User Guide

Pharmacy Care Record

Version 16.4.3

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1 Introduction

1.1 Overview

This user guide will help you understand all functions in version 16.4.3 of the Pharmacy Care Record (PCR) application. Some screen capture images in the document show screens from previous versions of PCR, however, the functionality described is identical to that in version 16.4.3.

-

1.2 About PCR

PCR is a secure web-based application used by registered Pharmacists, pre-registered pharmacists and Pharmacy technicians to support pharmaceutical care planning in Scottish community pharmacies.

The core functions are described below.

1.2.1 Access and security

- Associating with a community pharmacy (PCRUA)
- PCR Login

1.2.2 Pharmacy context

- Home (summary totals and links to key reports)
- Search (for a patient)
- Reports (all reports with totals and links to detail)

1.2.3 Patient context

- Patient details
- Pharmaceutical care plan
    - Patient profile
    - Stage 1 medication review
    - Stage 2 medication review
    - Stage 3 medication review
    - Care issues and care issue outcomes
    - Registration information for MCR
    - Medication history (synchronise patient and medication details between the PMR and PCR)
    - View Pharmaceutical care risk assessment (historical)
- High risk medicine
    - care risk assessments for Methotrexate
    - care risk assessments for Lithium and Warfarin
    - care risk assessments for Warfarin
- New medicine interventions
- Support Tools
    - Gluten-free foods annual health check
    - Smoking cessation
- SBARs (Pharmacy communication)

1.2.4 User maintenance

- Maintain user profile
- Maintain password reset questions
- Reset password

1.2.5 Other functions

- Link to the MHRA 'Yellowcard' website (from main menu)
- Shared PCR (for health boards enabled with this function)

1.3 Additional resources

This user guide complements the following NES resource packs:

- Serial Prescribing: MCR Implementation Resource
- NES Pharmacy Gluten-free Foods Service Resource Pack

Resource pack copies are available on request from NES Pharmacy.

This user guide should be read in conjunction with section 4 of the NES Pharmacy MCR Implementation Resource Pack which describes the pharmaceutical care planning process.

For additional support in relation to completing a stage 3 medication review, please refer to the polypharmacy guidance for healthcare professional website and mobile app.

1.4 Creating test patients

Test patients can be created to support PCR training activities. Test patients must only be created using one of the following CHI numbers:

- 5555555555
- 7777777777
- 9999999999

All PCR users can create test patients with these CHI numbers. Test patients will only be visible for the pharmacy where they are currently associated.

Using these CHI numbers will ensure that test patients can be easily identified and are excluded from any relevant processing and reporting.

It is important to ensure that test patients do not resemble real patients. To assist with this, suggested patient names are listed in "[Appendix C] Example test patients". The pharmacy address can be used to complete the demographic data for each test patient.

Note: *Test patients must not be added to the PMR. The PMR to PCR interface will not work with test CHI numbers.*

1.5 User guide structure

1.5.1 Section 1: Introduction

Contains information about this user guide, the PCR application, what's new in the latest version, additional resources, and creating test patients

1.5.2 Section 2: Access and security

Describes the security arrangements for PCR and use of the 'associate' function to determine your pharmacy and login to PCR.

1.5.3 Section 3: High-level menu

Explains the links on the high-level menu with more detailed guidance on some functions elsewhere in the document.

1.5.4 Section 4: Pharmacy Home

The Pharmacy home pages displays a high-level summary of patients within the pharmacy

1.5.5 Section 5: Search for and create patient records

Detailed guidance on how to create and search for patient records on PCR.

1.5.6 Section 6: Pharmaceutical care plan (PCP)

Create and maintain pharmaceutical care plans for patients including the creation and maintenance of patient profile information, stage 1 medication reviews, stage 2 medication reviews, stage 3 medication reviews, care issues, and care issue outcomes.

1.5.7 Section 7: High risk medicine care risk assessments

Create and maintain high risk medicine care risk assessments and associate care issues and care issue outcomes to a high-risk medicine care risk assessment.

1.5.8 Section 8: New medicine interventions

Create and maintain new medicine interventions and associated care issues and care issue outcomes.

1.5.9 Section 9: Gluten-free foods annual health check (support tool)

Create and maintain Gluten-free foods annual health check and associated, outcomes, care issues and care issue outcomes.

1.5.10 Section 10: Smoking cessation (support tool)

Create and maintain Gluten-free foods annual health check and associated, outcomes, care issues and care issue outcomes.

1.5.11 Section 11: SBAR (Pharmacy communication)

Create and maintain SBARs. Generate SBAR as PDF. Add replies to SBAR.

1.5.12 Section 12: Reports

This section includes details of all reports accessible from the report summary page. These include

- Patient report for pharmacy
- Outstanding care issues
- All SBARs for pharmacy
- Core service registrations reports for ‘MCR’
- Stage 1 medication reviews
- Stage 2 medication reviews
- Stage 3 medication reviews
- Open care issues
- New medicine interventions support tool
- Gluten-free reports
- High risk medicine assessments support tool
- Smoking cessation support tool

1.5.13 Section 13: PMR interface to PCR

Understand the relationship between PCR and the Patient Medication Record (PMR) application

1.5.14 Section 14: Shared PCR

Details of the Shared PCR function that is enabled for some health boards.

