased (<u>8</u>) | |
|---------------------------------|---|------------------------|--------------|-------------|------------------|----------------------------------|--------------------|
| Location (0): | | | | | | | |
| Postcode: | IV15 9HL | Fax (<u>3)</u> : | | | | MUR Leaf | let (<u>w</u>) |
| Home phone (1): | 0119966600 | Mobile (<u>4</u>):04 | 147 | | | Welcome Le | aflet (<u>q</u>) |
| Work phone (2): | | Main contact (7) U | nknown | ~ | | Registration | Card (j) |
| E-Mail (<u>5</u>): | | | | | | Address La | abel (<u>z</u>) |
| Robot collection please enter o | on patients require a ne before saving | a valid format UK ı | nobile p | ohone nur | nber, | | |
| Inter <u>v</u> ene | | | <u>D</u> ele | te <u>C</u> | <u>)</u> K | Cancel | <u>A</u> pply |

 Patient Consent - On selecting Robot Collection as a handout method users are reminded to record the patient's consent to sharing their mobile number and to review annually:

| Handout (<u>9</u>): | Robot Collection | | - | Always | <u>v</u> erify is dec | / collection ceased (<u>8</u>) |
|--------------------------------|-----------------------------------|----------------------|--------------|--------------|--------------------------|-------------------------------------|
| Location (0): | | | | | | |
| Post <u>c</u> ode: | IV15 9HL | Fax (<u>3</u>): | | | | MUR Leaflet (w) |
| Home phone (<u>1</u>): | | Mobile (<u>4</u>): | | | | Welcome Leaflet (g) |
| Work phone (2): | | Main contact (7) | Unknowr | י ד ו | | Registration Card (j) |
| E-Mail (<u>5</u>): | | | | | | Address Label (<u>z</u>) |
| Robot Collecti and reviewed | on is selected. Plea annually. | ase ensure that p | atient co | onsent is re | ecord | ed |
| | | | | | | |
| Inter <u>v</u> ene | | | <u>D</u> ele | ete 🧕 🧕 | <u>)</u> K | Cancel <u>Apply</u> |



Scotland Only

• Calculate MCR due date option - There is now an option in Pharmacy Details to set how the MCR due date is calculated.

Note - This is also known as CMS (Chronic Medication Service).

See <u>Calculating MCR Due Date</u> for more details.

• The View History screen Items tab now includes an MCR no. column that shows the iteration of the prescription:

| 🖶 View History | | | | | |
|--|--|--|--|---|--|
| Items Forms eMes | sages Interv | ventions | | | |
| Patie <u>n</u> t: | | | 🗙 Clear | Prescrip | otion Items⊘© |
| When: Last 30 days | <u> </u> | n: 14 May 2021 | | <u>T</u> o: 21 May 2021 | Display |
| Date | MCR no. | Receiver | Description | | Las Firs |
| 14/05/2021 10:10 14/05/2021 10:10 14/05/2021 10:10 04/05/2021 15:03 04/05/2021 15:02 04/05/2021 15:02 04/05/2021 15:02 | 2 of 6 2 of 6 2 of 6 1 of 6 1 of 6 1 of 6 | Mrs Elizabeth Duncan (14 Will Mrs Elizabeth Duncan (14 Will Mrs Elizabeth Duncan (14 Will Mr James Brodie (15 Braefoot Mrs Elizabeth Duncan (14 Will Mrs Elizabeth Duncan (14 Will Mrs Elizabeth Duncan (14 Will | 224 x Panadol Adve 560 x Ventolin 2mg/ 56 x Accolate 20mg 224 x Panadol Adve 56 x Accolate 20mg 224 x Panadol Adve 560 x Ventolin 2mg/ | Ince 500mg Tabl 5ml Syrup SF Tablets (PI) Ince 500mg Tabl Tablets (PI) Ince 500mg Tabl 5ml Syrup SF | Du Eliz Du Eliz Du Eliz Bro Ja Du Eliz Du Eliz Du Eliz Du Eliz |
| Loaded 7 Items. | | | | <u>R</u> efresh | <u>E</u> dit <u>D</u> etails |
| | | | | | <u>C</u> lose |

This is particularly useful for users to know exactly which iteration of the MCR they are editing.



