PhIX Full User Manual

Instructional + Compliance-Aware Edition (Pharmacy Staff Version)

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1. Welcome to PhIX

PhIX is a secure, Canadian pharmacy platform designed to help pharmacy professionals report, analyze, and learn from medication incidents. It supports safer practice through Continuous Quality Improvement (CQI), self-assessment, and compliance with the Alberta College of Pharmacy (ACP) Standards and the Assurance and Improvement in Medication Safety (AIMS) program.

Purpose

This manual provides comprehensive guidance for everyday users of PhIX—pharmacy staff who report incidents, conduct assessments, and participate in CQI meetings.

Core Principles

- **Confidentiality:** No patient identifiers are collected.
- **Accountability:** All submissions are tracked under licensed user roles.
- **Improvement:** Data drives actionable change.
- **Compliance:** PhIX aligns with ACP/AIMS expectations.

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2. Access and Roles

System Requirements

Use the latest version of Chrome (recommended), Edge, or Safari on desktop or laptop.

💡 **Tip:** Clear your browser cache periodically for smoother operation.

Logging In

1. Navigate to the PhIX login page.
2. Enter your registered email and password.

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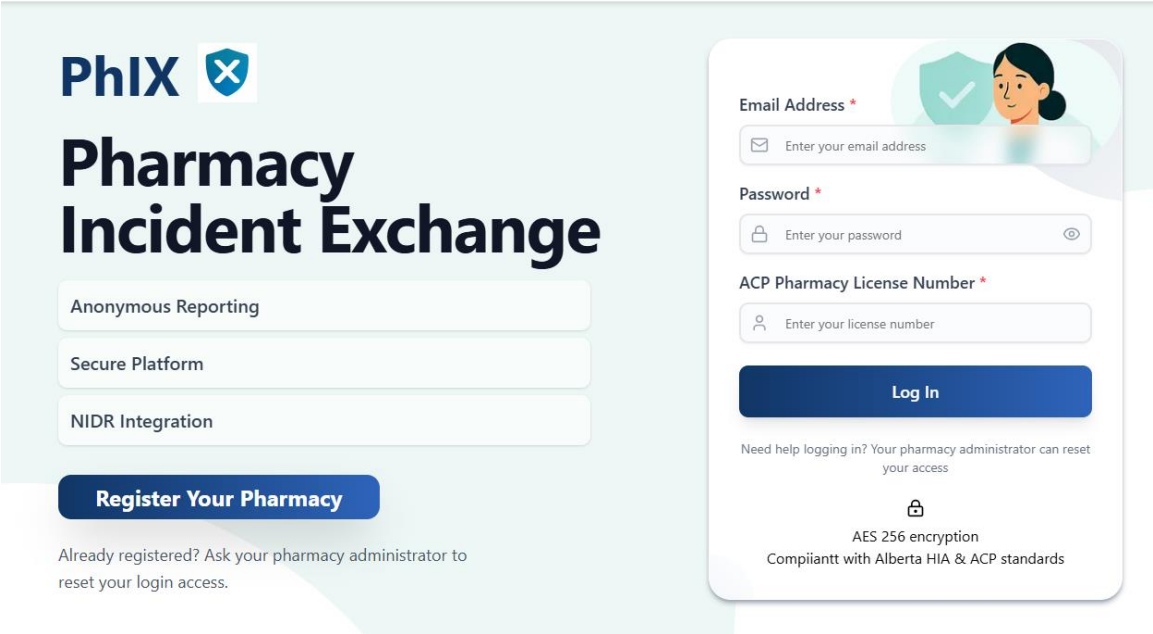
3. Select **Login** to enter the Dashboard.



If you forget your password, click **Forgot Password** to receive a reset link.

User Roles and Permissions

Role	Typical Permissions
Manager / Licensee	Full control: users, analytics, CQI
Pharmacist	Report incidents, view analytics, perform self-assessment
Technician / Assistant	Report incidents, view summary data
Student	Draft incidents (if enabled by manager)

⚠ **Compliance Reminder:** Access must reflect each team member's role under ACP Standards.

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3. Interface Overview

Dashboard Layout

The Dashboard is the starting point after login. It provides quick access to:

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- Report an Incident
- View Analytics
- Start Self-Assessment
- Plan CQI Meeting

🖼️ **[Screenshot Placeholder – Dashboard]**

Sidebar Menu

Dashboard | Incident Reporting | Analytics | Self-Assessment | CQI Meetings | Admin

💡 **Tip:** Hover over sidebar icons to see text labels.

