## **CHARMS - Product Data Entry**

## Edmonton Conference Workshop April 23 & 24 2004

- Data Entry Clerks -

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## **Tools for Data Entry**

### Flow Chart for Data Entry for Product Utilization

### 1) Canadian Blood Services (CBS)

- Packing Slips faxed daily - products issued from CBS

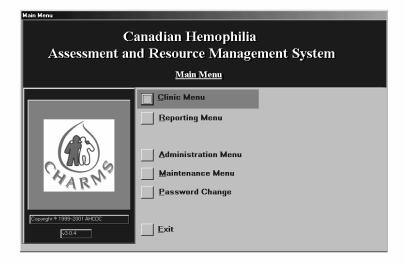
### 2) Facility Blood Banks

- Tracking Logs, sent in by regional facilities - *Products issued to patients* for Home Care treatment or infusion within the facility

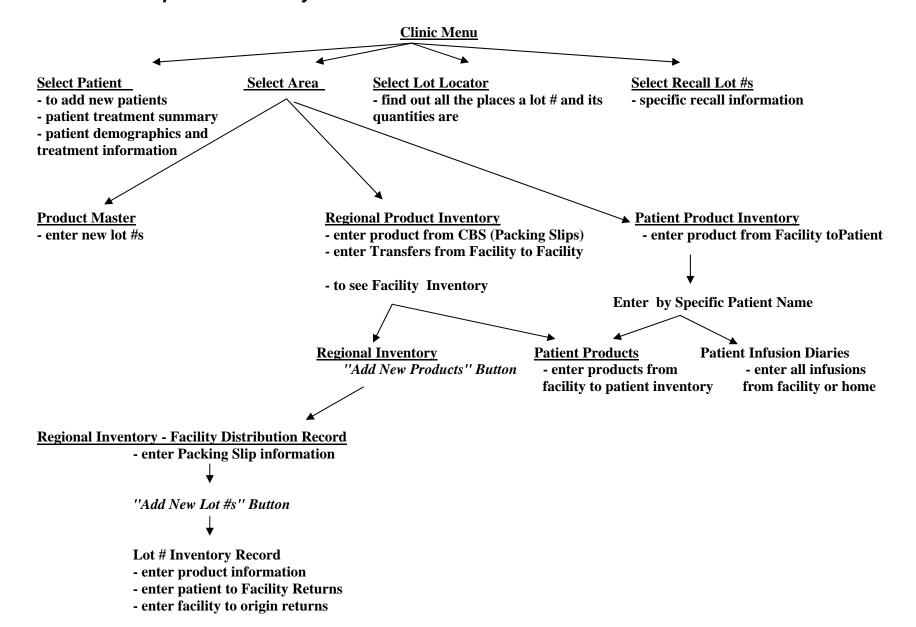
### 3) Patients on Home Care treatment

- Patient Home Diaries faxed or sent in periodically depending on patient's treatment protocol - *patient's infusions outside of the facility* 

The following "Main Menu" screen is the starting screen in CHARMS. For data entry for Packing Slips, Facility Tracking Logs and Patient Infusion Diaries, start by entering the "Clinic Menu".



#### CHARMS "Road Map" for Data Entry



### General Functions for Data Entry

The following picture shows a group of function buttons that appear in most of the screens where data entry is required in CHARMS.



**Note**: This function is used to attach additional information to an entry.

**Edit**: When a screen is complete and saved (via the "Exit" button), the information in the screen cannot be changed unless this button has been changed from a pencil (as above) to an edit symbol (curved arrow).



**Add**: This button will create a blank page of the current page open, while saving the current page with entered information.

