



# Your route to the pharmacy contract



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## Introduction

Welcome IntelliPharm, your route to the Pharmacy Contract.

This package will allow you to trial the full version of IntelliPharm for a 14 day no obligation period. If you then choose to purchase IntelliPharm, for the one off fee we will unlock the following:

- Fully activated version of IntelliPharm with free online updates
- Support documents for implementing the pharmacy contract
- Standard Operating Procedure templates
  - o to have a look at a examples of the contents of the SOP's these can be found on our website at [www.intellipharm.co.uk](http://www.intellipharm.co.uk)

# Core Features of IntelliPharm

- **Specials & Extemp Register**  
Simple retrieval of data allows making ADR recording very easy.
- **Dispensing Error Log**  
Makes entering errors much easier, program ensure all required data for a full error log is entered consistently at all times. If your pharmacy has other dispensary staff apart from a pharmacist, there will need to be a way to ID who dispensed and checked the dispensed medication to make the required inputs.
- **Dispensing Error Reports**  
Produces a series of reports which will detail the type & nature of errors e.g. miss, near miss, labelling or wrong item dispensed errors and the staff committing them in numerical and percentage format. Reports can be used as part of staff appraisals and be sent to the superintendent
- **Interventions, Referral & Advice for POM's**  
Ensures that all required data for a full entry is entered consistently at all times.
- **infoPoint:**  
Central point to record & view professional and staff details below:
  - **Core & contracted hours**  
HN1 form details will be recorded on the system which can be amended and allows the forms to be printed off and submitted to the PCT.
  - **Link to SOP's**  
Ease of access for locums and ensures all professional information is centered on intelliPharm
  - **Staff Details**  
Records full staff details including job titles & staff qualifications. Electronic copies of staff certificates can be linked here or detail where they are held. Will also require a complaints manager and clinical governance lead to be assigned to staff member(s). When a staff who is appointed these roles leaves the system will alert you to assign some other staff. Staff who have a role in the dispensing process will feed into the options offered in the dispensing error log.
  - **Locum Details**  
Can record locum details and performance ratings, allowing you to search locums who have worked at the pharmacy by various criteria.
  - **Contacts & information for professional services**  
Records the names and contact details of key persons which may need to be contacted regarding aspects of professional services. For ES4 records the PCT health promotion campaigns and will issue alerts when a campaign is due to start and end. The information is displayed in categories for ease of locating & viewing.
  - **Certification & Documentation**  
Electronic copies of these can be linked to this area or record where they are stored. intelliPharm will list the mandatory ones required under the contract e.g. waste exemption licence or data protection. If a certificate needs renewing you can set up alerts for when it expires making sure you have current ones at all times.

- **ROTA & OOH service**  
Record the dates for these alerting you when they are due. Can enter comments which will be flagged up with the alert e.g. if phone part of the OOH service who to hand it to next.
- **Devices Requiring Calibration**  
Records details of devices which are used in the pharmacy or for professional services e.g. min/max thermometer or CO monitor that require calibration. Allows electronic copies of the calibration certificate to be linked to the device details or record where they are stored.

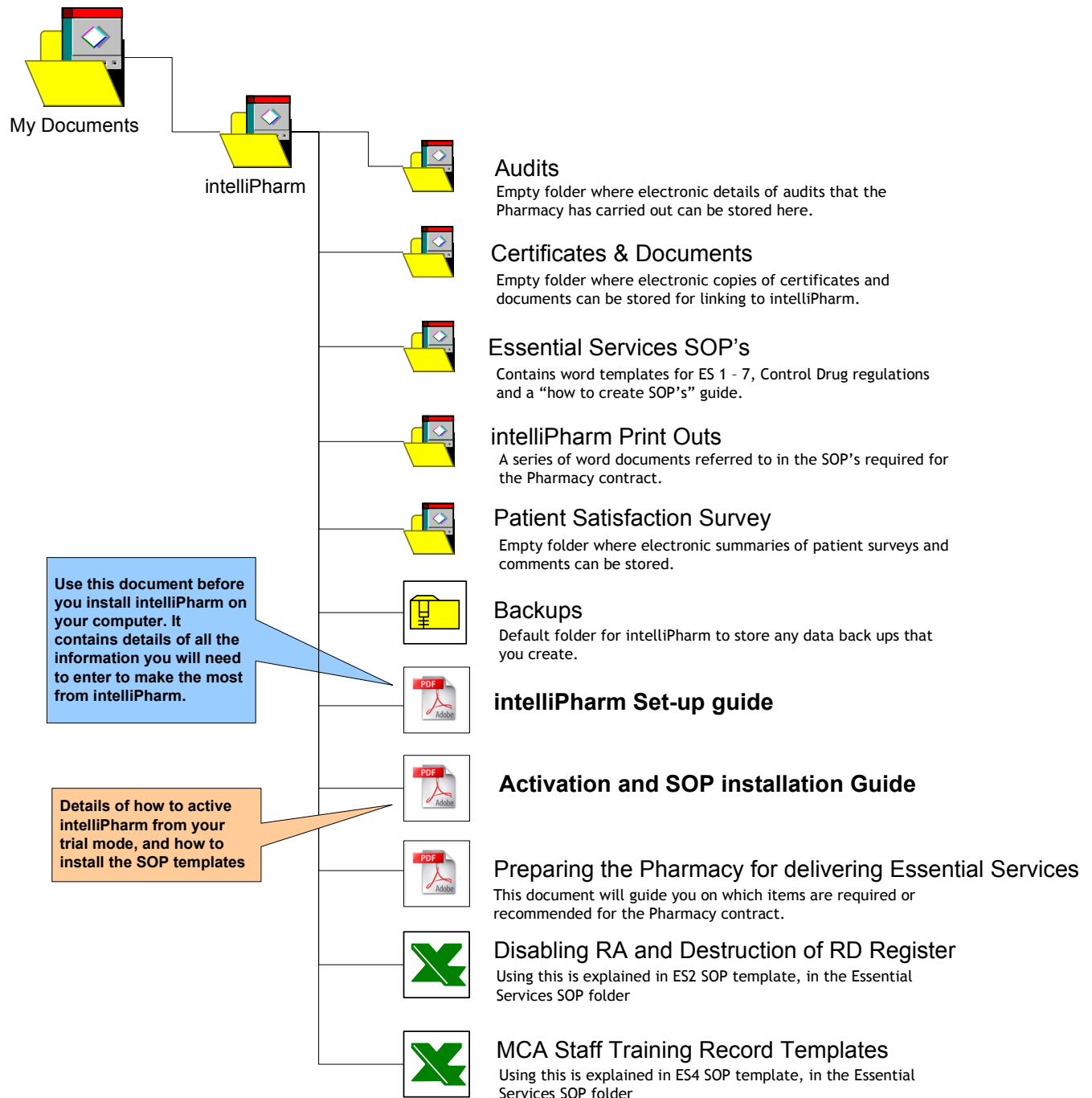
*On daily start up of the program system will prompt for the entry of the fridge temp and pharmacist on duty log, requirement of ES7.*

