USING MIDATABANK: TIPS FOR MI MANAGERS

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Managing Enquiry Categories

MiDatabank is supplied with the usual MI enquiry categories already in place, such as 'administration/dosage', and 'adverse effects'. However, you may wish to add others to your centre:

- You may have a lot of a certain type of enquiry that doesn't quite fit into the usual categories, or is a sub-set of them, e.g. 'HIV drug interactions', or 'legal and ethical'.
- You may wish to be able to track whether enquiries are clinical or not, by adding a category.

Selecting the Categories you wish to use in your MI Centre

When setting up MiDatabank for the first time, you will need to select the categories of enquiries you wish to use.

1. Open the MiDatabank Admin program.
2. Go to Centres>MI Categories.
3. Click on the 'Choose from Master List' button under the bold Categories Available at this Centre title.
4. Tick all the enquiry categories you wish to use/untick the ones you do not wish to use.
5. Click 'OK'.

Adding a new Category

This will add a category to your department's MiDatabank. In the 'Enquiry Manager', it will appear in the 'Other Categories' section, below the 'Core Categories' section in the right-hand column of the input screen.

1. Open the MiDatabank Admin program.
2. Go to 'MI Categories Master List'.
3. In the bottom left-hand corner of the screen, click 'new'.
4. Enter the name of the new category, and press 'OK'.
5. Go to Centres>MI Categories.
6. Click the 'Choose from Master List' button under the bold Categories Available at this Centre title.
7. Tick all the categories you wish to use.

Deleting a Category

You can only delete categories that you have added (so not the "core categories" that come with the system), and have not been used in any enquiries.

1. Open the MiDatabank Admin program.
2. Go to Centres>MI Categories.
3. Click on the 'Choose from Master List' button under the bold Categories Available at this Centre title.
4. Untick the category you wish to delete.
5. Go to 'MI Categories Master List'.
6. Select the category you wish to delete.
7. In the bottom left-hand corner of the screen, click 'delete. Then click 'OK' when prompted.

Standard Search Patterns

MiDatabank is supplied with standard search patterns which suggest resources to use for each category of enquiry. You may wish to alter these, either because:

- You hold extra resources
- You do not hold some of the resources suggested
- You would like people to use the resources in a different order
- You have added extra categories.

Editing Standard Search Patterns

Core Categories

1. Open the MiDatabank Admin program.
2. Go to Centres>MI Categories.
3. Highlight the category you are going to edit.
4. In the right-hand column titled Standard Search Pattern, tick the 'Over-Ride' box.
5. To add a new resource, click the '+' button and select the collective title of the resource you wish to add.
6. To remove a resource, highlight the resource in the list and click the '-' button.
7. To change the position of a resource in the list, select the resource and use the blue up and down arrow buttons.

'Other' Categories

1. Open the MiDatabank Admin program.
2. Go to 'MI Categories Master List'.
3. Highlight the category you are going to edit.
4. Go to the right-hand column titled Standard Search Pattern.
5. To add a new resource, click the '+' button and select the collective title of the resource you wish to add.
6. To remove a resource, highlight the resource in the list and click the '-' button.
7. To change the position of a resource in the list, select the resource and use the blue up and down arrow buttons.

The Helper

The 'helper' panel in MiDatabank is the panel that appears on the left-hand side of the screen in an open enquiry if you tick the 'show helper' box. The contents of the box change depending on the type of enquiry and the place within the enquiry, but it is designed to prompt inexperienced members of staff on how to deal with the various parts of handling the enquiry. You can set your own contents for the input section of each type of enquiry, but not for the MI research, answer or completion sections.

Editing the Helper

Core Categories

These are the standard categories that are already set up on MiDatabank when it is supplied, e.g. 'administration/dosage', or 'adverse effects'.

1. Open the MI Databank Admin program.
2. Go to Centres>MI Categories.
3. In the second column, select the category you wish to edit by clicking on it. It will highlight in blue.
4. In the middle of the screen (the third column), where it says 'Helper Panel' with a tick-box for 'over-ride', tick the box. This will override what CoAcS put in the box (if anything).
5. Type (or cut-and-paste) your chosen text into the box.

'Other' Categories

These are the categories that you added to MiDatabank yourself.

1. Open the MI Databank Admin program.
2. Go to 'MI Categories Master List.'
3. In the first column, select the category you wish to edit by clicking on it. It will highlight in blue.
4. Type (Or cut-and-paste) your chosen text into the large box in the middle, entitled 'Helper Panel'.

Setting the Helper to Appear by Default

Any member of staff can see the helper by ticking the 'show helper' box in the bottom left-hand corner of the screen in the Enquiry Manager. However, you can decide whether the helper should be shown by default, or not, for each member of staff.

You may wish to have the helper shown by default for new members of staff, and to hide it by default for more experienced staff.

