# Table of Contents

*Table of Contents* ................................................................. *i*

I. Introduction .......................................................................................... 1  
   A. Overview .................................................................................................................. 1  
   B. Roles .......................................................................................................................... 1  
   C. Usage Log Naming Conventions ........................................................................... 1  
   D. Visibility of Depleted Items ................................................................................. 1  

II. Functions of the Usage Log System .......................................................... 2  
   A. Log In ........................................................................................................................ 2  
   B. Acknowledge Receipt of Purchase Order or Transfer Items to Generate Usage Logs ................................................................. 2  
   C. View a Substance or Mixture Log .......................................................................... 4  
   D. Edit a Usage Log’s Details (name, purpose, expiration date) ...................................... 6  
   E. Create a Usage Log Entry ....................................................................................... 6  
   F. Edit or Delete a Usage Log Entry ........................................................................... 7  
   G. Create a Mixture ...................................................................................................... 7  
   H. Submit a Disposal Pickup Request ......................................................................... 10  
   I. Reporting Incorrect P.O. Item Details ..................................................................... 11
I. Introduction

A. Overview
The Controlled Substance Usage Log Guide is for persons ordering, using, or transferring Controlled Substances. The guide is intended to be a reference tool on how to perform different functions within the online system.

B. Roles
Each person has been assigned a role within the system. These roles are as follows:
1. **Authorized Custodian**: The Principal Investigator (PI) or approved designee within the requesting department who is authorized by the Program Administrator or designee to receive and store controlled substances.
2. **Authorized Users**: Person approved by the authorized custodian to use the controlled substance(s).

C. Usage Log Naming Conventions
1. **Substances Received Through Purchase**: The Usage Log name will contain a portion of the source PO number followed by a dash and a default, sequential number (e.g. 09005-01).
2. **Substances Received Through Transfer**: The Usage Log name will start with a “T” and include a date followed by a dash and a default, sequential number (e.g. T03DEC10-01).
3. **User Created Sub Containers**: The Usage Log name will contain the parent log’s name followed by an underscore and a default, sequential number (e.g. 09005-01_01).
4. **User Created Mixtures**: The Usage Log name will start with “MIX” followed by a dash and a default, sequential number (e.g. MIX-01).

*Note*: This sequential number portion of the Usage Log name can later be modified to something more meaningful.

D. Visibility of Depleted Items
1. Items whose log amounts have been completely depleted will disappear from the picklist options after a one-month duration. An option to view these historic items is forthcoming.
II. Functions of the Usage Log System

A. Log In
Log in with your Kerberos ID and password.

Result: **Controlled Substance Usage Log Management System** main screen opens with the option to select a Controlled Substance Authorization listed by building and room number.

1. From the **Authorization(s)** picklist, select the appropriate location (if applicable). If a user is only associated with one Authorization it will be selected by default.
   
   **Note:** The locations are listed by building and room number. You will only be able to view those locations that you are affiliated with.

   Result: **Substance(s)** and **Mixture(s)** picklists appear.

   **Note:** If a picklist does not appear next to the field, a note will state, “*none found*”

B. Acknowledge Receipt of Purchase Order or Transfer Items to Generate Usage Logs
Usage logs are created when the receipt of controlled substance items is acknowledged through either a purchase or transfer. If pending receipts are present, they will be displayed as such when a substance is selected from the **Substance(s)** picklist.

1. **Receipt of Purchase Order Items**
   Acknowledging the receipt of purchase order items is handled slightly differently depending on whether the Authorization’s location is in Davis or Sacramento.
Sacramento Locations:

a. Select the number of boxes received from the **Box(es) Received** picklist

   ![Box(es) Received Picklist]

b. Select your desired log creation basis. Usage logs can either be created one per vial/container or one per box. Take care in this decision as it cannot be reversed.

   ![Log Creation Basis]

c. Click [**acknowledge receipt**] to complete the process and generate the logs.

Davis Locations:

a. Since the items will have already been received at Distribution Services, the quantity of boxes is fixed. If multiple partial receipts are represented each will appear as a separate line item.