1.5.15 Section 15: Appendix A: Error Messages

Full list of application error codes and their meaning

1.5.16 Section 16: Appendix B: Create PCR shortcut on desktop

Create a shortcut to PCR on your desktop if one doesn't exist.

1.5.17 Section 17: Appendix C: Common issues with PCR association

Explains some of the common issues with the PCR association process.

1.5.18 Section 18: Appendix D: Example test patients

Three example test patients.

1.5.19 Section 19: Appendix E: Unable to access the PCR association function form a computer without an ePharmacy certificate

Help with procedure to add the PCR Association website to your list of trusted websites

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2 Access and security

2.1 Overview

Access and security protocols in PCR are built around these key principles:

- Access is only allowed from Scottish community pharmacies via an independent community pharmacy SWAN connection or an authorised corporate network with an approved SWAN gateway.
- Access to PCR is limited to practising registered Pharmacists and Pharmacy Technicians who work in Scottish community pharmacies.
- All Pharmacists and Pharmacy Technicians who practice in Scottish community pharmacies have an individual User ID and password to access PCR.
- A Pharmacist or Pharmacy Technician can only access PCR records for the patients of the community pharmacy where they are currently working.
- All attempts to access, update, and view PCR patient records are audited.

2.2 User Role

PCR supports user roles for “Pharmacist” and “Pharmacy Technician”. The user role is set when the user account is created. Users with the Pharmacist role or Pharmacy Technician role can access all PCR functionality.

2.3 User ID and password

All practising Pharmacists and Pharmacy Technicians in Scotland who work in a community pharmacy and require access to PCR will need a PCR User ID and password. Each Health Board is responsible for identifying PCR users and distributing their User IDs and passwords.

2.3.1 Determining your User ID

A PCR user ID varies based on when the user was initially provided with access to PCR:

Date received access to PCR	**User ID**
Prior to and including 5th October 2010	RPSGB membership number
On or after 1st February 2011	GPhC registration number
After 5th October 2010 but before 1st February 2011	GPhC registration number; or RPSGB membership number

2.4 Change password on initial login

On first login to PCR the password must be changed using the update password page (Figure 2-1). The system automatically displays this page on initial login.

Figure 2-1: Update password page

Note: *A user's initial password will have been delivered using secure stationery that is like those used by banks for the distribution of PIN letters for debit or credit cards.*

To change password on initial login:

- Tear off the secure slip at the bottom of the password letter and place it on a light background. The password can then be read from the tear-off slip.
- Re-enter User ID and initial password and then enter a new password on the update password page (Figure 2-1)
- Click the "Change Password" button (Figure 2-1)

If the password change is successful, the system displays the "Search criteria" page.

Note: *A password must be a minimum of 8 characters and include at least one digit, one non-alphanumeric character (e.g. '&', '*', etc.), one uppercase character and one lowercase character.*

A password must be different to any of the 12 previously used passwords.

Passwords will expire every 60 days; the system will prompt to change password on expiry.

A password can be changed at any time by selecting the 'Change Password' option on the high-level PCR Menu (See section).

User IDs and passwords must only be used by the person that they were distributed to and must be kept secure. All access to PCR (login, viewing and updating of patient records) is audited and patterns of inappropriate use are investigated.

Note: *Any queries regarding passwords or User IDs should be directed to the ePharmacy helpdesk –* ***01312756600.***

2.5 Associating with a community pharmacy

A user can only access patient records relating to the pharmacy where they are currently working. A user must "associate" with the pharmacy where they are working when they begin work in their usual or a different pharmacy – usually each morning.

In most pharmacies, the association process can only be performed on the main 'server' computer in the pharmacy, however, some large multiple pharmacies may allow the association process from any computer in the pharmacy.

The main server computer is usually the one where the ePharmacy Certificate Management Application is installed and the ePharmacy Client Certificate resides (except Lloyds pharmacy).

The association process makes use of the ePharmacy Certificate in one of the checks to ensure that the user is in the pharmacy that they are currently requesting to be associated with.

Note: *Association only needs to be performed once a day or when moving to a different pharmacy – where a user has already associated with another pharmacy that day.*

The PCR association page includes 'Message of the Day' text. This is used to display messages that relate to planned downtime on either PCR or the ePharmacy Message Store (EPMS). It is also used to display information about new functionality releases on PCR.

Note: *Some pharmacies use an alternate method of user association. This is done using the new PCRUA Windows Client application. For users using this tool, please skip the section 2.5.1 and follow the instructions mentioned in Section 21 [Appendix F] to associate with the community pharmacy.*

2.5.1 Associate with a pharmacy

Step 1 – Navigate to website and accept first security alert:

- Navigate to the PCR association website: https://pcrua.mhs.scot.nhs.uk
- In the "Security Alert" dialogue box Select "Yes" to allow the website to gain access to the digital certificate (Figure 2-2).

