

PSTRAX SUCCESS GUIDE:

CONTROLLED SUBSTANCES MODULE

These checklists are designed to help you implement PSTRax successfully, from initial setup to full deployment. Remember that we're here every step of the way, so feel free to reach out with any questions or adjustments.

» PHASE I: Review & Fine-Tune the System

- ☐ **Complete admin training.** Go to **Help > Admin Training > CS Module Training** to explore admin training tutorials. Or sign up for one of our weekly webinars [here](#).
- ☐ **Perform CS checks.** Click **Perform CS Check** from the Station Home screen and log the following checks:
 - **Restock** – Add vials into your main vault from an external vendor. For testing, we recommend adding around 25-50 fake vials. [Learn more](#).
 - **Transfer** – Move some vials from the main vault into one or more of your unit boxes. [Learn more](#).
 - **Inventory Count** – Verify the quantity of CS in your unit box(es). [Learn more](#).
 - **Usage** – Remove vials from your system by logging a usage event (Administered, Expired, Broken, Other). [Learn more](#).
- ☐ **View logs & reports.** Now that you have some data in the system, take a look at some of the reports under the **Controlled Substances** section in the navigation panel. [Learn more](#).
 - **Vial List** – Shows all active vials in your possession, with the ability to search, sort, filter, and edit vial information.
 - **CS Transaction Log** – Search by container, event type, and more to see all of the documented CS transactions.
 - **Vial Archive** – Shows all vials that have been removed from the system. Click **Details** to see a full history from acquisition to disposal.
- ☐ **Edit transactions.** In the CS Transaction Log (**CS > Logs & Reports**), administrators can make corrections to errant logs. Click on the link under the **Check Type** column to document a change. [Learn more](#).
- ☐ **Review CS containers.** In **Settings > CS > Manage Containers**, review the containers that we've built. Click **Edit** to adjust container settings and **Min/Max** to assign drug types and par levels to specific containers. [Learn more](#).

- ☐ **Review events.** Add custom fields, adjust signature labels, and more for all of your event types under **Settings > CS > Manage Events**. [Learn more](#).
- ☐ **Review vendors.** Add more vendors, hospitals, pharmacies, etc. that you can restock from in the **Manage Vendors** page (**Settings > CS**).
- ☐ **Set up alert recipients.** Alert recipients can be set by container to ensure that appropriate users receive notifications when issues arise. Go to **Settings > CS > Alert Recipients** to set up. [Learn more](#).
- ☐ **Adjust system settings.** Since the CS module is very customizable, there are a lot of options that can be modified, some of which are listed below. We encourage you to reach out to your Build Manager to discuss these options in more detail before enabling them.
 - **Inventory count options** – There are two options when logging an arriving/departing count: (1) verifying the quantity of CS, and (2) verifying the quantity AND vial information (exp. date, lot #, etc.) of each CS. Option 2 is recommended and set as the default.
 - **Tags** – If your drug boxes have seals/tags, the system can be configured to require old and new tag information by event type, add tag instructions for users, send alerts when there are tag discrepancies, and more. [Learn more](#).
 - **PINs** – PINs can be enabled to authenticate users and witnesses when logging CS transactions. [Learn more](#).
 - **Event names** – The name of each event type can be customized to match your naming conventions (“Transfer of Custody” instead of “Arriving/Departing”, etc.). [Learn more](#).
 - **Control numbers** – Control numbers are unique IDs attached to each vial. While it adds more work up front for administrators, it leads to fewer mistakes by crews and is much easier to troubleshoot when there is a discrepancy. There are several labeling options we’ve gathered over the years that you can read through [here](#).
 - **Drug types & fields** – Please let us know if you need to adjust your controlled substance types as you stock different drugs. The fields for your CS can also be customized to your liking (control #, lot #, exp. date, volume, concentration, NDC #).
 - **Status email time** – The Exception Report shows whether an inventory count has been done for each container. It can currently be sent at 11:30am local time (default) but can be changed to 3:30pm local time if desired.
 - **Fixed vs. movable containers** – In a fixed container setup, CS are replenished one-for-one into a unit drug box. (This is the most common setup for the agencies we work with). In a movable container setup, when one CS goes below min, the entire drug box is swapped out with a fully stocked box.

- ☐ **Review best practices.** Don't reinvent the wheel! Check out our Knowledge Base to see how other organizations are using PSTrax to track their controlled substances. [Learn more](#).
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» PHASE II: Roll-Out to Your Crews

- ☐ **Verify user information.** Go to your **Settings > Personnel > User List** to make sure all users who should have access to the Controlled Substances module are listed in PSTrax, and have the correct [permission levels](#).
- ☐ **Send login information to users.** You should have received username and password information from your Build Manager, but you can access it again from the **User List**. Pass this along to each user when you're ready to have them access the system.
- ☐ **Provide training materials to users.** Once they log into PSTrax, have users go through a step-by-step training checklist to learn the module in detail (**Help > User Training > CS User**). You can also post our [CS User Training Videos](#) into your training platform ahead of time.
- ☐ **Have users log events.** Allow a handful of users to log a test Arriving/Departing Check, Usage, and any other applicable events to verify that process in PSTrax matches your organization's policy. Any adjustments they note should be passed along to a CS Admin to review.
- ☐ **Make adjustments.** After identifying the necessary adjustments, collaborate with your Build Manager to facilitate the necessary changes. Since the CS module is highly customizable and variable to each agency's needs, we caution against making significant changes yourself without your Build Manager's input. Note that you may require multiple rounds of adjustments as you get input from more users.

» PHASE III: Go-Live with PSTrax

In order to successfully go-live with the Controlled Substances module, coordination between you and your Build Manager is crucial. There are certain things that must be done by you and certain things that only your Build Manager can do, so planning and communication is key. Here are the steps:

- ☐ **Pick a day to go-live.** Let your Build Manager know at least a few business days in advance so they can block off their calendar and prep accordingly.

- ☐ **Take an inventory of your vials.** Take a full count of all controlled substances in all containers (vaults, unit safes, vending machines, etc.) as close to your go-live date as possible. If possible, please put the information into our [import template](#). A few things to note when filling this out:
- ☐ **Take an inventory of your vials.** Take a full count of all controlled substances in all containers (vaults, unit safes, vending machines, etc.) as close to your go-live date as possible. To speed things up, please put the information into our [import template](#). A few things to note when filling this out:
 - There are six fields for each vial (Control #, Lot #, Exp. Date, Volume, Concentration, and NDC #). Fill out only the fields you plan to use and leave the rest blank.
 - Make sure the Container Name on the spreadsheet matches what the container is called in PSTrax. This helps us map things accurately.
 - As best as you can, ensure that the information is accurate and labelled consistently – especially when consolidating information from multiple people/spreadsheets.
- ☐ **We'll clear out test data.** All vials, transactions, and alerts added to your system in the testing phase will be deleted. None of the settings changes that have been made to your containers, events, users, etc. will be affected.
- ☐ **We'll import your CS inventory.** Once you send your import template, we'll clean everything up and import it into your system. Our goal is to have this done within 2 hours of you sending us the information.
- ☐ **Make adjustments prior to the go-live.** Continue to document any vials that get used or restocked between the time the CS inventory is imported and the go-live date in your old system. On the day of the go-live, update your vial list to reflect these changes – either by deleting vials that have been removed or logging a transfer or restock event.
- ☐ **Have crews take an initial inventory.** Direct your crews to log an initial inventory count (shift change, transfer of custody, etc.) first thing to ensure the vials they're signing off for reflect what they physically have. Any discrepancies can be corrected using the same methods listed in the "Make adjustments prior to the go-live" section above.