- **Fridge Temperature Log**  
Alerts will be generated when readings are out of range and a comments box for action taken. Provides a graphical view and an ability to view past entries.
- **Duty Log**  
If an employed pharmacist is on duty it automatically offers a list of pharmacist employed at the pharmacy. If a locum is present the program will require them to consent to data protection, patient confidentiality, human rights and follow SOP's of the pharmacy or their own. Once the locum is registered on the system it will not ask for repeated acceptances of agreements. The duty log data will feed into the dispensing the error log.
- **Auto Update**  
intelliPharm incorporates an auto-update feature that ensures that you will always have the current version.

Using IntelliPharm will facilitate a locum to comply with the pharmacy contract. It will also allow inspectors to easily view the required recording data and documents from a single source, even if you are not present.

## Files and Folders Map

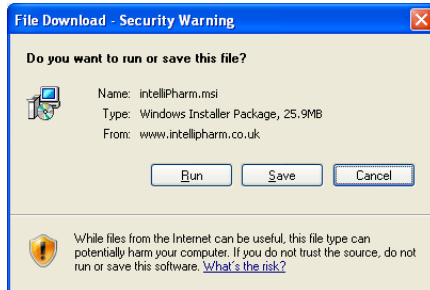
The diagram below shows how intelliPharm is organised on your computer with the names of the folders and files that are provided. You will see that everything is organised in your 'My Documents' folder in under the master 'intelliPharm' directory.



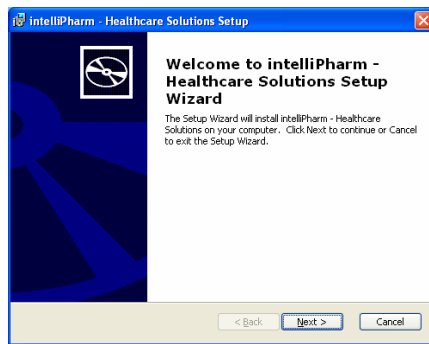
# intelliPharm installation Guide

## Installing IntelliPharm

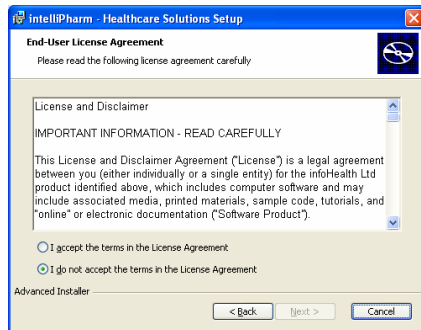
1. It is advised you close all open applications before beginning with the installation.
2. Download the installation file from the IntelliPharm website. To do this click on the IntelliPharm logo, you should then see the following screen.



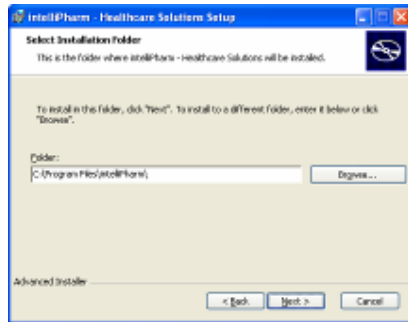
3. Click on **'Run'** this will now download the installation file, please be patient while it downloads. The download time will vary depending on the speed of your internet connection.
4. Once downloaded and the installer has automatically extracted all the proper files, you will see the **"Welcome to IntelliPharm - Healthcare Solutions Setup Wizard"** Screen. Click **"Next"** to proceed.



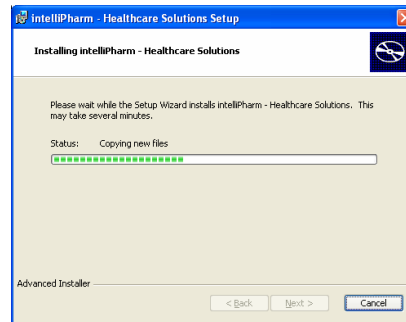
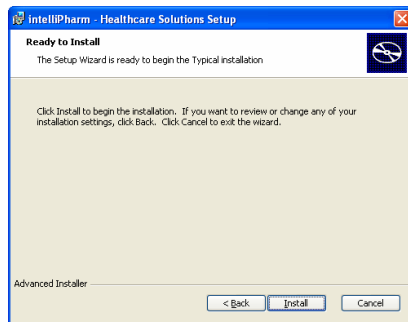
5. You must accept the terms of the license agreement to install IntelliPharm 1.0. If you accept all the terms, click on **"I accept the terms in the License Agreement"** and then click on **"Next"**. If you do not accept the terms then click on **"Cancel"**, this will end the installation process.



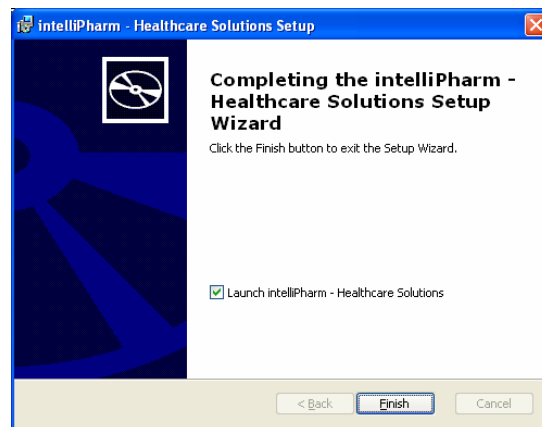
- You should now see the Select installation folder screen. It is strongly recommended that you install the software to the default location, click “**Next**” to proceed.



- The next screen to a confirmation screen before the installation will start. Click “**install**” to start the installation of IntelliPharm 1.0. The installer will now copy all the files that are needed for IntelliPharm.