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4. Onboarding Workflow – First 7 Days in PhIX

Day	Task	Objective
1	Log in, explore Dashboard	Recognize modules
2	Open a sample incident	Understand required fields
3–4	Submit a practice incident	Learn submission workflow
5	Review Analytics	Interpret reports
6	Complete Self-Assessment	Understand compliance mapping
7	Conduct CQI Meeting	Document team discussion

💡 **Tip:** Managers can use this 7-day schedule as an internal onboarding plan.

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5. Dashboard Module

Purpose

The Dashboard summarizes your pharmacy's engagement with PhIX. It provides immediate visibility of pending tasks, recent incidents, and CQI activity.

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Key Elements

- **Incident Summary:** Number of new and reviewed reports.
- **Self-Assessment Progress:** Status bar for completion percentage.
- **CQI Tracker:** Scheduled and completed meetings.

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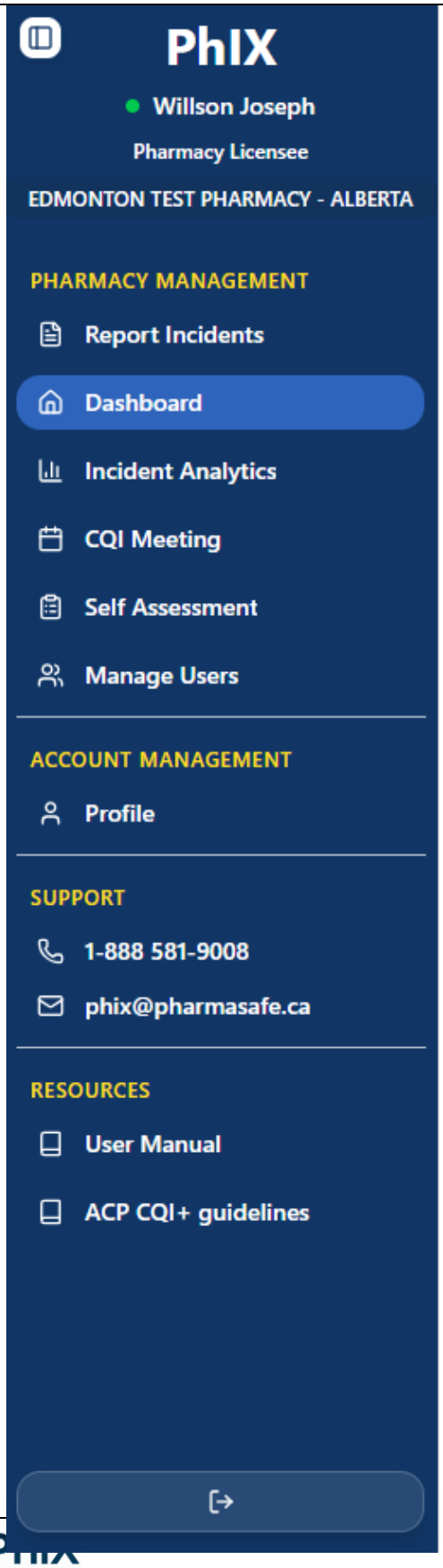

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💡 **Tip:** Use the Dashboard weekly to monitor participation and identify overdue actions.

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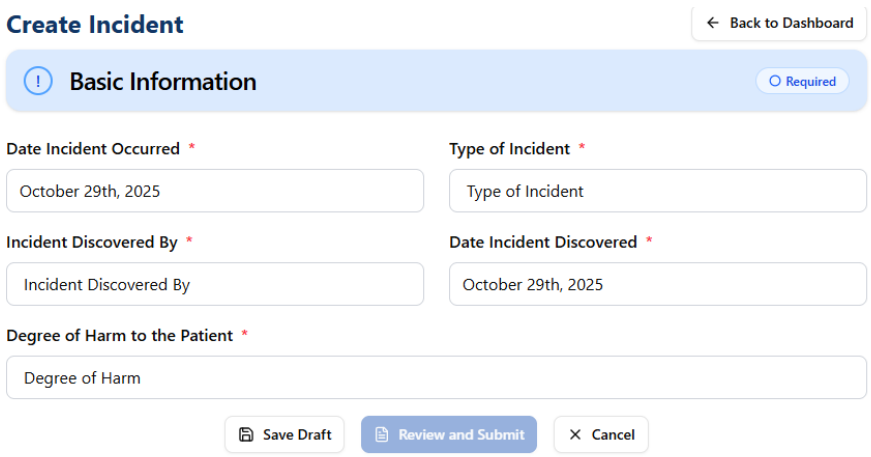
6. Incident Reporting Module

Purpose

To report medication incidents and near misses confidentially for learning and system improvement.