• MCR Treatment Summary Report (TSR) - The MCR Treatment Summary Report (TSR) screen includes a check box to only show patients with completed MCR cycles that are ready to send:

| 🐵 MCR Treatment Summary Report | × |
|---|---|
| Date Range | |
| □ Ignore date filter (show all patients with MCR history) | |
| From: 30 March 2020 To: 24 May 2021 | |
| MCR Patients | |
| Name: Eind | |
| Only show completed MCR cycles ready to send | |
| Image: Select all patients Image: Mr James Brodie, 15 Braefoot Terrace Image: Mrs Elizabeth Duncan, 14 Willowbrae Road Image: Mrs Elizabeth Duncan, 14 Willowbrae Road Image: Mrs Victoria Grieve, 37 Lothian Road Image: Mrs Thirtyfivecharacterlimitsurnam Marshall, 43 Image: Miss Amy Williams, 10 Waterloo Place | No patient selected |
| < | Pre <u>v</u> Ne <u>x</u> t <u>U</u> pdate |
| | Preview Send Edit Cancel |

See <u>MCR Treatment Summary Report (TSR)</u> for more details on running a Treatment Summary Report.



Adding Addresses

Within **Pharmacy Manager** the same method is used to search for and add addresses on the following screens:

- Patient Details
- Nursing Home Details
- Institution Details

New addresses can be added in the following ways:

Address Database Search

You can quickly search for and validate a patient's address from **Pharmacy Manager**. To do this:

1. From the address entry screen select **Postcode**

The Find an address screen displays:

| Type at least 3 characters of a postcode to begin. | n address or a |
|---|--------------------------------------|
| e.g. 'PR26 7QN' or 'Marathon Place | e' |
| Adding as much detail as pos will help to narrow your search | sible about an address n results. |
| | |

Training Tip - In order to use the address search you must have a pharmacy name and postcode set in Tools - System Settings - Pharmacy Details.

- 2. Search for the address with as much information as you can, for example the postcode and house number.
- 3. Select the required address from the drop-down list.

| 4. | Select Confirm | Confirm | to accept the selected address, or select |
|----|-----------------------|---------------|---|
| | Cancel | to close the | screen without selecting an address. |
| | If an address ha | as been selec | ted, the address populates and the |
| | Postcode icon | turns blu | ue to indicate the address is validated. |



Manual Entry

You can simply add the address in the same way as you address a letter:

- Number/Name, Road Name
- Locality
- Town
- Postcode





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 Menu select Tools - System Settings -Pharmacy Details - ePharmacy:

| 📫 Pharmacy Det | ails | | | | | | |
|--|--|-------------------|--------------|--|---------------------------------------|----------------|----------------------------|
| Pharmacy | Licence | Dispensing | Charging | Checking | Products | s Ordering | Product Rules |
| Events | Postcode | ePharma | cy S | canner | Patient Sele | ection Wizard | Repeat Rx |
| AMS/MC | R l | eaflet Printing | El | ectronic Mess | aging | Responsibl | e Pharmacist |
| Realtime | Backup | Patient Ale | rts | Keystroke Re | eduction | eMAR | FMD |
| Setup | Setup ePhan | macy services | | | | ePha | rmacy 💬 |
| ePharmacy | Data Refres | h | | | | | |
| Active Ser | vices VMAS | 6 | V AMS | ; | ✓ MC | R | UCF |
| General eF | harmacy det | ails | | | | | |
| Webservice | URL: | http://127.0.0.1 | 1:9789 | | | | |
| EPOC Cod | e: | 00000000 | | | | | |
| Message D | estination: | 10100003 | | | | | |
| Sequential I | UPN Counter | 000007 | | | | | |
| Sequential I | MCR Counter | 000000 | | | | | |
| XML Schen | na Path: | C:\Program F | iles\NDC\Ph | armacy\Datal | base\System | \Schemas\EPS | Schem 🖻 |
| Prompt for Print MAS s MCR Regis | user on Login status on Bag stration Alert | : Label: Disat | ole automate | Advanced d registration Print MA | Logging: 🗌 updates: 🗌 S Form: 🗸 | Calculate MCF | R due date on te ate |
| | | | | | | <u>O</u> K Can | cel <u>A</u> pply |

- 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 will be calculated on the dispense date and then will update once the prescription is collected.

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



MCR Treatment Summary Report (TSR)

Within **Pharmacy Manager** you can run an **MCR Treatment Summary Report** for patient(s) that are in the process or have finished a course of treatment. This displays all dispensing and support activity.