- When IntelliPharm 1.0 has been successfully installed onto your computer the completed screen will appear. From here you have an option to launch IntelliPharm after you click “**Finish**”. To do this ensure the box next to “**Launch IntelliPharm - Healthcare Solutions**” is ticked.



- The installation is now complete.

# intelliPharm Set Up Guide

## Introduction

Welcome to intelliPharm set-up guide. intelliPharm has been designed to allow you to trial the full application for 14 days, so that you can get an idea of what it can do and how it helps deliver your pharmacy requirements for the Pharmacy contract.

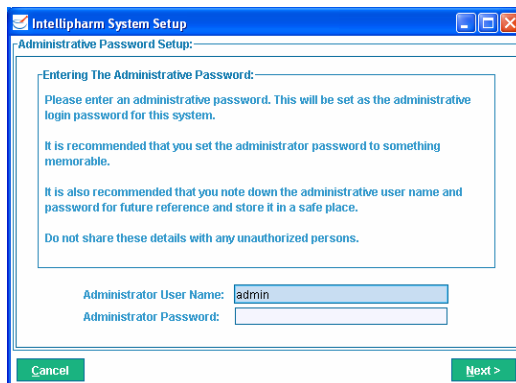
If initially you only wish to trial the product you only need to enter some basic information that will allow you to get an overview of intelliPharm. When you purchase intelliPharm you will need to enter all the set-up information, some of which you may need some time to gather from various sources. This is why we have produced this document to allow you to gather the information that is required.

## Starting intelliPharm

Once you have successfully installed intelliPharm, the set-up program gives you an option to launch intelliPharm when it is complete, or if you have chosen not to do this then you can start intelliPharm at anytime by double clicking on the “*intelliPharm*” logo on your desktop.



The first screen you will be presented with is the “*Administrative Password Setup*” as below.



It is important that you set a different administrator password to a password that you may choose to use on a day to day basis. Please ensure you keep this in a safe place for future reference.

Notes:

## Required information

The following details are required to be entered before you can start to use intelliPharm. To speed up the time taken to complete the install you can use the tables provided to collect the information needed before you start intelliPharm. We have also provided screens shot for each section so you will know what to expect when you are asked to enter the information.

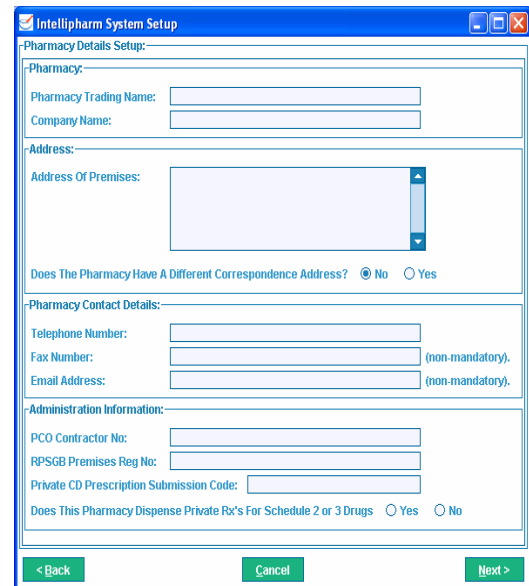
### Pharmacy Details Set-up

#### Pharmacy

Pharmacy Trading Name *	
Company Name *	
Premises Address *	
Tel *	
Fax	
E-Mail	

#### Administration information

1. PCO Contractor No *	
2. RPSGB Premises Reg No	
3. Private CD Submission Code	
4. Does your pharmacy dispense Private Rx's for Schedule 2 or 3 drugs *	Y / N



1. PCO Contractor No - This is your contractor number you use when you submit you prescriptions every month. You can get this from your PCT.
2. RPSGB Premises Reg No - You can get this from the Royal Pharmaceutical Society of Great Britain.
3. Private CD Submission Code - You get this from the Prescription Pricing Authority (PPA)

Items marked with “ \* ” are required before you can move onto the next screen

Notes:

## Pharmacy Opening Hours Setup

Use this screen to detail your pharmacy opening hours. This screen is important for a number reasons within IntelliPharm. This information will be used to identify when a pharmacist should be on duty and this will be reflected in the duty log. It also reflects your contracted hours with the PCT, differentiating your core contractual hours and your supplementary hours. You will find that IntelliPharm has an option for you to produce the PSNC HN1 for changing your opening hours.

IntelliPharm System Setup
\_ □ ×

Pharmacy Opening Hours Setup:

Please Adjust These Opening Hours To Match Your Pharmacy Opening Times:

Weekday	Open / Closed?	Total Opening Hours				
		Open		Close For Lunch?	Closed For Lunch	
		From	To		From	To
Monday	Open	09:00	19:00	No	No Lunch Closure	
Tuesday	Open	09:00	19:00	No	No Lunch Closure	
Wednesday	Open	09:00	19:00	No	No Lunch Closure	
Thursday	Open	09:00	19:00	No	No Lunch Closure	
Friday	Open	09:00	19:00	No	No Lunch Closure	
Saturday	Open	09:00	17:30	No	No Lunch Closure	
Sunday	Closed	Closed				

Weekday	Core Hours Apply?	Core Contractual Hours				
		Open		Close For Lunch?	Closed For Lunch	
		From	To		From	To
Monday	Yes	09:00	17:00	No	No Lunch Closure	
Tuesday	Yes	09:00	17:00	No	No Lunch Closure	
Wednesday	Yes	09:00	17:00	No	No Lunch Closure	
Thursday	Yes	09:00	17:00	No	No Lunch Closure	
Friday	Yes	09:00	17:00	No	No Lunch Closure	
Saturday	No	Non-Applicable				
Sunday		Closed				

Total Weekly Hours:	58 Hours 30 Mins
Total Core Contractual Hours:	40 Hours 00 Mins
Total Supplementary Hours:	18 Hours 30 Mins

< Back
Cancel
Next >

Click on “Next” when you have completed this form.