**Delete**: This button will delete the current page and all information entered into it.

**Exi**t: Will exit the screen and save the information entered in the current page.

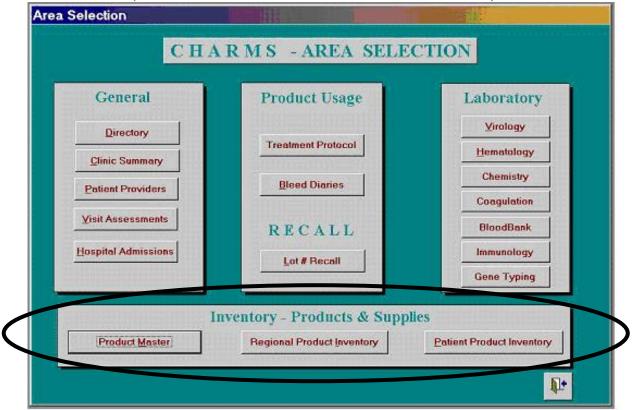
### Special Functions for Data Entry

1) Press the "Esc" key twice to exit from a screen that the data entry has been started in error (this includes some screens that if they have been opened in error, "Esc" must be pushed twice in order to leave the blank page). This will remove any information that has been entered and then you can exit. If the "Exit" button has been used on this screen previously, the "Esc" function will not work because the data has already been saved to the database, in which case the record must be deleted using the "Delete" button and re-entered.

2) A more specific record may be viewed (and occasionally modified), where this "Magnifying Glass" button is available. To view specific information, highlight the record, and select this button.

### **Data Entry of Products**

There are 3 main sections of Product Data Entry in the CHARMS system, all of which can be accessed from the following screen *Area Selection* screen (From the main menu *Clinic Menu - Select Area*):



- 1. Product Master for entering new lot numbers;
- 2. Regional Product Inventory for entering products from the CBS to the Facility;
- 3. Patient Product Inventory for entering issues from the Facility to the patient for infusion in the hospital or for Homecare or Patient Inventory.

### 1. ENTERING (NEW) LOT NUMBERS

The CHARMS software program will come with the currently used Brands and Products already in the system (e.g. Baxter Recombinate). To enter a new lot number, the lot # must be entered into the Product Master.

#### Path:

Clinic Menu > Select Area > Product Master > enter manufacturer name > "Lot #'s" tab > "Add New Lots" button > Regional Lot #'s Master

#### **Instructions:**

- 1. From the Select Area screen, select the Product Master Button.
- 2. In the *Product Master* screen, using the picklist select the corresponding manufacturer (eg. Bayer).
- 3. Select the *Lot* #'s tab.
- 4. Select the *Add New Lot#'s* button, this will take you to the screen shown below.
- 5. Insert the new lot number in the *LOT* #: field. (double check for accuracy)
- 6. Select the Product and Brand Name from the picklist in the *Select Product* field. Upon entering this, several fields will be filled in for you automatically.
- 7. Check that the *Measure* field is reading the appropriate measure, ie. Niastase should be listed in terms of micro grams (mcg). Most other products such as Kogenate FS and Recombinate are listed in 'vials'.
- 8. Enter the units per vial in *Unit/Measure*. For Niastase, enter the number of mcg as in # 7.
- 9. Enter the expiry date of the lot number in the *Expiry Date* field.



# 2. ENTERING ISSUES FROM CANADIAN BLOOD SERVICES (CBS) TO FACILITIES (see back of booklet for examples of packing slips)

### CBS Packing Slips:

The Packing Slip is the starting point for a product moving through the CHARMS system. The CBS will send a Packing Slip for each product that was issued to a facility.