   ![Received at Distribution Services]

b. Select your desired log creation basis. Usage logs can either be created one per vial/container or one per box. Take care in this decision as it cannot be reversed.

   ![Log Creation Basis]
c. Click [acknowledge receipt] to complete the process and generate the logs.

2. Receipt of Transfer Items
To acknowledge the receipt of a transfer item and generate a new usage log, click [acknowledge receipt].

Note: Transfers requested through a Usage Log entry will be represented by one container.

C. View a Substance or Mixture Log

1. Select the Substance or Mixture you want to manage.
   
   Result: Usage Log(s) picklist appears.

2. Select the usage log number you want to view.
   
   Result: Usage Log details open below.

Note: For Substances, The Usage Log picklist will contain every usage log associated with the selected substance regardless of source PO or Transfer. The Usage Log picklist can be refined for substances by checking the checkbox to restrict the list to only the source PO or Transfer of a selected log.

Note: Once a Usage Log’s total amount has been depleted a message as such will be displayed in the picklist next to the log name.

The Usage Log picklist may also be refined by source PO or Transfer by selecting the relevant source item.
D. Edit a Usage Log’s Details (name, purpose, expiration date)

1. Follow the steps in View a Substance or Mixture Log to locate the log you would like to work with.

2. In the displayed Usage Log header next to the Usage Log Name, click (edit log details).
   Result: Editable fields appear, including Usage Log Name, Purpose, and Expires.

3. Input the desired information and click [save changes].

4. If you do not wish to save any changes, click [cancel & return].

E. Create a Usage Log Entry

1. Follow the steps in View a Substance or Mixture Log to locate the log you would like to work with.

2. In the displayed Usage Log details, click [create log entry].
   Result: Log entry form appears.

3. From the Action picklist, you have the option to select dispense, sub container, transfer request, and disposal request. Select the appropriate action.

Fillable fields common to all actions include Date, Amount, and Comments.
Note: The Comments action will be auto populated with the most recent dispense entry’s comments when dispense is selected.

- **Dispense**

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Amount</th>
<th>Balance</th>
<th>Dispense By</th>
<th>Dispense To</th>
<th>Comments (500 char.max)</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-01-2017</td>
<td>dispense</td>
<td>0.000</td>
<td>1.520 ml</td>
<td>Barter, Thomas</td>
<td>=select=</td>
<td></td>
<td>submit</td>
</tr>
</tbody>
</table>

When dispense is selected you will need to provide **Dispense By** and **Dispense To** information. Both picklists are populated with the authorization’s custodian and authorized users with the **Dispense By** field defaulting to the logged in user. A link to information on how to update an authorization’s roster is provided in the case an authorized user is not present in the picklist.

- **Sub Container**

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Amount</th>
<th>Balance</th>
<th>From</th>
<th>To</th>
<th>Comments (500 char.max)</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-01-2017</td>
<td>sub container</td>
<td>0.000</td>
<td>1.520 ml</td>
<td>-</td>
<td>-</td>
<td></td>
<td>submit</td>
</tr>
</tbody>
</table>

When sub container is selected only the amount and comment fields are needed. **Note:** This option is for the simple creation of a sub container of a single substance without any dilution. Creating a diluted substance is handled under the **Mixture** section.

- **Transfer Request**

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Amount</th>
<th>Balance</th>
<th>Receiving Custodian</th>
<th>Receiving Location</th>
<th>Comments (500 char.max)</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>09-01-2017</td>
<td>transfer request</td>
<td>0.000</td>
<td>1.520 ml</td>
<td>=select=</td>
<td>=select=</td>
<td></td>
<td>submit</td>
</tr>
</tbody>
</table>

When transfer request is selected, you will need to provide a receiving authorization. This is accomplished by first selecting a **Receiving Custodian**, which will then populate the **Receiving Location** picklist with those locations belonging to the selected custodian. Once submitted a notification will be sent to the receiving custodian and an alert will appear on the receiving authorization’s Usage Log Management page with an option for acknowledging the receipt. Prior to the receiving authorization acknowledging the receipt, the transfer request may be rescinded by clicking the delete option for the log entry. **Note:** Transfers will not be complete until the receiving authorized custodian or authorized user accepts the transfer. The **Action** column will show (receipt pending) until the receipt has been accepted. Once it has been accepted the **Action** column will show (substance rec’d <date>).
• Disposal Request

When disposal request is selected only the amount and comment fields are needed. By default, the amount field is populated with the remaining amount available on the log. Once submitted the substance and amount are flagged for disposal along with any other prior disposal requests awaiting a pickup request submission. This will be presented as an alert near the top of the page and is where a disposal pickup request can be submitted. Section H. provides additional information for submitting the pending disposal request(s).