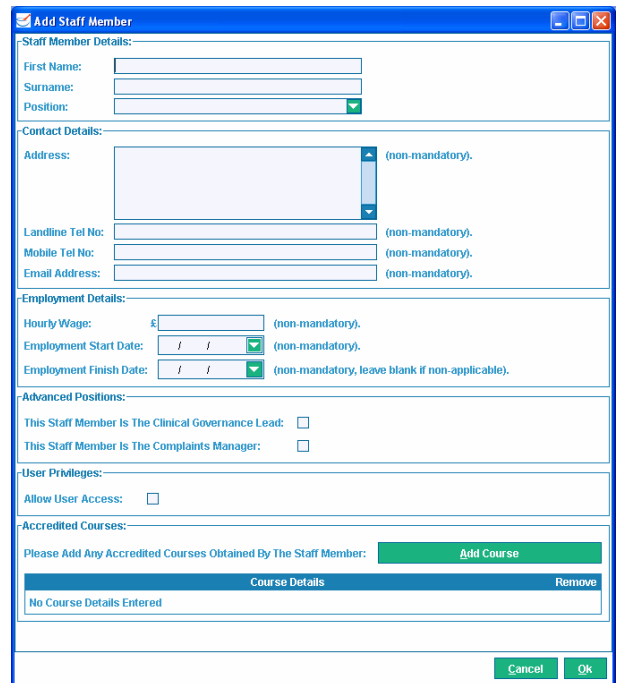
Notes:

## Staff Details Set-up

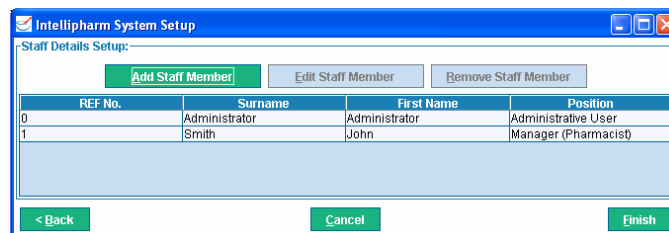
The section is for you to setup your staff that work in the pharmacy. It is important to ensure that you enter at least member of staff, so that you can log on using these details. The first member of staff that you should create is the Manager or Pharmacist.

Click on “Add Staff Member”

Staff Details		* = required details
First Name *		
Surname *		
Position *		
Address		
Landline telephone no		
Mobile no		
e-mail address		
Hourly wage	£	
Employment start date		
Employment finish date		
Clinical governance lead		
Complaints manager		
User Privileges	If ticked it will ask for username and password for log on, and the user type whether standard user or administrator.	
Accredited Courses	You can add any accredited courses each staff has obtained, and you can store any electronic copies here as well.	



Once you have entered the staff this completes the required information and click “Finish”.



REF No.	Surname	First Name	Position
0	Administrator	Administrator	Administrative User
1	Smith	John	Manager (Pharmacist)

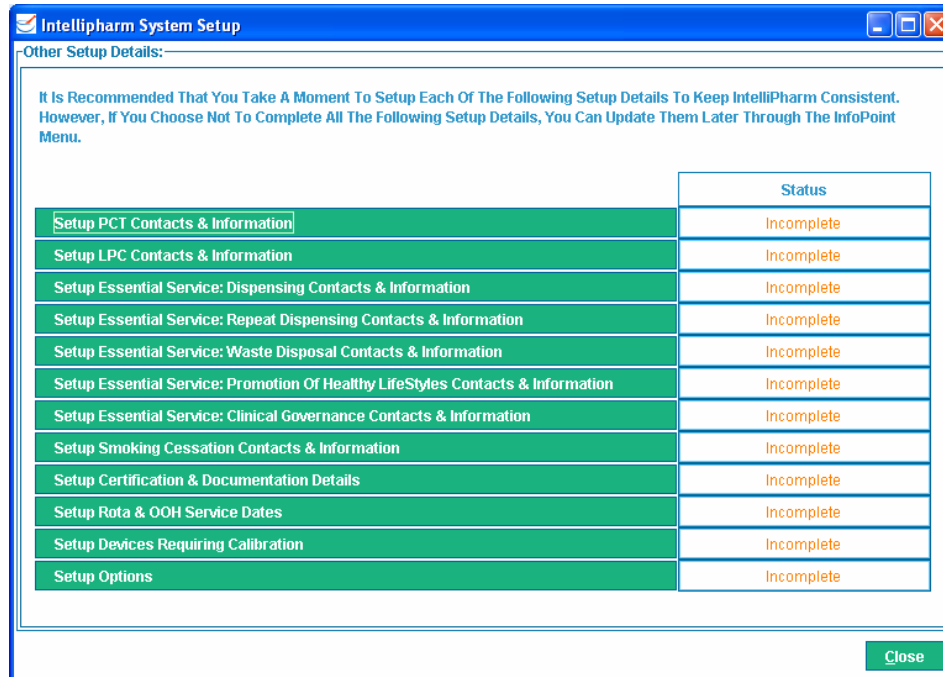
Notes:

## Other Setup details screen

You will now be presented with the other setup details screen. These details are not mandatory however they will affect certain parts of intelliPharm.

We advise that you spend some time to complete the details so that you are able to make the most from intelliPharm, and to ensure your compliance to the Pharmacy contract requirement.

Once you have collected the information you can click on any of the sections to complete the details.

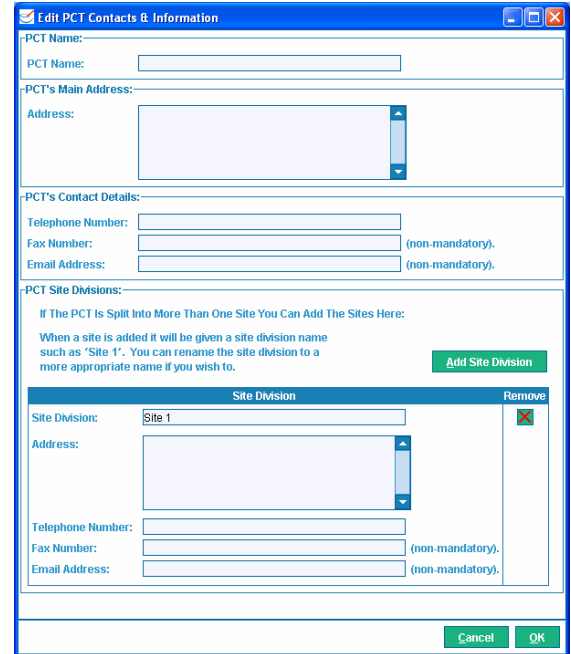


Notes:

## PCT Contact Details

### PCT Details

PCT Name	
Address of Main Site	
Telephone	
Fax Number	
E-mail address	
<b>Other Site Details*</b>	
Site Division	
Address	
Telephone	
Fax	
E-mail	



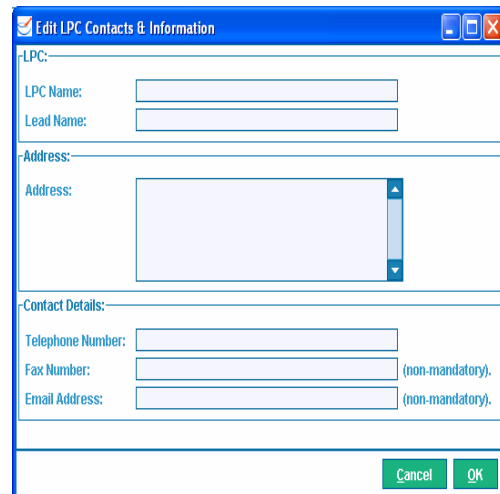
\* If your PCT has many divisions located at different addresses, you can enter them here. This will provide you with a central point for all your PCT contacts and their site addresses.