To set the helper for a member of staff:

1. Open the MI Databank Admin program.
2. Go to Centres>Users.
3. Highlight the staff member you wish to edit.
4. Click 'edit user'.
5. In the box that appears, in the 'User Details' tab, underneath Properties for New Users, tick the 'always show Helper' box.
6. Click 'OK'.
7. To set the helper so that it does not appear by default, untick the 'Always Show Helper' box, and click 'OK'.

Best Use of the 'Frequently Asked Questions' Function

MiDatabank has a 'Frequently Asked Questions' function. FAQs have the following sections:

1. Title.
2. Text (a single text box).
3. Facility to add attachments.
4. Keywords.
5. Category.
6. Review date (one year or two years).

There is no space for research, and no separate question and answer box. Therefore, FAQs are most useful for those little Trust-specific things that everybody who has worked in your Trust 'just knows' but are mysterious to outsiders.

For example:

Title: What is Miss Tracey's Mixture?

Text: Miss Tracey's Mixture is an extemporaneous mixture of nystatin and lidocaine gel. It was developed by Miss Tracey (a pharmacist) to treat mouth ulcers in children with leukaemia as it was difficult to get children to hold nystatin liquid in their mouths. The gel thickens the liquid and anaesthetises the mouth.

Miss Tracey's Mixture contains 50,000 units/mL nystatin and lidocaine 1%.

FAQs are not suitable for:

- Anything where a lot of research has to go into writing it. For that kind of thing, either use an ordinary MI enquiry, or a project.
- Anything where you will need a more complex 'output' than just a title and text.

Note: In order for a user to be able to edit or allocate FAQs, they have to be set up for it in the MiDatabank Admin Program.

Enquiry Authorisation in MiDatabank

If you have trainees in Medicines Information, you probably check their enquiries before the answer is given out. It is therefore useful to be able to see at a glance those enquiries which the trainee *thinks* are complete and ready for the enquirer to be contacted, but haven't yet been signed off by a more senior member of staff. MiDatabank has functionality to allow you to do this.

Setting Authorisation Permissions for a User Account

When you set up a new user's account in the Administrator module, in the "User Details" tab, there is a section in the bottom-right-hand corner called "Permissions for documents". This is where you set up what the user can do.

- **Edit Enquiries** means that the user can work on enquiries. If you don't tick this, then the account will be read-only.
- **Allocate Enquiries** means that the user will be able to allocate enquiries to themselves or others. Unless your MI centre is set up so that only senior staff can decide who does what, then always tick this box. It's useful for everyone to be able to allocate enquiries to themselves (if there's something that needs doing and they have the capacity) or to someone else (if that person needs to give input).
- **Reply** means that:
  - o *If ticked,* the user will be able to mark enquiries as "research and answer complete" then "completed" without any intervention from anyone else. Tick this box for members of staff who do not need to have their enquiries checked by anyone else.
  - o *If not ticked,* when the user marks an enquiry as "research and answer complete" instead of it moving into the "Reply Authorised" tray in MiDatabank, it will move into the "Awaiting Authorisation" tray. The user will not be able to complete the enquiry until it has been authorised by someone else, so this option is suitable for trainees/inexperienced staff. Note: once the enquiry has been authorised by someone else (see below), the trainee will be able to "complete" the enquiry and file it.
- **Permissions for experienced users: Can authorise reply** means that, if ticked, the user will be able to authorise enquiries which have been put in the "Awaiting Authorisation" tray. Tick this box only for experienced staff who are competent to check others' enquiries.

Authorising Enquiries

If you have set up a user so that their enquiries require authorisation, actually authorising the enquiries is very easy to do.

- The person authorising the enquiries must have their account set up so that the **"Permissions for experienced users: can authorise reply"** box is ticked in the Administrator module.
- To authorise an enquiry, go into the **"Awaiting Authorisation"** tray in the MiDatabank "In Progress" screen.
- Click the white **"Open for Reply Authorisation" button,** *not* the "open" button.
- Do the necessary checks, then go to the "MI Answer" page. There will be three "radio" buttons underneath the answer:
  - o **In Progress:** if you click this, it will put the enquiry back into the "In Progress" tray. This is for when you are not satisfied with the enquiry as it is.
  - o **For Authorisation:** this is usually greyed-out when you open the enquiry, because that is where the enquiry is now.

     ○   **Authorised – Reply Pending:** if you click this, it will move the enquiry to the "Reply Authorised" tray, and anyone will then be able to click "Enquiry Completed" and file the enquiry after giving out the answer.

Note: If, when you go into the "Awaiting Authorisation" tray, you click the "Open" button instead of "Open for Reply Authorisation", you will not get the radio buttons to authorise the enquiry.

If you want to add comments to the enquiry (e.g. a name/date stamp with ctrl+M), you will need to allocate the enquiry to yourself and then move it to the 'in progress' tray. Once you have added comments, assign it back to the trainee *but leave it as 'In progress'* – do not click 'Research and Answer Complete'. If you click 'Research and Answer Complete', the enquiry will go into the 'Reply Authorised' box without the need for a further authorisation step.