Creating a Report

1. Select **Incident Reporting** → **Create Incident**.
2. Complete all mandatory fields (*date, description, incident type*).
3. Classify the incident as *actual* or *near miss*.
4. Record contributing factors and actions taken.
5. Click **Submit** to save your entry.



💡 **Tip:** You can save an unfinished report as a draft and return later.

Mandatory Fields

- Date of incident

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- Category (dispensing, prescribing, communication, etc.)
- Severity
- Contributing factors
- Description

⚠ **Compliance Note:** Do not enter any patient names, initials, or identifiers. Reports must remain de-identified in line with ACP and AIMS standards.

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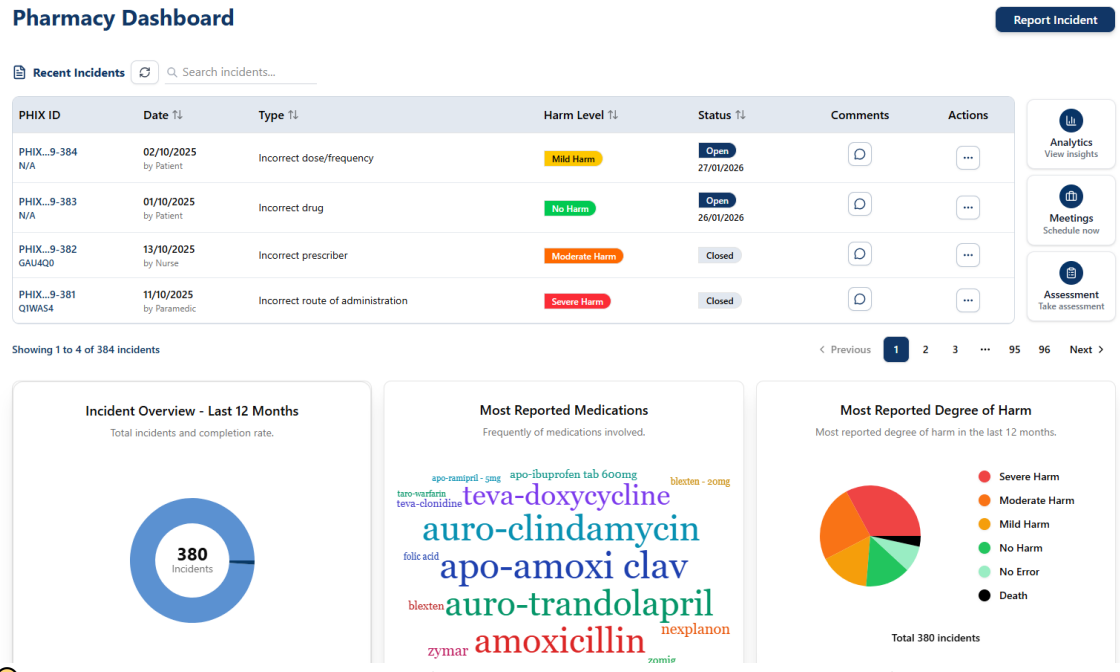
7. Reviewing and Managing Reports

- Access all reports under **Incident Reporting → View Reports**.
- Use filters (date, type, reporter).
- Click on a report to open details.
- Edit only drafts; submitted reports are locked.
- Managers can view aggregated reports for their pharmacy.



💡 **Tip:** Use the Analytics module for overall incident trends instead of reviewing individual reports.