TSRs can also be viewed or printed and are intended for patient, GP and pharmacist use. Typically, they will produced after the last iteration on the prescription to request a repeat prescription. However, re-ordering can occur at any stage of a serial prescription item's dispensing history. It can occur, for example, to synchronise two or more prescriptions to have the same starting date. However, if a TSR is sent early, any subsequent repeat iterations will be deleted.

To run this report:

- 1. From the Pharmacy Manager Side Navigation Bar, select Reports
- 2. From the list of available reports, select **MCR Treatment Summary Report** and select **Preview**:

| 😨 Phan | macy Manager | | | - 🗆 × |
|-------------|--|---|--------|-------------|
| n∰ a | File Tools Help 📃 Quick Ad | Patient V Search for a patient | Q | 4 |
| ≡ | Reports | | | i≣ View |
| ^ | Category All Show data ex | ports | | New Report |
| B | Name | Description | | * |
| | Conditions Conditions Dispensed Item Report EPS R2 (2)min Totals (FP34o) Individual Intervention Report Intervention Totals (FP34o) Individual Intervention Report Intervention Statistics Report Low/Dead/Excloses Stock MCR Calient Status Report MCR Parked Prescriptions Report MCR Parket Status Report MCR Parket Status Report MCR Data Statistics Report Messing TSR Statistics Report Messing TSR Statistics Report Messing TSR Statistics Report Messing TSR Statistics Report Messing Unit Report Messing Unit Report Messing Unit Report Messing Unit Report Parket History Patient History Patient Report Prescription Throughput report Product Usage | List all conditions Report on inters dispensed with chosen criteria Reports on all potential duplicate products Produce FP34 Report between chosen date range Report on interventions for a chosen patient Report on interventions with chosen criteria Statistics report on interventions made in a chosen period List products with selected stock levels List patients based on chaim states Report on MCR scripts that have been parked List the patient's MCR registration status List methods based on ALCR proceed to the stock of the stock Report on MCR scripts that have been parked List the patient's MCR registration status List methods based on ALCR proceed on the stock Report on MCR scripts that have been parked List the patient's MCR regostration status List methods bubmissions Report Produce patients who have been non-compliant List all patients who are OAPs List all patients who have been non-compliant List patients who chosen criteria Report on Personal List Amendments List all patients medication history List all patients medication history List all patients who chosen criteria Report on Personal List Amendments List all patients with chosen criteria Report on Personal List Amendments List all patients with chosen criteria Report on products usage | | |
| \$ | Report details | | Delete | Preview Run |



The MCR Treatment Summary Report screen displays:

| MCR Treatment Summary Report | × |
|--|---|
| Date Range Ignore date filter (show all patients with MCR history) From: 30 March 2020 Tg: 24 May 2021 MCR Patients Name: Eind | |
| Only show completed MCR cycles ready to send Select all patients Mr James Brodie, 15 Braefoot Terrace Mrs Elizabeth Duncan, 14 Willowbrae Road Mrs Elizabeth Duncan, 14 Willowbrae Road Mrs Thirtyfivecharactertimitsurnam Marshall, 43 Miss Amy Williams, 10 Waterloo Place | No patient selected |
| < | Pre <u>v</u> Ne <u>x</u> t <u>U</u> pdate |
| | Preview Send Edit Cancel |

3. Set the **Date Range** as required or place a tick next to **Ignore date filter** (show all patient's with MCR history):

| 1 | Date R | ange | | |
|---|----------------|------------------------|--------------|----------------------|
| | <u>I</u> gr | nore date filter (show | all patien | ts with MCR history) |
| I | F <u>r</u> om: | 30 March 2020 | T <u>o</u> : | 24 May 2021 |

- 4. If you want to view only patient(s) with completed MCRs place a tick next to **Only show completed MCR cycles ready to send**.
- 5. Search for a patient and select the patient's name.
- 6. The highlighted patient's details display on the right side of the screen:

| 🖶 MCR Treatment Summary Report | X |
|--|--|
| Date Range Ignore date filter (show all patients with MCR history) From: 11 June 2020 To: 05 August 2021 MCR Patients Name: Eind Only show completed MCR cycles ready to send Select all patients Image: Master David Abbott, 15 Balvenie Street Image: Image: Master David Abbott, 17 Crannach Road | Mr James Buchanan CHI: 02105889 17 Crannach Road West Ross Item 1 [K9999999SDS0002J] Amlodipine 5mg tablets Supply Date: 06-05-2021 Qty Prescribed: 168 Quantity dispensed to date: 168 Total to be dispensed: 168 tablet(s) Number of dispensing events: 6 Defer Do not repeat Reguest repeat |
| | Date by: 10 May 2021 Comment: Request urgently needed please Prey Next |
| | Log in <u>P</u> review <u>S</u> end <u>E</u> dit <u>C</u> ancel |