Notes:

## LPC Contact Details

### LPC Details

Name	
Lead Name	
Address	
Telephone number	
Fax number	
e-mail address	



Notes:

## Dispensing Essential Services Contact Details

### Pharmacy Contracts Manager

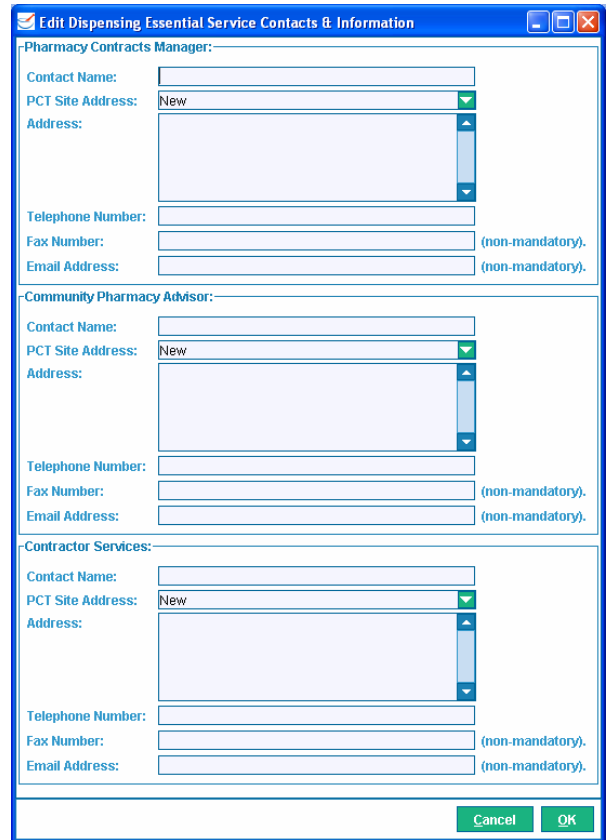
Name	
PCT Site Address	Select PCT site address from drop down.
Tel	
Fax	
E-mail	

### Community Pharmacy Advisor

Name	
PCT Site Address	Select PCT site address from drop down.
Tel	
Fax	
E-mail	

### Contractor Services

Name	
PCT Site Address	Select PCT site address from drop down.
Tel	
Fax	
E-mail	



The PCT site address is from the details you create in the PCT details sections before, and if you have created more than one site then all the site addresses will appear in the drop down.

Notes:

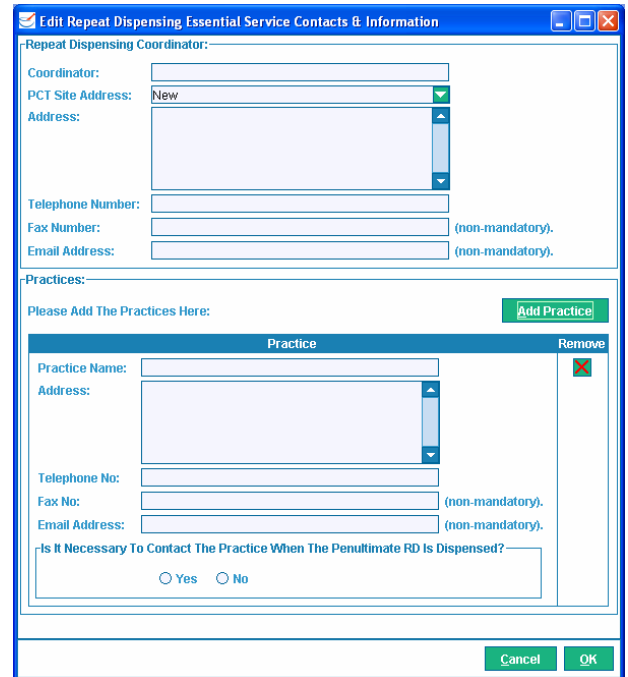
## Repeat Dispensing Essential Service Contact Details

### PCT Repeat Dispensing Coordinator

Coordinator	
PCT Site address	
Tel	
Fax	
E-mail	

### Specific Practices

Practice Name	
Address	
Tel No	
Fax No	
E-Mail Address	
Is it necessary to contact practice when penultimate RD is dispensed?	Y/N



Use the specific practice details to keep records of key surgeries you have close working relationship on Repeat Dispensing as detail in the **“Practice Pharmacy Meeting”** document provided with the SOP’s.

Notes:

## Waste Disposal Essential Service Contact Details

### ***DOOP Collector***

Name	
Address	
Tel No	
Fax No	
E-Mail	

### ***PCT DOOP Coordinator***

Name	
Address	
Tel No	
Fax No	
E-Mail	

**Edit Waste Disposal Essential Service Contacts & Information**

**-DOOP Collector:-**

Name:

Address:

Telephone Number:

Fax Number:  (non-mandatory).

Email Address:  (non-mandatory).

---

**-PCT DOOP Coordinator:-**

Contact Name:

PCT Site Address:

Address:

Telephone Number:

Fax Number:  (non-mandatory).

Email Address:  (non-mandatory).