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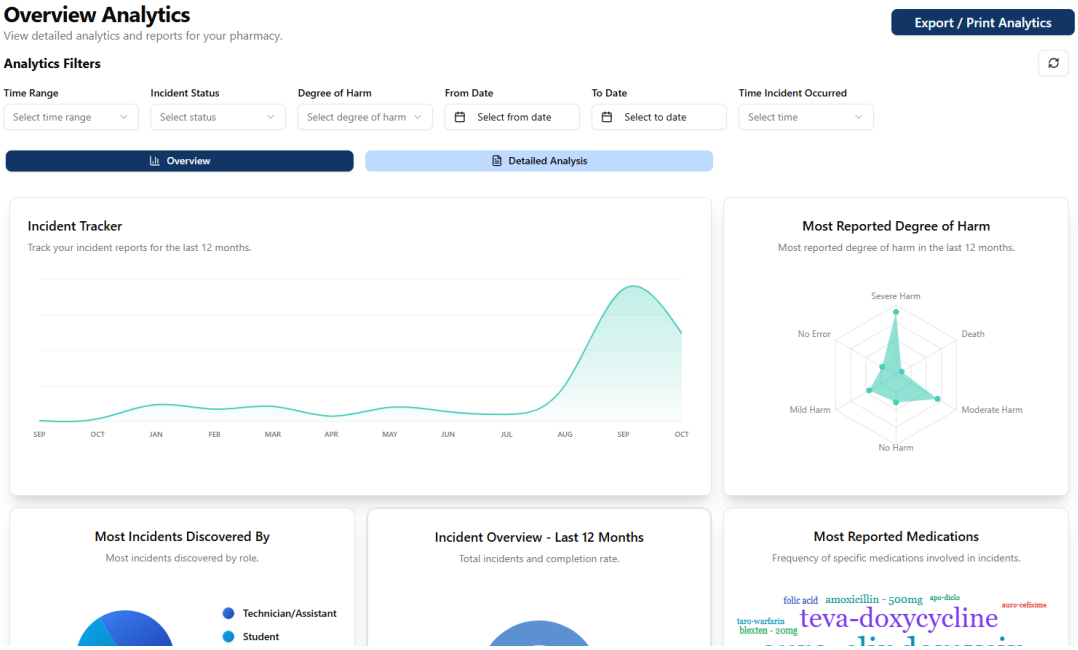
8. Analytics Module

Purpose

Provides visual insight into trends, contributing factors, and high-risk areas to guide safety improvement.

Viewing Analytics

1. Go to **Analytics** from sidebar.
2. Apply filters (date range, incident type).
3. View charts: Incident Frequency, Type Distribution, Severity Trends.



Exporting Reports

Click **Export** → **PDF** or **Excel** to create shareable summaries.

💡 **Tip:** Use exported analytics during CQI meetings or ACP inspections.

⚠️ **Compliance Note:** Data exported from PhIX is de-identified and should remain within CQI documentation.

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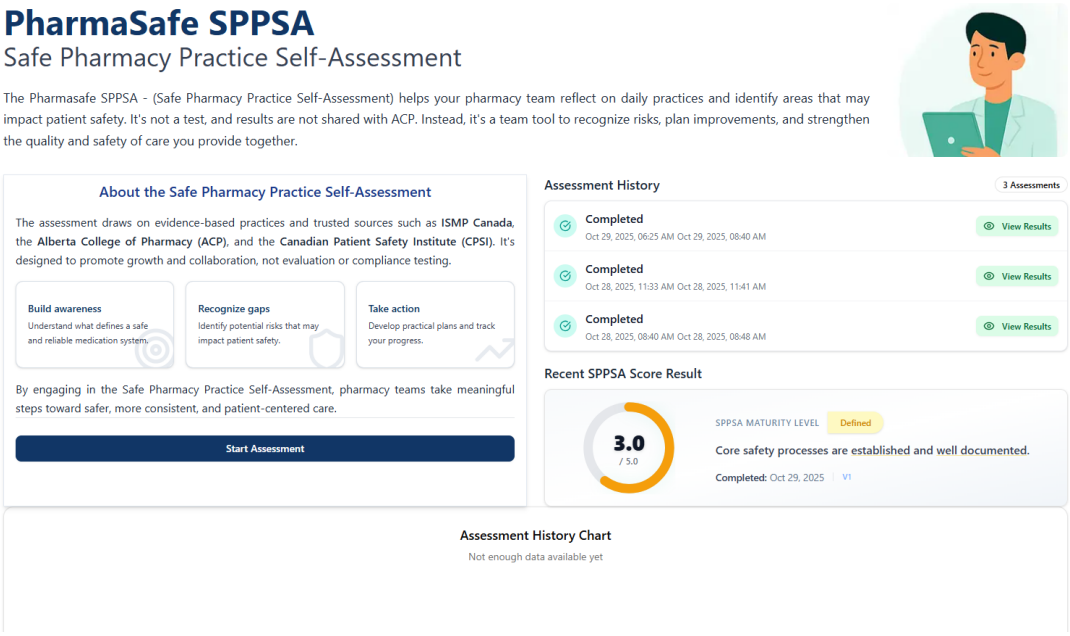
9. Self-Assessment Module

Purpose

Allows pharmacy staff to evaluate practice against ACP Standards and identify improvement areas.