Figure 2-2: PCR association first security alert

Step 2 – Enter user credentials:

- Enter PCR User ID, Password and contractor code and select the “Associate User” button (Figure 2-3)

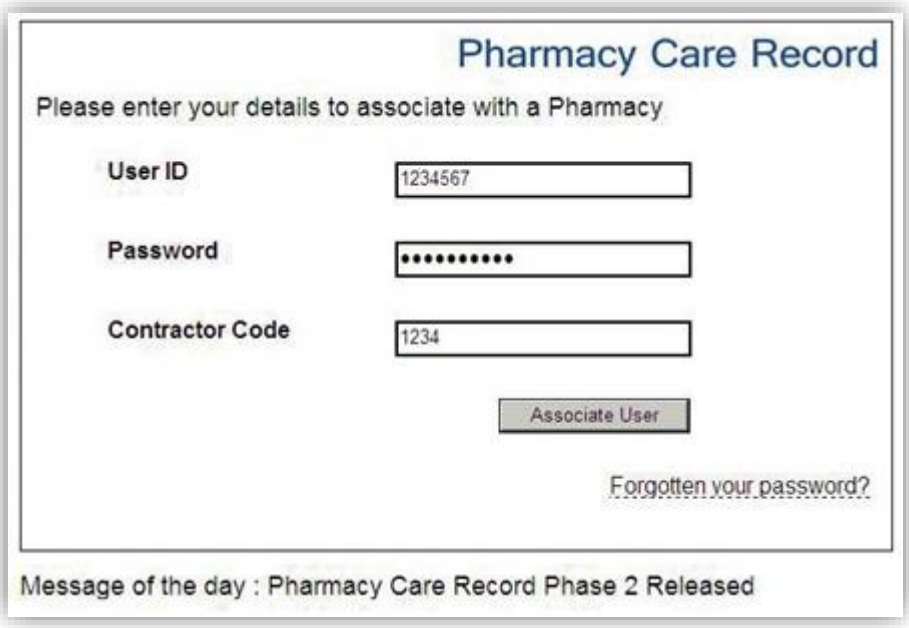


Figure 2-3: Associate User

Step 3: Accept second security alert

- In the “Security Alert” dialogue box, click “Yes” to accept the final security certificate (Figure 2-4)