Notes:

## Promotion of Healthy Lifestyles Essential Service Contacts and information

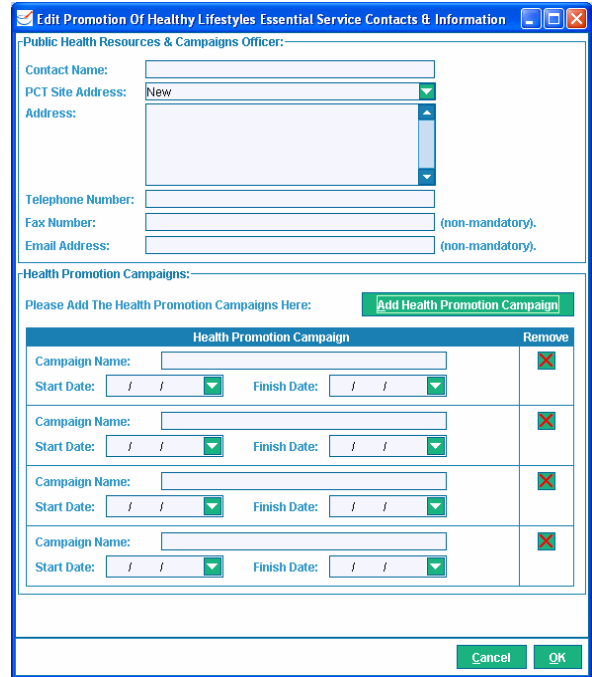
Use this section to detail contacts in the PCT for Health promotion and to enter dates for the PCT campaigns throughout the year, intelliPharm will then notify you when a campaign is due to start and finish.

### PCT Public Health Resources Campaign Officer

Contact Name	
PCT Site Address	Select from drop down list
Address	
Tel No	
Fax No	
E-Mail	

### Health Promotion Campaigns

Campaign Name	Start date	Finish Date

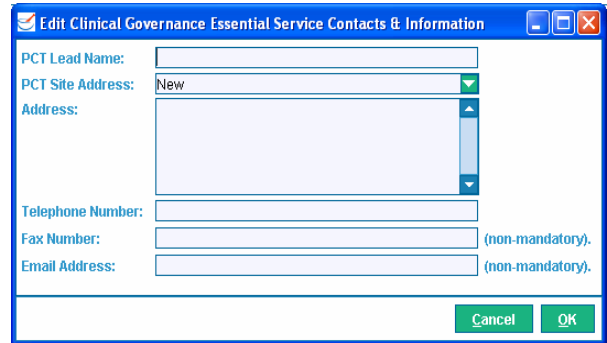


Notes:

## Clinical Governance Essential Service Contact Details

### ***PCT Clinical Governance contact details***

Name	
PCT Site Address	Select from the drop down menu
Address	
Tel No	
Fax	
E-Mail	



The screenshot shows a dialog box titled "Edit Clinical Governance Essential Service Contacts & Information". It contains the following fields:
 

- PCT Lead Name: [Text Input]
- PCT Site Address: [Dropdown Menu] (Current selection: New)
- Address: [Text Area]
- Telephone Number: [Text Input]
- Fax Number: [Text Input] (non-mandatory).
- Email Address: [Text Input] (non-mandatory).

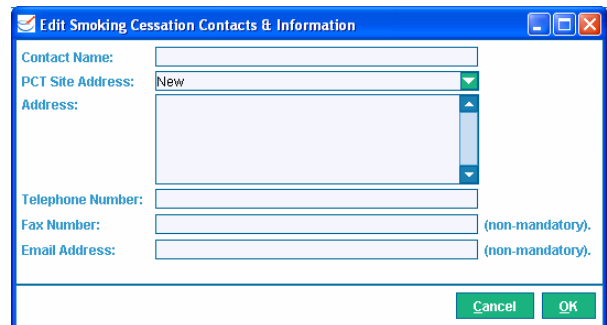
 At the bottom right, there are "Cancel" and "OK" buttons.

Notes:

## Smoking Cessation

### ***Smoking Cessation Contact Details***

Contact Name	
PCT Site Address	Select from the drop down menu
Address	
Tel No	
Fax	
E-Mail	



The screenshot shows a dialog box titled "Edit Smoking Cessation Contacts & Information". It contains the following fields:
 

- Contact Name: [Text Input]
- PCT Site Address: [Dropdown Menu] (Current selection: New)
- Address: [Text Area]
- Telephone Number: [Text Input]
- Fax Number: [Text Input] (non-mandatory).
- Email Address: [Text Input] (non-mandatory).

 At the bottom right, there are "Cancel" and "OK" buttons.

Notes:

## Certification & Documentation

Where certificates and documents are required with intelliPharm, you have the option to access any electronic copies by telling intelliPharm where they are on your computer; otherwise you will need to ensure that you record where they are kept.

If you want to have electronic copies, what we suggest is that you have the documents scanned and these can be copied into a specific folder on your computer, once you have installed the SOP's a folder called "Certificates and Documents" within your intelliPharm folder will be created. Then all you need to do is to link the electronic copy with intelliPharm as below.

### Data Protection

controller name	
registration number	
security number	
expiry date	

### Freedom of information

Freedom of information document	Yes / No
---------------------------------	----------

### Waste Exemption Certification & Hazardous Waste Certification

waste exemption certificate	Electronic link option
waste carrier licence details if you accept returned meds via delivery driver	Electronic link option
hazardous waste producer licence if you produce more than 200kg of hazardous waste	Electronic link option

### Other Certificates & Documents

Click add document to store further copies of certificates and documents	Electronic link option
--	------------------------



**Certification & Documentation**

**Data Protection:**

Data Controller Name:

Reg No:

Security No:

Expiry Date:  /  /   Notify On Expiry:

**Freedom Of Information:**

Do You Wish To Store The Freedom Of Information Document For This Pharmacy Electronically?  Yes  No

**Waste Exemption Certification & Hazardous Waste Certification:**

**Waste Exemption Certificate Details:**

Do You Have A Waste Exemption Certificate?  Yes  No

**Waste Carrier Licence Details:**

Do You Accept Returns Via A Delivery Driver?  Yes  No

**Hazardous Waste Producer Licence Details:**

**-Notes:-**

If Your Pharmacy Produces More Than 200kg Of Hazardous Waste A Year, You Need To Make An Application To The Local Environmental Agency To Be Registered As A Hazardous Waste Producer. You Will Be Issued With A Certificate To Be Renewed Annually.