#### Path:

Clinic Menu > Select Area > Regional Product Inventory > Add New Products > Add More Lot #'s > Regional Inventory - Facility Distribution Record

#### Screen 1: Regional Product Inventory Screen

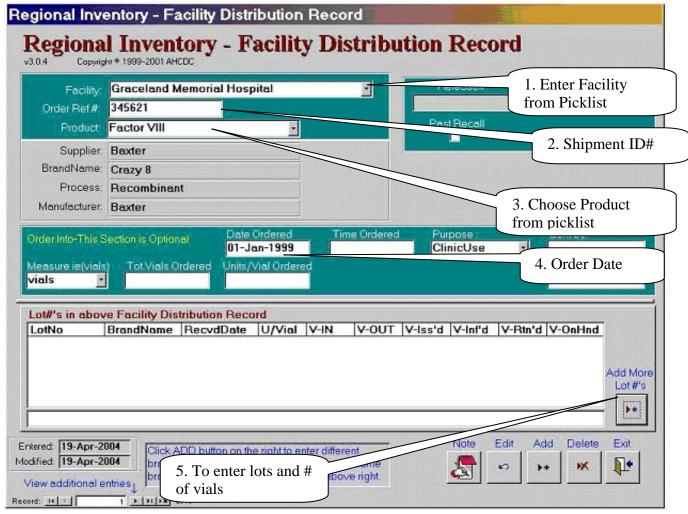
#### **Instructions:**

- 1. From Select Area, select Regional Product Inventory.
- 2. To add a new Packing Slip select the *Add New Products* button.

(For transfers from Facility to Facility the *Transfer Product - Facility to Facility* button can also be used at this point.)



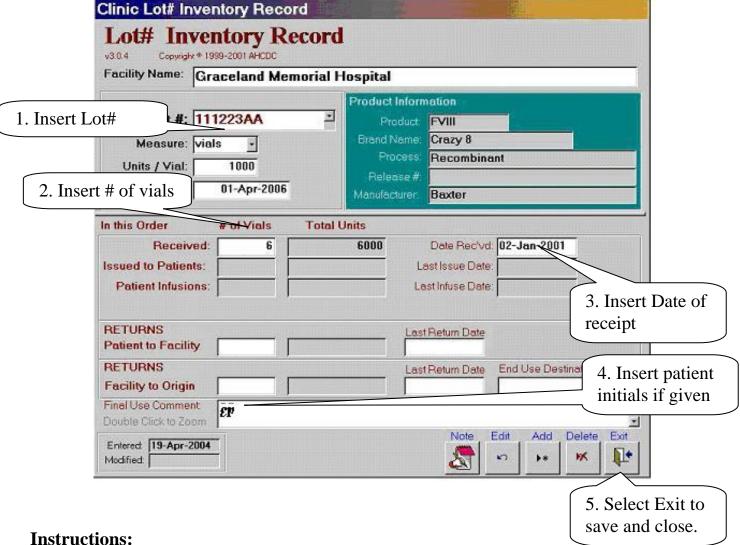
Screen 2: Regional Inventory Distribution Record



- 1. Enter Facility name (must be from picklist)
- 2. Enter shipment ID from Packing Slip (this number MUST BE accurate).
- 3. Choose Product (must be from picklist)
- 4. Enter order date from Packing Slip.
- 5. Select button for "Add More Lot #s.

If there is more then one issue listed on a Packing Slip (ie 9 vials of Benefix Lot# 122093 and 4 vials of Benefix Lot# 133478), see the instructions on the next page for 'More then one Issue on PS'.

Screen 3: Regional Inventory Distribution Record. Lot Inventory Record



- 1. Choose from picklist or insert Lot # (must be in picklist). If the lot is NOT in the picklist either the lot # is new (see Entering New Lot #s) or the wrong product has been chosen on the previous screen. Hit "Esc" on keyboard twice and Exit the page.
- 2. Insert # of vials as listed on Packing Slip.
- 3. Insert Date of receipt (not order date), from Packing Slip. This is the date the Product is shipped from the CBS to the Facility.
- 4. If the patient initials are given on the Packing Slip, enter them here.
- 5. When screen is complete hit Exit, to save and close.