How to Complete

1. Open **Self-Assessment** from the sidebar.
2. Click **Start New Assessment**.
3. Answer each question honestly.
4. Save progress any time.
5. Submit when complete.



💡 **Tip:** Use responses to guide internal training and CQI meeting discussions.

⚠️ **Compliance Note:** At least one full self-assessment should be completed annually as part of the pharmacy's CQI plan.

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10. CQI Meetings Module

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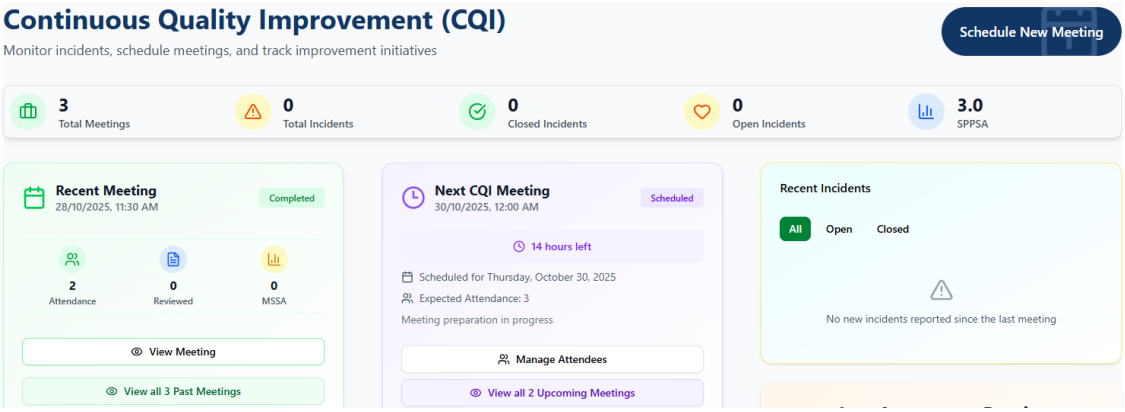
Purpose

To document regular CQI meetings, track discussions, and record action items.

Creating a CQI Meeting Record

1. Navigate to **CQI Meetings** → **Plan Meeting**.
2. Enter meeting date, participants, and agenda items.
3. Document incidents discussed and decisions made.
4. Record action items and assign responsibility.
5. Save and mark meeting as **Completed**.



💡 **Tip:** Hold meetings monthly or as required after significant incidents.

⚠️ **Compliance Note:** ACP requires documentation of CQI activities demonstrating continuous learning.

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11. User Management & Permissions

Purpose

Available to Managers/Licensees to manage pharmacy accounts and permissions.

Steps

- Go to **Admin** → **Manage Users**.
- Click **Add User** to invite staff by email.

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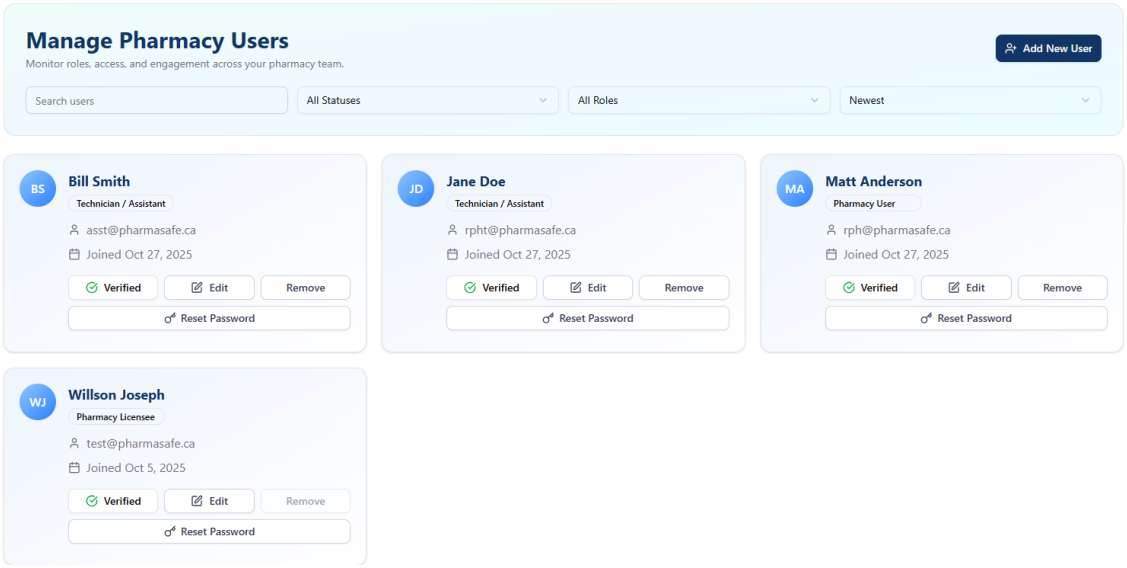
- Assign role and permissions.
- Deactivate users who leave the organization.