Does Your Pharmacy Need To Have A Hazardous Waste Producer Licence?  Yes  No

**Other Certificates & Documents:**

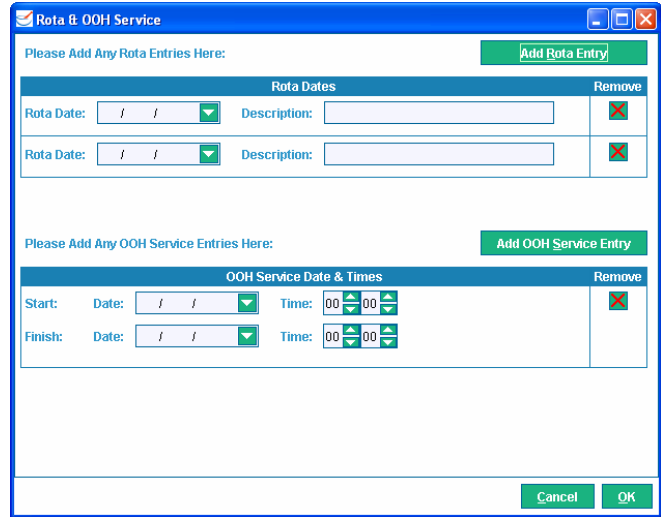
You Can Add Any Other Certificates Or Documents That You Wish To Reference Here:

Document	Remove
No Documents Entered	

## Rota & Out of Hours Service

Enter any rota dates or Out of Hour's services that you may do:

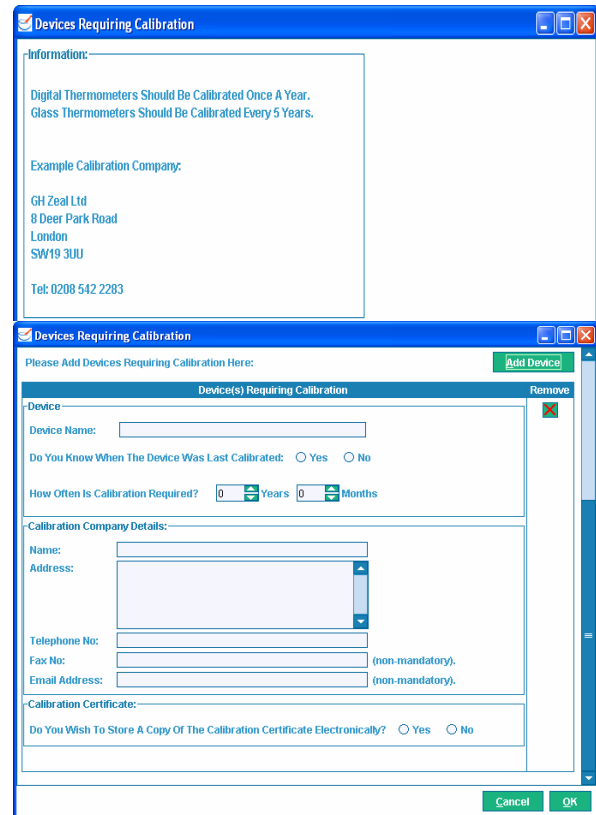
- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.



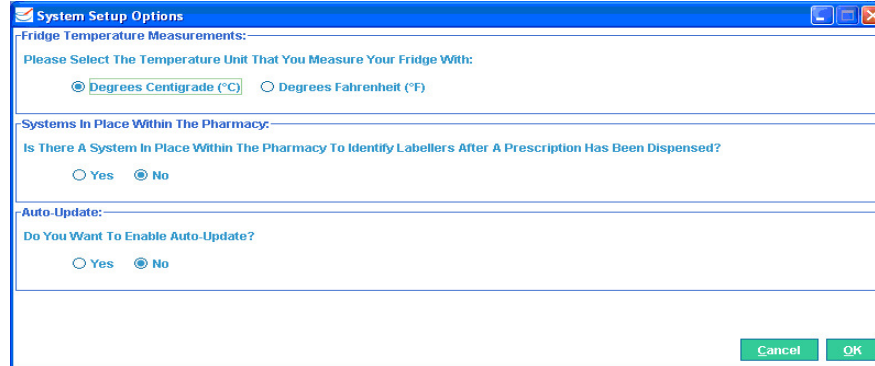
## Devices Requiring Calibration

<b>Device Details</b>	
Device Name	
Do you know when the device last calibrated	Y / N
How often is calibration required?	
<b>Company Details</b>	
Name	
Address	
Telephone No	
Fax No	
E-mail Address	
Calibration Certificate stored electronically	Y / N

Notes:



## System Setup Options

A screenshot of a Windows-style dialog box titled "System Setup Options". The dialog has a blue title bar with standard window controls. It contains three sections: 1. "Fridge Temperature Measurements:" with the instruction "Please Select The Temperature Unit That You Measure Your Fridge With:" and two radio buttons: "Degrees Centigrade (°C)" (selected) and "Degrees Fahrenheit (°F)". 2. "Systems in Place Within The Pharmacy:" with the question "Is There A System In Place Within The Pharmacy To Identify Labelers After A Prescription Has Been Dispensed?" and two radio buttons: "Yes" and "No" (selected). 3. "Auto-Update:" with the question "Do You Want To Enable Auto-Update?" and two radio buttons: "Yes" and "No" (selected). At the bottom right, there are "Cancel" and "OK" buttons.

The Auto Update option is by default set to 'No', if you save the option as 'Yes' then every time you start IntelliPharm it will connect to the web server and check for any new program updates. If there are any updates available the system will ask you if you wish to download and install them.

# Activation and SOP installation Guide

## Introduction

When you first install intelliPharm you are able to trial the program for up to 14 days. You will be reminded how many days you have left on your trial every time you start intelliPharm. During the trial period you will not be able to access the other document templates that intelliPharm provides. These include detailed Standard Operating Procedures for you pharmacy incorporating intelliPharm. Please see page 2 for details of how to install the SOP's and other documents that are provided with the full version of intelliPharm.



You will be provided with a registration code once you have returned your contract and have paid the license fee to infoHealth. Normally infoHealth will call you as soon as they have received your contract and the payment and they will talk you through the activation process.

For completeness we have described the process so you can refer to this when you activate the program.

## Activation

When you click on the "Register Now" button, you will be asked to confirm your Pharmacy details again. This is just to ensure that while you might have been trialling intelliPharm you may not have completed all the details. Once the program is activated you will not be able to change these details, so please ensure that you enter the correct details before you proceed.



The next screen will ask you to call infoHealth with your product code and they in turn will provide you with your own unique activation key.



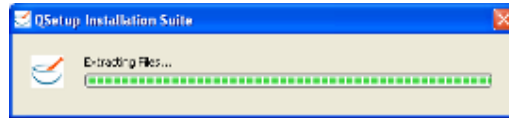
Enter the Activation Code and click on "Finish". If the activation code is entered correct you will have successfully activated intelliPharm, when to click "OK" you SOP's will now be installed.