F. Edit or Delete a Usage Log Entry

1. If a log entry can be modified or removed, the options will appear in the last column of the log entry. Log entries that cannot be modified or removed in this fashion include an initial balance entry, a mixture component, a disposal request, a sub container item where the sub container’s usage log has had any activity/use, and a transfer request that has been acknowledged by its recipient.

G. Create a Mixture

1. Click (manage mixtures) next to the Mixture(s) field in the upper left corner.

   Result: Manage Mixtures/Create Mixture Container popup window opens.

2. To create a new mixture name, click create new name and complete the form.
3. To proceed with an established mixture name select the name from the **Mixture Name** picklist. At this point, if a mixture has not been used, it may be deleted or modified by using the respective links. If a mixture name has been used there will be a **retire name** option allowing you to remove a mixture name from your mixture name picklist without affecting prior logs that have used the name.

![Image of Mixture Name picklist]

4. Click **[Continue with this Name]**.

![Image of Create Mixture Container and Usage Log]

At this point you will have the option to give the container/usage log a name, expiration date and purpose. These fields are optional at this point as they are with a substance container’s usage log. If the container/usage log name is left blank, a sequential number
will be assigned that can be modified later. A **Container Size** and **Concentration** are required to correctly calculate the resulting mixtures concentrations.

5. At this point substances (controlled and non-controlled) can be added to the new mixture container. Choose an appropriate option from the **Available Substance(s) to Add** picklist.
   - For **non-controlled substances**, select **Other NON-controlled Substance** and enter in the substance name.
   - For a **controlled substance**, select the desired substance and, then, select the desired source usage log from the **Available Log(s)** picklist.

6. Input the amount of the substance into the **Amount to Add** field.
   **Note:** There will be text to the right of the field stating how much is available to add.

7. Click **[Add Substance to Mixture]**.
   **Result:** The contents will appear in the **Mixture Contents** grid on the right side of the screen.
At this point a substance can be removed from the mixture by clicking on the red X to the right of the line item.

8. To complete the mixture container creation process click [Create Mixture Container].

H. Submit a Disposal Pickup Request

1. Once a log entry for a disposal request has been created and that item has been added to the list of disposal items awaiting submission for a pickup request, an alert will appear to notify you of the pending items.

2. Click the (view) link when ready to submit disposal pickup request for all items. Result: Disposal Request Submission box opens. This box will list all items flagged for disposal.

   ![Disposal Request Submission](image)

   **Note:** If any items need to be removed from the disposal request list, click the red X on the right side of the box. This will add the substance/mixture amount that was specified back to its respective usage log.

3. Select the appropriate name from the Contact picklist, and input a Preferred Telephone Number. **Note:** These fields are required.

4. Input Comments, if necessary or if any special pickup instructions should be provided to the Environmental Services Facility crew.

5. Click the checkbox next to the statement “I, <name>, certify that the disposal items are properly sealed and labeled.”

6. Click [Submit Disposal Request]. A pickup request will be generated and sent to the Environmental Services Facility.
I. Reporting Incorrect P.O. Item Details

1. On the main Controlled Substance Usage Log Management System screen, click report incorrect PO item details (found about mid-screen under the two main columns).
   Note: If you find a discrepancy in the displayed Purchase Order details it would be best to use this form prior to acknowledging the PO item receipt and generating new Usage Logs.

   Please describe the erroneous condition of this P.O. item:

2. Input text to explain the issue.

3. Click [submit].
   Result: An e-mail will be generated and sent to Distribution Services.