The trainee, when they take the enquiry back, will then need to click 'Research and answer Complete' themselves, which will move the enquiry into the 'Awaiting Authorisation' tray again, at which point you can complete the authorisation process above.

The Reporter

MiDatabank has some ability to construct workload reports, although it will not draw graphs. It is worth playing with the Reporter and exploring all the sections to see how you can make it show the reports that are most useful to you.

The reporter section is in the Enquiry Answering part of MiDatabank (not the MiDatabank Administrator). Open it by clicking 'File' in the top left-hand corner of the screen, then selecting 'Reporter' from the drop-down menu.

Different Types of Report

MiDatabank can run several different types of report. These are the tabs across the top. Once you have run the report, you can switch between different types of report and print off any (or all) that you want.

Workload

This is the 'standard' report, showing a list of the characteristics of your enquiries (depending on the filters and sections you chose), with the number of enquiries and percentage of the total.

Enquiries

This is a list of enquiries (including titles), together with whichever details you have chosen to include (e.g. enquirer, who completed the enquiry).

Staff

The Staff Report shows a list of staff who have completed enquiries during the time period, the number of enquiries they completed, and the total time spent on enquiries.

Other

This report is intended to give an indication of keyword and origin trends. It shows the top 20 enquiry origins and top 20 keywords for the period.

ADR Submissions

If you have submitted any Yellow Card reports via MiDatabank, you can see a list of them here.

Selecting the Information You Wish to Show

Filters

In the 'Filters' section, you select what information you want to include in the report. As you tick each box, options will appear. For example, if you tick 'Keyword 1', you will get a box to choose a keyword. If you tick 'Enquirer', you will get a button that will allow you to choose from all of the enquirer names in your database. Many of the tick-boxes and radio buttons, once clicked, open up more choices, so make sure you pay attention.

There are two tabs in the 'Filters' section – 'Main', which is the one that shows by default, and 'Categories', which you can see by clicking on the tab. The 'Categories' tab contents show up blank by default. However, if you select 'Enquiry Type' and then 'MI', the Categories tab will populate with all of the potential Enquiry

Categories you have. If you leave this blank, then the report will include all categories. If you only want to report on some categories (e.g., Interactions), then tick that category and run the report.

Sections

The 'Sections' section is where you select what information sections you want to have in your report. There are different choices depending on the type of report you have selected.

Running the Report

1. Select the dates between which you wish to run the report in the date boxes at the top of the screen.

2. Press the yellow 'Show Report' button.

When you have run the report, you can print it or save it using the 'print' and 'save' buttons.

Non-MI Pharmacists Using MiDatabank

You may wish to have non-MI pharmacists use MiDatabank, either to be able to search past enquiries, or add enquiries of their own to complete themselves or to hand over to MI. Either way, you may find it useful to mark which users are MI staff, and which are not.

Marking which users are MI and which are not has two benefits:

1. If they are doing their own enquiries, you can choose not to see those in the MI work trays, by selecting the 'Show Med Info Enquiries' button at the top of the screen.
2. If you are running reports, you can choose to run a report either for MI staff only, non-MI staff only, or both.

Marking Staff as MI or not

When you set up a member of staff on MiDatabank in the Administrator, in the User Details screen, there is a box titled 'User is Med Info'. If you tick this box, the user will be regarded as MI; if you make it blank, the user will be non-MI.

Running Reports

In the MiDatabank Enquiry Manager, go to the top-left corner of the screen and select 'file'. Then select 'reporter' from the drop-down box.

On the right-hand side of the screen, there are two large boxes of filters. The top box has two tabs (Main, and Categories) and a slider bar. Slide the bar down as far as it will go. This will expose more choices, one of which is 'User is MI'.

If you tick 'User is MI', this reveals two 'radio buttons', where you can select Yes or No. This allows you to run reports for only MI staff or only non-MI staff. If you leave the 'User is MI' box unticked, the report will include all staff whether they are MI or not.

Renewing the Licence

Renewing your MiDatabank licence is a fairly simple process, but there are several stages.

When it's nearly time to renew (generally about a month before the licence will expire), MiDatabank will show a warning when you log on. The warning will be shown every day until the renewal process is started. To start the renew process:

1. Log on to the Administration module.
2. Highlight your centre in 'Centres managed by System' and go to the 'Configuration' tab.
3. In the 'Configuration' tab, on the right-hand side, there is a section labelled 'Annual licence renewal'. Click the 'Request Renewal' button.
4. Enter the email address to which you would like the renewal forms sent in the box that comes up.
5. CoAcS will send renewal forms to the email address you entered. Complete and return the form.
6. CoAcS will send an 'electronic key' code to the stated email address.
7. When you have received the code, go back into the Configuration tab, and click 'Update Licence'. Copy and paste the code into the relevant box and click 'OK'.

8. That's it. You're done.

Do *not* interfere in any way with the software licence codes except when updating the licence, as this may cause system failure.

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