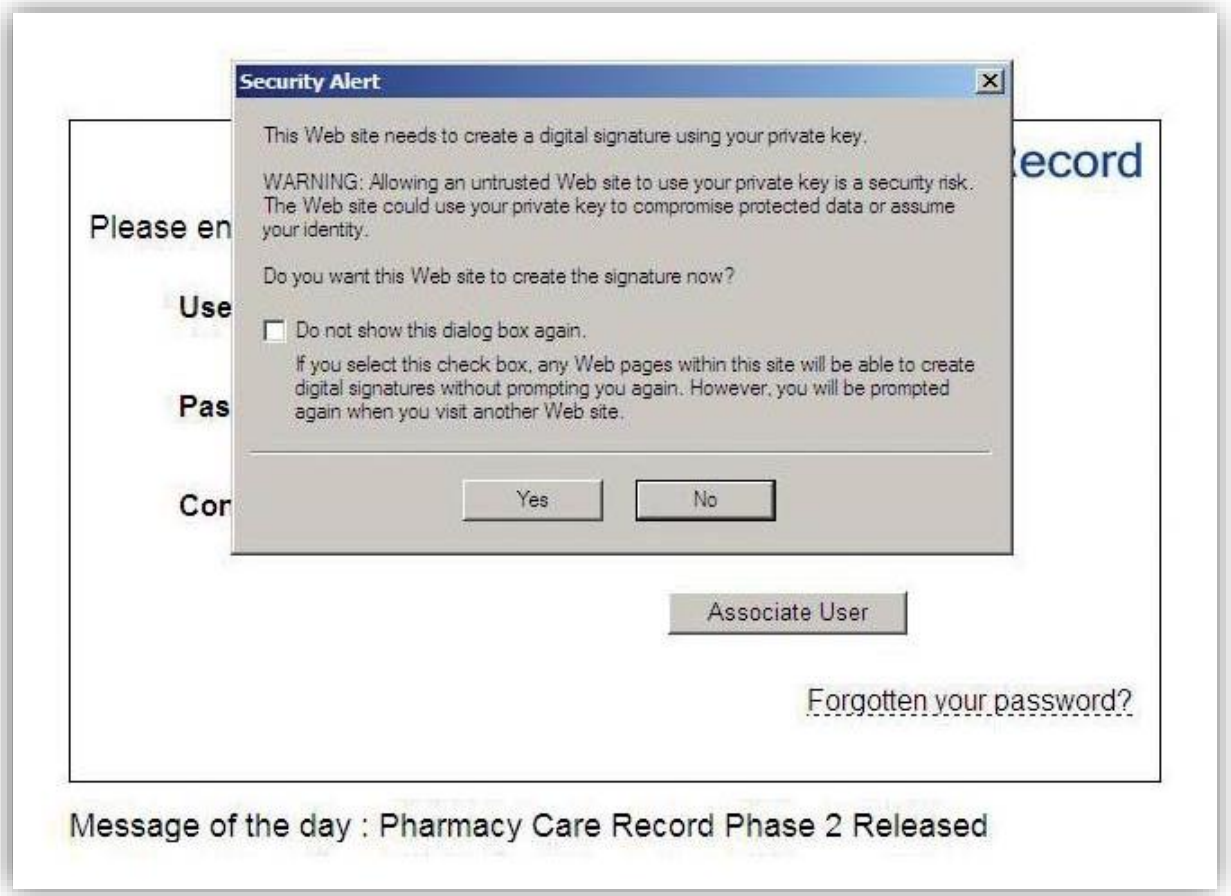


Figure 2-4: Association final security certificate

Note: *The “Security Alert” dialogue box is displayed because the ePharmacy Certificate is being used to digitally sign a message and send this to the PCR server as part of the security check for the association process.*

Step 4: Check that association has been successful

If the association is successful, the following a message will be displayed in green text (Figure 2-5).

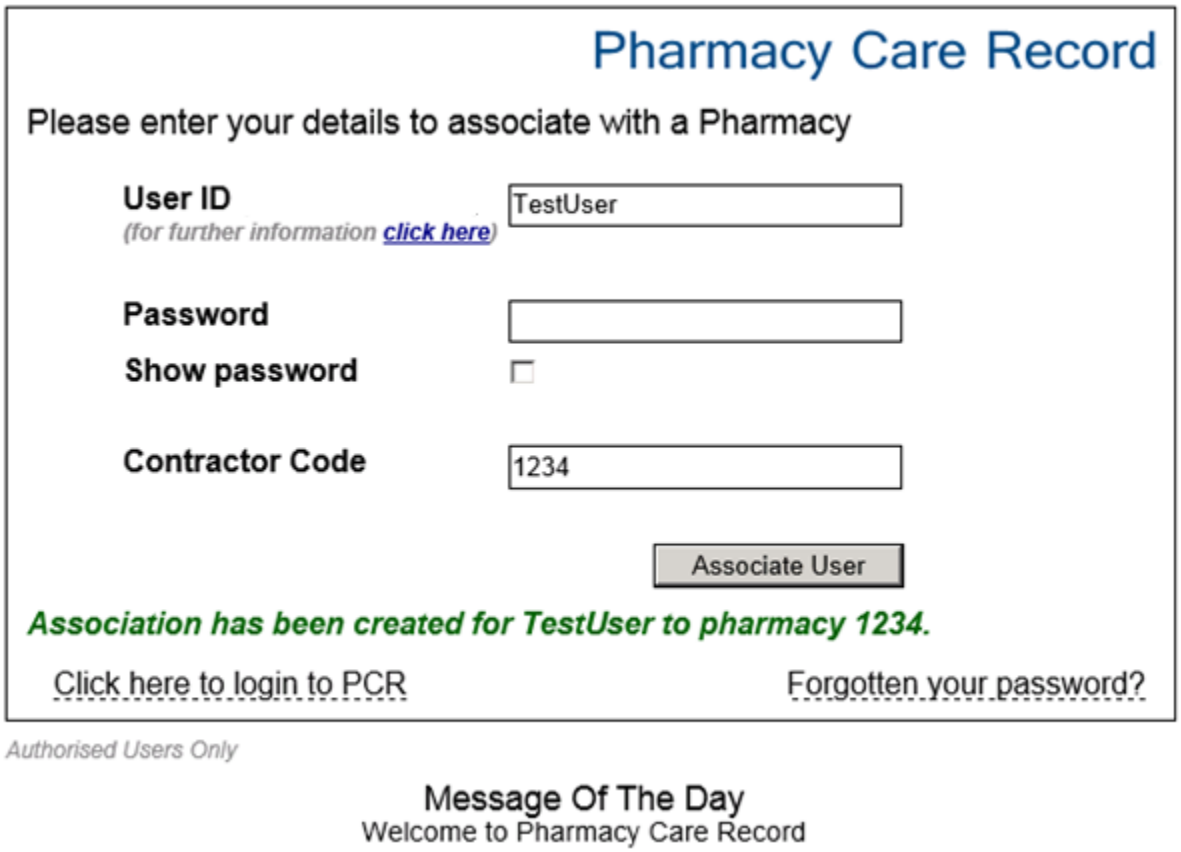


Figure 2-5: Association successful

At this stage, only association with a pharmacy is complete. A further step is required to login to the main PCR application to access patient records. A “Click here to log in to PCR” link is shown after successful association. Use this link to navigate to the PCR login page.

2.5.2 After successful association

On successful association, the system will prompt to change password if a new PCR user and associating for the first time or the password has expired.

Follow the procedure in section 3.2.5 to change the password. When the password has been changed the association page will be re-displayed and the association process will require to be repeated from step 2 “enter user credentials”.