#### More then one Issue of Product on one Packing Slip:

- a) *Same product*: If there is more then one issue listed on a Packing Slip (ie 9 vials of Benefix Lot# 122093 and 4 vials of Benefix Lot# 133478), after the Exit button has been pressed on the *Lot# Inventory Record*, CHARMS will return to the *Regional Inventory Distribution Record*. Select the "Add More Lot#s" button to enter another *Lot# Inventory Record*. This can only be done for issues of the same product, such as two issues of Benefix each with different lot#s.
- b) Different products: If there are two or more different products on one Packing Slip, ie. two issues of Niastase and one issue of Recombinate, the Niastase should be entered as in the instructions for "Same Product"; for the Recombinate, exit out of the Lot# Inventory Record then exit out of the Regional Inventory Distribution Record and select the "Add New Products" button on the Regional Product Inventory Screen, to begin a new Regional Inventory Distribution Record. Continue entering the new product as in the instructions above.

### 3. ENTERING ISSUES FROM FACILITIES TO PATIENTS

The facility will issue products to the patient supply of Product to be used outside the hospital, ie. Homecare (A) or for an infusion in the hospital (B).

The facility needs a mechanism to inform the clinic of issues from the facility. An example of this is the a Facility Tracking Log. (see the back of this booklet for an example)

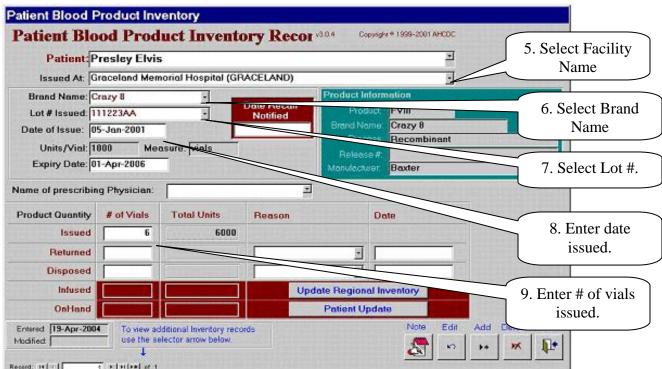
### A) FACILITY TO PATIENT FOR HOMECARE /PT INVENTORY

#### Path:

Clinic Menu > Select Area > Patient Product Inventory > enter patient name > Patient Products > Add New Products > Patient Blood Products Inventory Record

#### **Instructions:**

- 1. From the *Clinic Menu* select *Select Area*, and select the *Patient Product Inventory* button, which will bring you to the *Patient Inventory Product & Supplies* screen.
- 2. Enter the patient's name, last name first, in the *Select Patient Name* field.
- 3. Select the *Patient Products* tab.
- 4. Select the *Add New Products* button, which will bring you to the screen shown below.
- 5. Select the Facility name from the picklist in the *Issued At* field.
- 6. Select the Brand Name in the Brand Name field.
- 7. Select the Lot # in the Lot # Issued field.
- 8. Enter the date the product was issued to the patient in the *Date of Issue* field.
- 9. Enter the number of vials issued in the *Issued* field.
- 10. Select the *Exit* button to save and close.



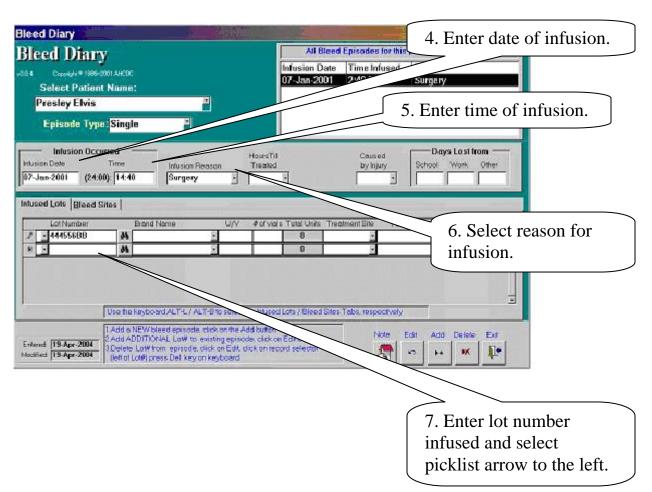
#### B) FACILITY TO PATIENT FOR INFUSION WITHIN FACILITY