7. Select from the following:

Defer (Default)

If you are undecided whether there needs to be a repeat requested, select the **Defer** option:

- a. Select Defer.
- b. Select **Update** to confirm the changes.

Do not repeat

If you do not wish to request a repeat for an item, select **Do not repeat**:

- a. Select **Do not repeat**.
- b. Add any comment that you wish to pass on to the Prescriber.
- c. Select **Update** to confirm the changes.

Request repeat

To request a repeat prescription:

- a. Select Request Repeat.
- b. Input the date of the request.
- c. Add any comment that you wish to pass on to the Prescriber.
- d. Select **Update** to confirm the changes.

Note - When there are several potential repeat items, each has to be requested. Use the **Prev** and **Next** buttons to switch between the multiple items.

8. The comment text is added to the patient's TSR.



9. Select **Preview** to dis

to display the TSR exactly as it will be seen by

the recipient prescriber:

Page 1

| Report R | Report Reference: Not Assigned | | | | | Reporting Date: 06/08/2021 | | | | |
|---|--------------------------------|---|--|----------------------|--|----------------------------|---|----------------------------|--|--|
| Patient: Patient Registered for MCR at: | | Ian Poole 11 A ST PATICICK SOUARE EDINBURGH MIELOTHIAN EH9 BEZ Test Pharmact Test Pharmacy Sodtand PR28 70N | | CH Da Se | CHI Number: Date of Birth: Sex: Responsible Pharmacist: GPhC Code: Pharmacy Code: Tel: | | 2407911253 24 July 1991 Male Test Pharmacist 1234 1234 | | | |
| | | | | Re GP Ph Te | | | | | | |
| ICR Repeat Request: | | | | | | | | | | |
| | Pharmacy Requ | ires Nev | w Prescriptions by: 03/09/2021 | | | | | | | |
| UPN (Medication Term) | Prescribed Date | ltem | Description | | Quantity Prescribed | Dispensing Frequency | Repeat Indicator | Repeat Notes (Optional) | | |
| K10005000006RMAW | 06/08/2021 | 1 | mirtazapine orodispersible tablet 45mg | | 168 | 8 Weekly | Yes | | | |
| (24 weeks) | | 2 | levothyroxine tablets 100micrograms | | tablet(s) 168 tablets | 8 Weekly | Yes | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Page 2

| | | | | one outning re | | | |
|-------------------------------|--------------------|--|---|-----------------------------|------------------------|--------------------------|----------------------|
| Report Re | eference: Not As | signed | | Reporti | | | |
| ICR Dispensing Summa | iry: | | | | | | |
| Prescribing GP: | | Christine Green 56 Canaan Lane Morningside Edinburgh Eastlothian | | GMC Code: Practice Code: | 1111112 10005 | | |
| JPN Medication Term) | Prescribed Date | item | Description (Dispensing Frequency) | Quantity Prescribed | Quantity Dispensed | Collected Date | Cancellation Date |
| (10005000006RMAW 24 weeks) | 06/08/2021 | 1 | mirtazapine orodispersible tablet 45mg (Every 8 Weeks) | 168 tablet(s) | 56 tablet 56 tablet | 24/06/2021 06/08/2021 | |
| | | 2 | levothyroxine tablets 100micrograms (Every 8 Weeks) | 168 tablets | 56 tablet 56 tablet | 24/06/2021 06/08/2021 | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Delienti las Deels, CIII e | 0: 2407911253 | | Page 2 | | | | |

- 10. Select **Edit** to access the patient's details.
- 11. To send the TSR, place a tick next to the patient(s) or to send for all patients place a tick next to **Select all patients**.
- 12. Select **Send** to transmit the TSR to the Electronic Pharmacy Message Store (ePMS).

Note - You must be logged in to **ePharmacy** with your GPhC number to send the TSR.