2.6 PCR Login process

2.6.1 Accessing PCR from a computer

Once associated to a pharmacy, PCR can be accessed in the following ways:

- By following the link on the association page, Figure 2-5
- From a desktop shortcut on any PC in the pharmacy where you are working.
- Via the following URL: https://pcr.mhs.scot.nhs.uk/

2.6.2 Login to PCR

To login to PCR

- Go to the Login page (Figure 2-6)
- Enter User ID and Password
- Click the “Login” button

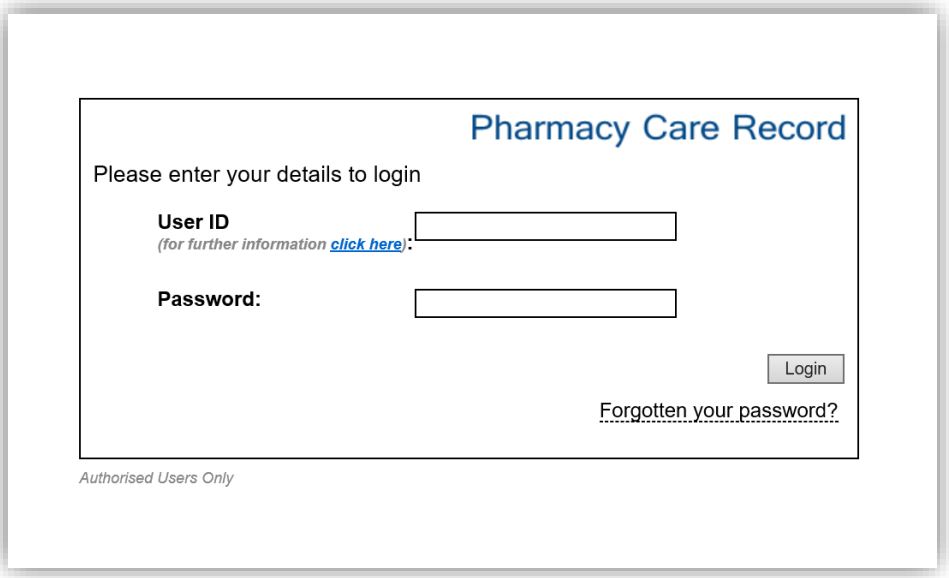


Figure 2-6: Login page

- System displays the default landing page: either the “Search criteria” screen (Figure 2-7) or the “Pharmacy Home” page.

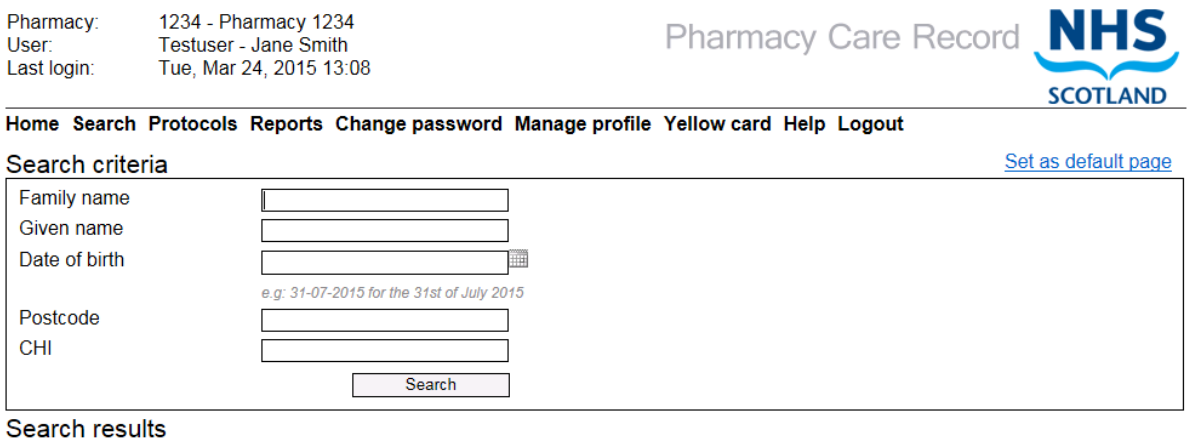


Figure 2-7: "Search criteria" page

Note: *On the "Search criteria" page, Family name = surname; Given name = first name.*

All date fields in PCR have a date picker function (As shown for date of birth field (above)

2.6.3 Common information and functions on all PCR pages

The heading at the top of the "Search criteria" page is consistent across all PCR pages and displays the details of the current user, the contractor code and the name of the pharmacy the current user is associated with.

The high-level menu is displayed below the heading and is also displayed on each page. The high-level menu allows you to quickly move between the different functions within PCR. The

High-level menu functions are detailed in Section 3.

Login failure

If the login has failed, then the reason for failure will be displayed in **bold red text** (*Figure 2-8)*. Examples of reasons for login failure include: incorrect password, incorrect User ID or no association for the user.

Figure 2-8: Login failure example

You must associate with a pharmacy before you can continue with the PCR login process.