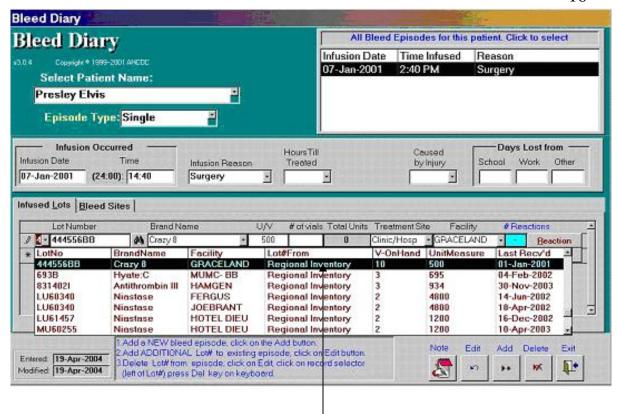
#### Path:

Clinic Menu> Select Menu> Patient Product Inventory> enter patient name> "Patient Bleed Diary" tab> "Add New Bleed" button> Bleed Diary

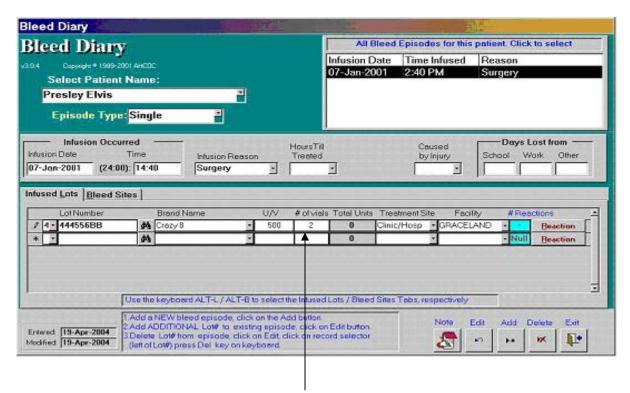
#### **Instructions:**

- 1. From the *Clinic Menu*, select *Select Menu*, and select the *Patient Product Inventory* button.
- 2. Enter the patient's name, Last name first, in the *Select Patient Name* field.
- 3. Select the *Add New Bleed* button, which will take you to the *Bleed Diary* screen below.
- 4. Enter the date of infusion in the *Infusion Date* field.
- 5. Enter the time, if given in the *Time* field.
- 6. Enter the reason for infusion in the *Infusion Reason* field (select from picklist).
- 7. Enter the lot # in the *Lot Number* field and select the picklist button to the left of the field.





8. Ensure the Lot#From field indicates **Regional Inventory** and the correct facility is selected. (Use Patient Inventory when entering Patient Infusion Diaries).



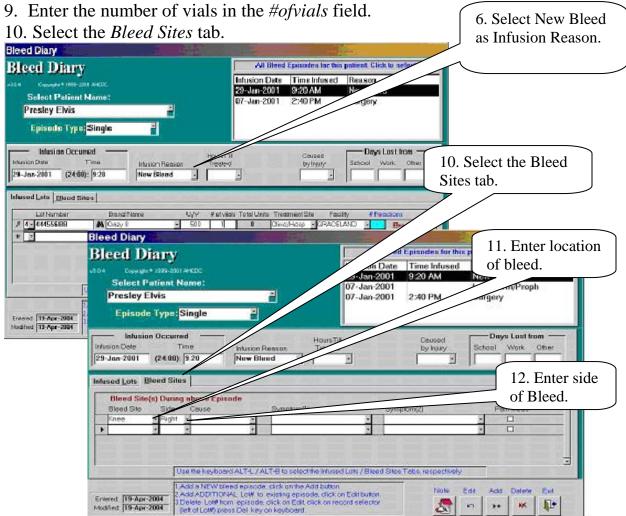
9. Enter the number of vials in the #of vials field.