## SOP installation

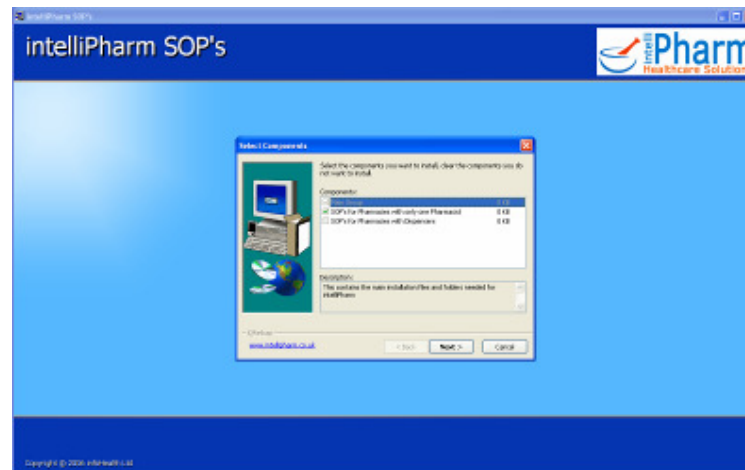
The trial version of intelliPharm will not provide you with access to the range of documents and SOP's that intelliPharm provide.

Once you have registered intelliPharm the installation for the SOP's and documents will automatically start the self install program. Please be patient while the files are being copied.

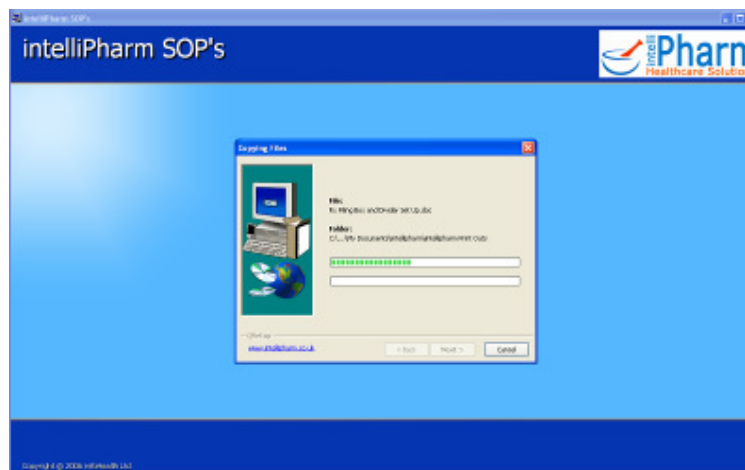


The next screen you will be presented with is for you to select the version of SOP's that are appropriate for your pharmacy. You have choice from two types of SOP's you can install.

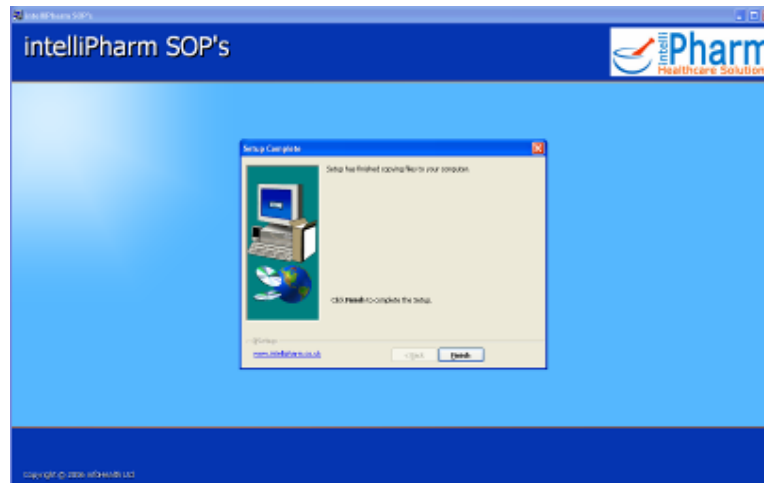
1. SOP's for Pharmacies that only have a single pharmacist in the dispensary or,
2. SOP's for Pharmacies that have other dispensary staff with the pharmacist, for example dispensers, pre-registration students etc.



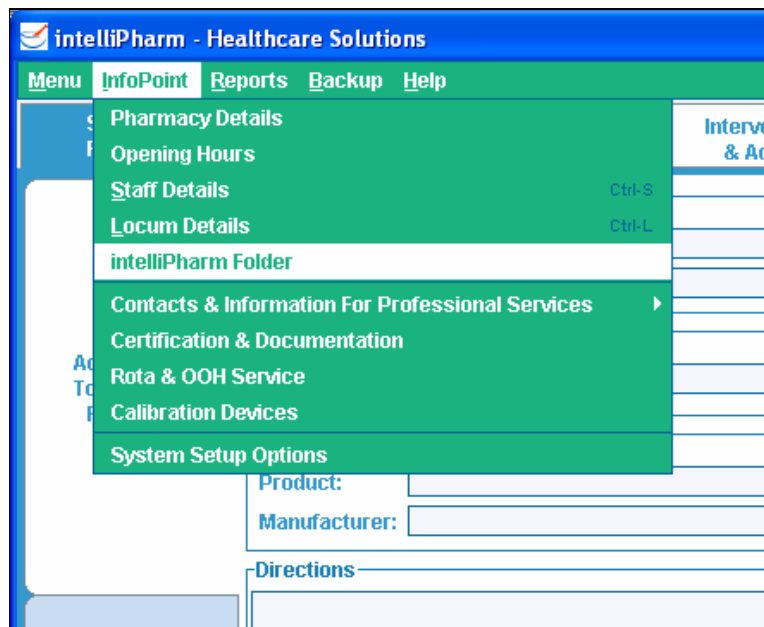
Once you have selected the correct option click “Next” to install all the files needed.



Once complete you will be presented with the final screen to confirm the installation has been successful, when you click “Finish” you will be taken back to intelliPharm.



With in intelliPharm you will now find that the menu item under “*infoPoint*” will have changed to “*intelliPharm Folder*”.



**When you click on “intelliPharm Folder” this will open your windows explorer in the intelliPharm folder. Details of what is provided with intelliPharm SOP templates and how the folder is organised see the Files and Folders Map section below.**