2.6.4 Alternative login scenarios

2.6.4.1 First time Login

If you are logging in to PCR for the first time the change password screen will display instead of the default landing page “Search criteria” or “Home” page. In this case, see “Changing your password on initial login” section.

2.6.4.2 Login from PMR application

Some pharmacy Patient Medication Record (PMR) systems can directly link to a patient’s PCR record from within the PMR. If logging in from within the PMR application the “Search criteria” screen will not be displayed. Further information on PCR integration with PMRs is detailed in section 8 of this guide.

2.6.4.3 Login after system timeout

When the automatic session timeout is triggered the screen will lock, Figure 2-9.

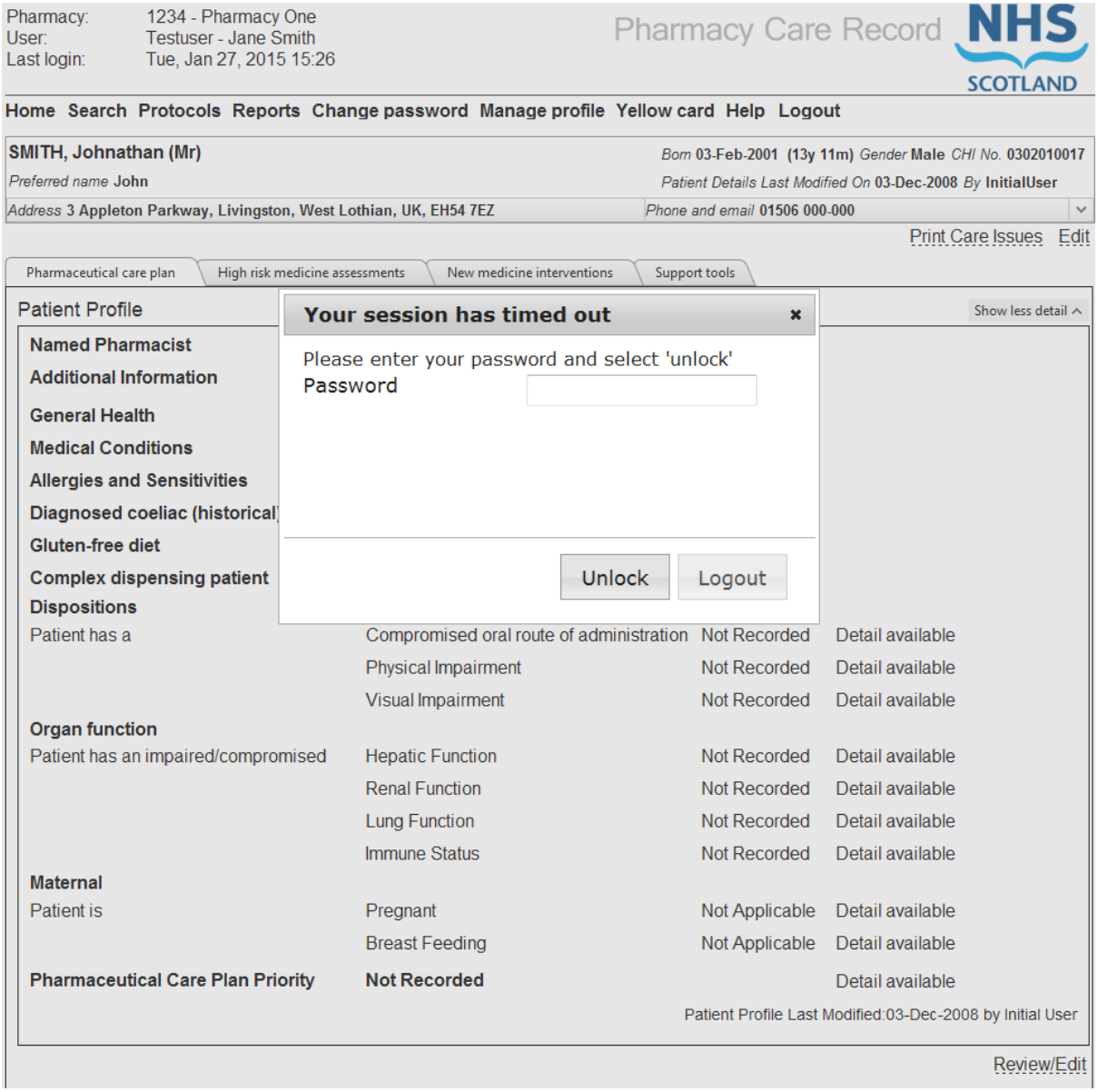


Figure 2-9: Lock screen

To Unlock the screen:

- Enter password
- Select “Unlock”

Only the previously logged in user can log back in from the lock screen. If another user attempts to log in or the password is incorrect an error will be displayed, Figure 2-10.