- 10. For an infusion for Surgery, as in this case it is helpful to include a note that gives any available detail of the surgery (eg. liver biopsy) if known.
- 11. Select *Exit* to save and close record.

When entering an infusion for a <u>New Bleed</u>, there is one additional step in entering the infusion.

Steps 1-5 the same as in the above instructions.

- 6. Enter the reason for infusion as New Bleed, in the *Infusion Reason* field.
- 7. Select the lot # in the *Lot Number* field (same as above).
- 8. Ensure 'Regional Inventory' and the correct Facility is selected.



- 11. Enter the location of the bleed in the *Bleed Site* field.
- 12. Enter the side of the body, of the bleed in the *Side* field if applicable.
- 13. Select the *Exit* button to save and close.

#### 4. ENTERING A PATIENT'S INFUSION DIARY

Patients can inform their providers about their infusions of product in the form of an Infusion Diary. There is an example of a patient's infusion diary for the month of January 2001 at the back of this booklet.

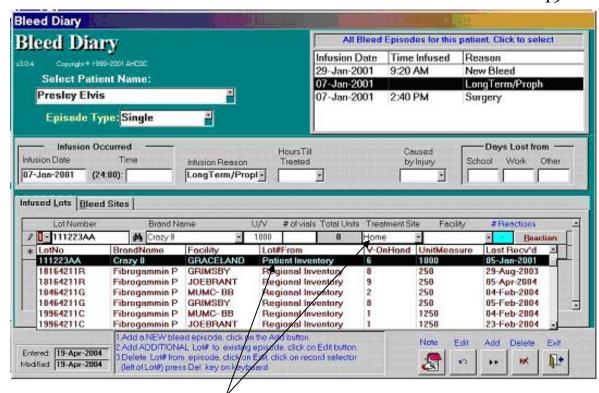
#### Path:

Clinic Menu> Select Menu> Patient Product Inventory> enter patient name> "Bleed Diaries" tab> "Add New Bleed" button> Bleed Diary

NOTE: the procedure of entering the infusion from the patient's Infusion Diary as opposed to the infusion from the Facility Tracking Log is almost identical except for selecting "Patient Inventory" when entering a lot # infused outside the hospital, instead of "Regional Inventory" when entering a lot# infused at a Facility.

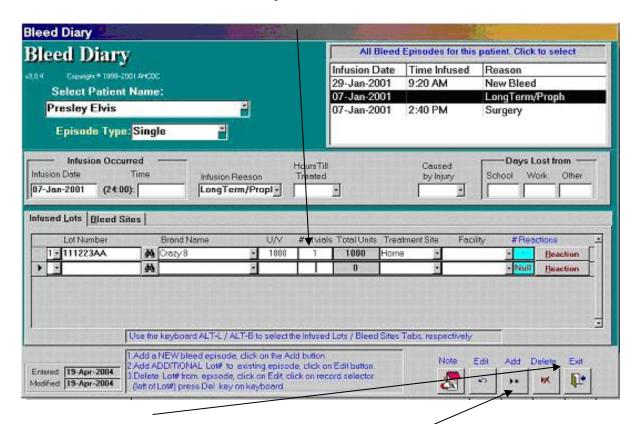
#### **Instructions:**

- 1. From the *Clinic Menu*, select *Select Menu*, and select the *Patient Product Inventory* button.
- 2. Enter the patient's name, Last name first, in the *Select Patient Name* field.
- 3. Select the *Add New Bleed* button, which will take you to the *Bleed Diary* screen below.
- 4. Enter the date of infusion in the *Infusion Date* field.
- 5. Enter the time, if given in the *Time* field.
- 6. Enter the reason for infusion in the *Infusion Reason* field (select from picklist).
- 7. Enter the lot # in the *Lot Number* field and select the picklist button to the left of the field.
- 8. Ensure that 'Patient Inventory' is selected.