💡 **Tip:** Review the user list quarterly to ensure accuracy.

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12. CQI Case Study Example

Scenario

An incorrect strength of medication was selected during dispensing but intercepted before reaching the patient.

Process in PhIX:

1. Staff member reports near-miss via **Create Incident**.
2. Manager reviews contributing factors (look-alike packaging).
3. Analytics shows repeated errors with similar drug names.
4. CQI meeting held → decision: separate stock placement, staff reminder.
5. Improvement logged; trend re-checked one month later.

💡 **Lesson:** Incident reports support proactive system fixes rather than blame.

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13. Best Practices for Safe Reporting

✅ Do's

- Report promptly after an incident or near miss.
- Include clear, factual information.
- Review reports with team regularly.

🚫 Don'ts

- Use names or patient data.
- Modify submitted reports.
- Delay entries beyond one week of occurrence.

💡 **Tip:** Encourage a *just culture*—focus on learning, not punishment.

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14. Data Privacy and Security

- All data transmitted via encrypted HTTPS connection.
- Reports and analytics are anonymized before aggregation.
- Access limited to authorized users.
- No identifiable information is transmitted to NIDR.

⚠️ **Compliance Note:** Pharmacies must ensure all local backups or exports remain confidential.

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15. Continuous Quality Improvement (CQI) Cycle

Step	Description
Identify	Incident reporting or self-assessment reveals issue.
Analyze	Use analytics to explore root causes.

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Step	Description
Plan	Discuss improvement actions during CQI meeting.
Implement	Apply workflow or policy change.
Evaluate	Review outcomes via Analytics dashboard.

💡 **Tip:** Keep your CQI cycle visible in the dispensary as a reminder of ongoing learning.

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16. FAQs

Q: Can I edit a submitted incident?
A: Only drafts can be edited. Submitted records are locked to preserve integrity.

Q: How often should we hold CQI meetings?
A: Monthly or after major incidents, as per ACP guidance.

Q: Can multiple staff use PhIX at the same time?
A: Yes, each with their own login credentials.

Q: How do I export my pharmacy's analytics?
A: Open the **Analytics** module → choose **Export** → **PDF/Excel.**

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17. Technical Troubleshooting

Issue	Possible Cause	Solution
Cannot log in	Wrong email/password	Reset password
Pages not loading	Browser outdated	Update or switch to Chrome
Missing incident	Filter active	Clear filters or check drafts
Analytics not updating	Cache issue	Refresh or re-login

💡 **Tip:** Report persistent issues to PharmaSafe Support with a screenshot.

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18. Quick Reference Icons & Shortcuts

Icon	Action
	Add new record
	Edit
	Save
	Download/Export
	Calendar or date picker
	View analytics

19. Appendices

Appendix A: Glossary

- **ACP** – Alberta College of Pharmacy
- **AIMS** – Assurance and Improvement in Medication Safety
- **CQI** – Continuous Quality Improvement
- **NIDR** – National Incident Data Repository

Appendix B: Templates

Sample CQI Meeting Template

- Meeting Date / Participants
- Incidents Reviewed
- Action Items / Assigned Staff
- Follow-Up Date

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Sample Incident Report Template

- Type, Severity, Description
- Contributing Factors
- Actions Taken

Appendix C: Regulatory References

- ACP Standards for Operation of Licensed Pharmacies (SOLP)
- Standards of Practice for Pharmacists & Pharmacy Technicians (SPPPT)
- AIMS Program Requirements and Reporting Guidelines

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20. Support & Contact

For platform assistance or feedback:
PharmaSafe Support
Email: *support@pharmasafe.ca*
Response time: within 1 business day.

End of Manual

PhIX – Empowering Safer Pharmacy Practice

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