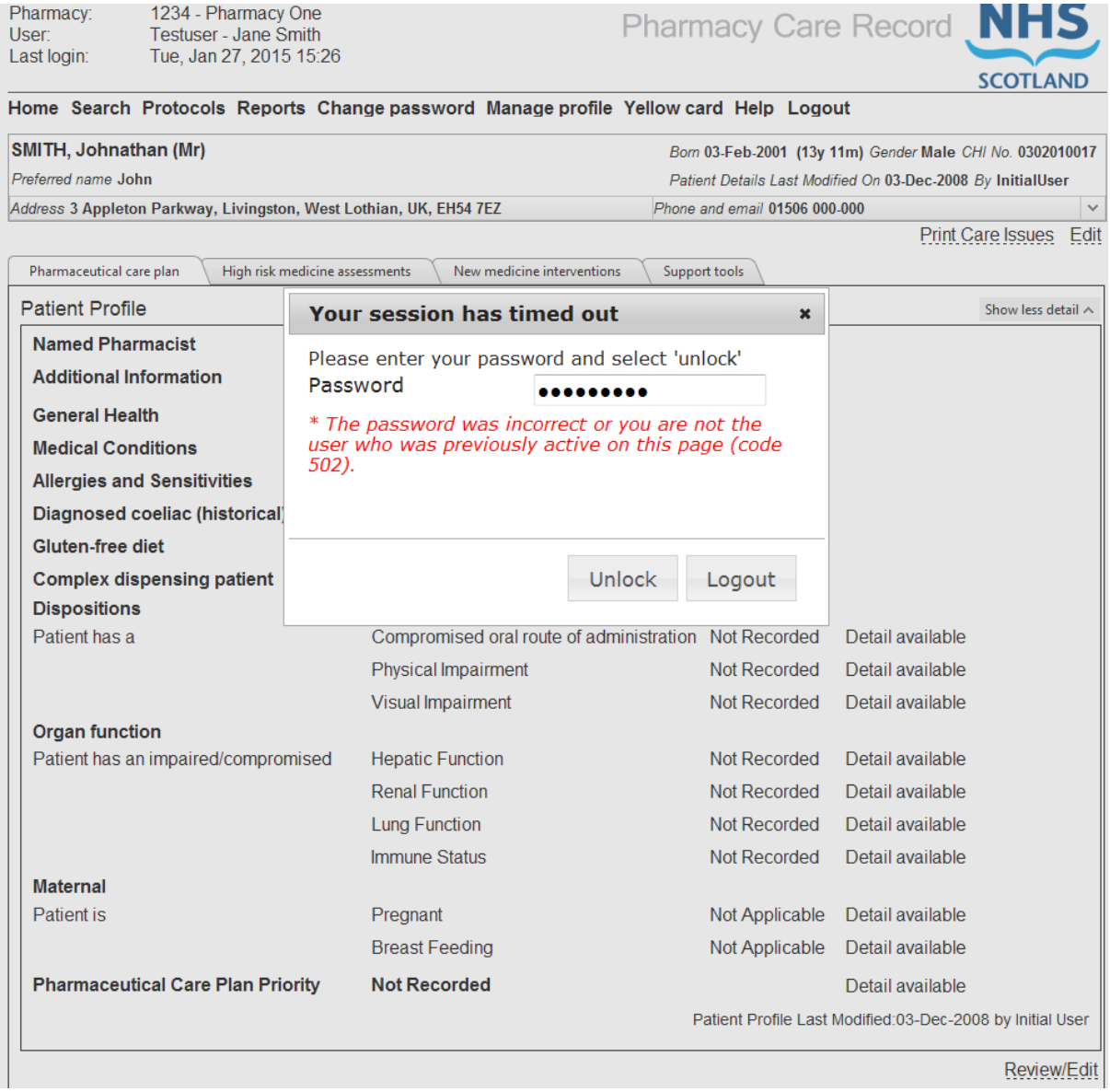


Figure 2-10: Lock screen error

To logout from the lock screen:

- Select “Logout”
- The login screen will be displayed

2.7 Technical environment

2.7.1 Accessing PCR

PCR has been tested for compatibility with Internet Explorer 8 and 11. It has also been tested on mobile devices with recent iOS and Android versions.

PCR can be accessed from any computer or mobile device within a Scottish community pharmacy that is connected to the SWAN network (either directly or indirectly via an approved corporate network).

2.7.2 Saving changes in PCR

In PCR changes made must be saved by clicking the 'Save' (or equivalent) button on each page. If a browser window is closed the system will not prompt for changes to be saved. It will just close and any changes made will be lost.

2.8 Maintain reset password questions

The purpose of this feature is to securely reset a password, without the need to contact the ePharmacy helpdesk. This is achieved by recording answers to security questions such as:

- "What primary school did you attend?";
- "What was the name of your first pet?"; or
- "Name an author that you enjoy?".