(Note that *Treatment site* reads *Home* when issued from patient's home inventory.)

9. Enter number of vials in the #of vials field.



10. Select the *Exit* button to save and close OR the *Add* button save and enter another infusion.

## **Copies of Examples for Data Entry:**

1) Packing Slips (CBS to Facility)

Ship To: GRACELAND MEMORIAL

### Packing Slip Example 1

Shipment date: 31-JAN-01

#### Canadian Blood Services LOVEMETENDER, CANADIAN BLOOD SERVICES PACKING SLIP

Bill To: PROVINCE OF ONTARIO

Shipment ID: 0000345621 CANADIAN BLOOD SERVICES 1 MAIN ST Prepaid/Collect: LOVEMETENDER, ON FRACTIONATION Ship Via: L8N 3Z5 Req. Delivery Date: Order Date: 02-JAN-01 Patient Quantity Initials Product Description Issued Product Description Requested Qty Backordered For the Attention of UPV Lot # Issued Qty Requested RECOMBINATE FACTOR VIII FS 11810 IU EP CRAZY 8 1000 111223AA 6 V Total # of Pieces: Misc. # of Pieces: Shipper: Verifier: \_\_\_\_\_ Total Weight: Misc. Weight: Acknowledgment: \_ Signature Date

IT IS A GOVERNMENT REQUIREMENT THAT A SIGNED COPY OF THIS VOUCHER INDICATING RECEIPT OF PRODUCTS BE RETURNED AS SOON AS POSSIBLE PLEASE SIGN AND RETURN TO THE CANADIAN BLOOD SERVICES

Ship To: GRACELAND MEMORIAL

### Packing Slip Example

Shipment date: 01-JAN-01

#### Canadian Blood Services LOVEMETENDER, CANADIAN BLOOD SERVICES PACKING SLIP

Bill To: PROVINCE OF ONTARIO

Shipment ID: 000012345 CANADIAN BLOOD SERVICES 1 MAIN ST Prepaid/Collect: LOVEMETENDER, ON FRACTIONATION Ship Via: L8N 3Z5 Req. Delivery Date: Order Date: 01-Jan-99 Patient Quantity Initials Product Description Issued Product Description Requested Qty Requested Qty Backordered For the Attention of UPV Lot # Issued RECOMBINATE FACTOR VIII FS 11810 IU EP CRAZY 8 500 444556BB 10 V Total # of Pieces: Misc. # of Pieces: Shipper: Verifier: \_\_\_\_\_ Total Weight: Misc. Weight: Acknowledgment: \_ Signature Date

IT IS A GOVERNMENT REQUIREMENT THAT A SIGNED COPY OF THIS VOUCHER INDICATING RECEIPT OF PRODUCTS BE RETURNED AS SOON AS POSSIBLE PLEASE SIGN AND RETURN TO THE CANADIAN BLOOD SERVICES

### Packing Slip Example 3

#### Canadian Blood Services LOVEMETENDER, CANADIAN BLOOD SERVICES PACKING SLIP

Shipment ID: 000011111

Prepaid/Collect: Ship Via: Req. Delivery Date:

Order Date: 01-Jan-99

Bill To: PROVINCE OF ONTARIO CANADIAN BLOOD SERVICES

FRACTIONATION

Ship To: GRACELAND MEMORIAL

1 MAIN ST

LOVEMETENDER, ON

L8N 3Z5

Product Description Requested	Qty Requested	Qty Backordered For the Attention of	Patient Initials	Product Description Issued	UPV	Lot #	Quantity Issued
RECOMBINATE FACTOR VIII FS	5000 IU		EP	CRAZY 8	500	444556BB	3 V
RECOMBINATE FACTOR VIII FS	11810 IU		EP	CRAZY 8	1000	111223AA	7 V
Shipper: Verifier:		Total # of Pieces: _ Total Weight:		of Pieces: . Weight:			
Acknowledgment:Signature		 Date					

IT IS A GOVERNMENT REQUIREMENT THAT A SIGNED COPY OF THIS VOUCHER INDICATING RECEIPT OF PRODUCTS BE RETURNED AS SOON AS POSSIBLE PLEASE SIGN AND RETURN TO THE CANADIAN BLOOD SERVICES

### 2.) Tracking Log (Facility to Patient)

## Regional Hemophilia Program Factor Concentrate Tracking System - Tracking Log (all products)

Page	of	
Please chec	k here if no p	roduct
	en issued	

This report covers the dates of January 1, 2001 to January 31, 2001

Date faxed (yy/mm/dd): February 4, 2001 To: Data Manager - FAX: (905) 555-7676

From-Facility: <u>Graceland Memorial Hospital</u> Name of Sender : <u>Lea</u>

- Enter each lot # issued on a single line. Include time of issue (24 hour clock).
- Please use column codes indicated below
- Fax to the above # each Wednesday even if no product has been issued (unless other arrangements have been made)
- For questions, please call Luke Skywalker at (905) 555-9555 ext. 555

1) Product Issued

Date of Issue (yy/mm/dd)	Time (24 Hr)	Patient Name (eg: J. Smith)	Brand/Product Hamu	Lot &	N of Viola	Home Caruf (YM)	Facility Arms*	Bleed Site, S or P**	Side R/L***	Adverse Rx (Y/N)
05-Jan-01	14:40	Prestey, Elvis	Crazy 8	71122344	6	Y				
7-Jan-01	15:05	Prestey, Elvis	Crazy 8	444556BB	2	N	0	S		N
29-Jan-01	9:20	Presley, Elvis	Crazy 9	44455688	7	N	С	Knee	I	N
		11.0000								
					-					
	- 1									
	7		7		1					Ī
			-		4					

<sup>&</sup>quot;Hospital Area: Clinic = C, Emergency = E, Operating Room = O or Ward = W.

""Side R/L Right or Left (eg: "L" for Left Knee).

2) Discarded / Transferred	/ Returned Product:		# of	Reason for disposal or return		
Date (yy/mm/dd) of action	Brand/Product Name Lot#		Vials	OR name of facility product was transferred t		
	4.0		767			

<sup>\*\*</sup> State Bleed Site (eg. Kneel, Elbow) or Surgery = S or Prophylasis = P.

## 3. Patient Infusion Diary

#### REGIONAL HEMOPHILIA CENTRE

NAME: <u>Elvis Preslev</u> YEAR 2001

					TENN_COUL	
BLEEDING EPISODE Date	January 7, 2001	January 14, 2001	January 11, 2001	January 15, 2801	January 20, 2001	January 22, 2001
Stile of Bleeding	Prophylaxis	Proofiviexts	Віееб – Я Клее	Prophylaxis	Prophylaxis	Precautionan
Cause	- ANNO 12 - 12 - 12 - 12 - 12 - 12 - 12 - 12	100	unk		-	Skiing
Meterial Used greenvary nasvaorins						5
Total Factor Units Lised						
INFUSION SITE qe. Not ibi q. generosti	r. wrist	1 <u>66</u> 7.	220	뀰	19 <u>88</u> 9	9 <u>4</u> 8
? Reaction equator completes			8			-
Took Medication opcomy apt and down						1
Days Off deceloration renderably			ts 0			
Day's Hospitalized						
Given Physiatherapy				Į.		
Visited Physician						
Used Crutches or Cane						
Other Physical liness						
IF ON HOME INFUSION						
LOT NUMBER:	111223AA	111223AA	111223AA	111223AA	111223AA	111223AA
20-1-4-11-4-21-4-1-4-1-1-1-1-1-1-1-1-1-1-1	r I vial	x l vial	x I vial	r ) vial	x I vial	x I vial
1			44455688			44455688
DEUCHDER			x 2 vials	3		x I vial
ANHLEGODA - LE DARC MAR		6				St.