Step 1 – Navigate to 'Manage Profile' page:

- Login to PCR
- Select "Manage profile" from the high-level menu (the system will display the "Manage profile" page

Step 2 – Navigate to "Manage Reset Password Questions" page:

- Select "Manage my reset password questions" link from the "Manage profile" page *(*Figure 2-11)

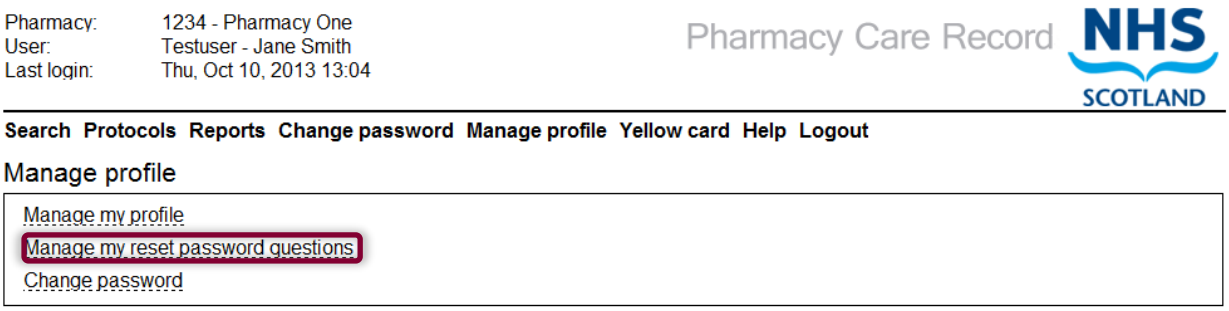


Figure 2-11: "Manage my reset password questions" link

Step 3 – Select a question to answer:

- Select a question to answer from the "Question" drop down list on the "*manage my reset password questions*" page (Figure 2-12)

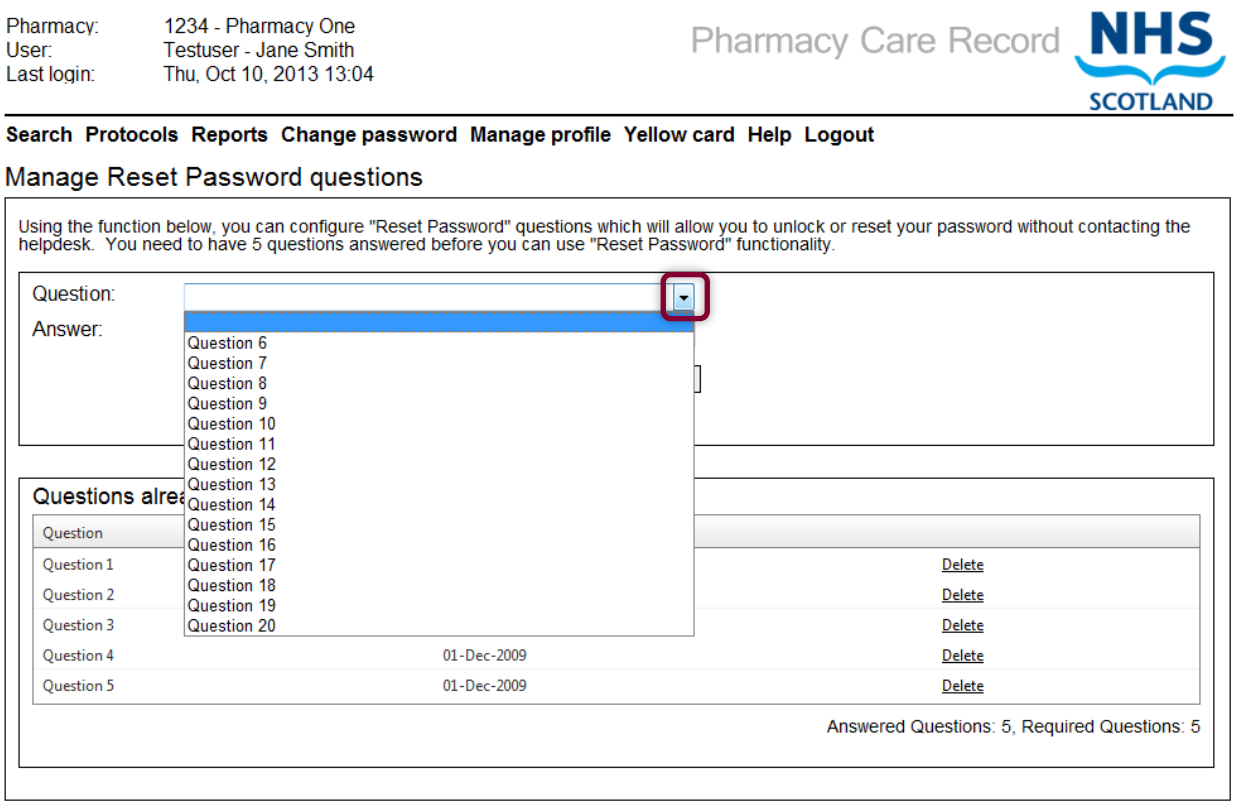


Figure 2-12: "Manage reset password questions" page

Note: *Only choose questions that are likely to be memorable. Avoid questions that may have multiple answers or where the answer may change on a regular basis.*

Step 4 – Type your answer and click “Add Answer” button:

- Type a relevant answer to the selected question in the “Answer” single line text box *(figure 1-3)*
- Click the “Add answer” button (Figure 2-13)

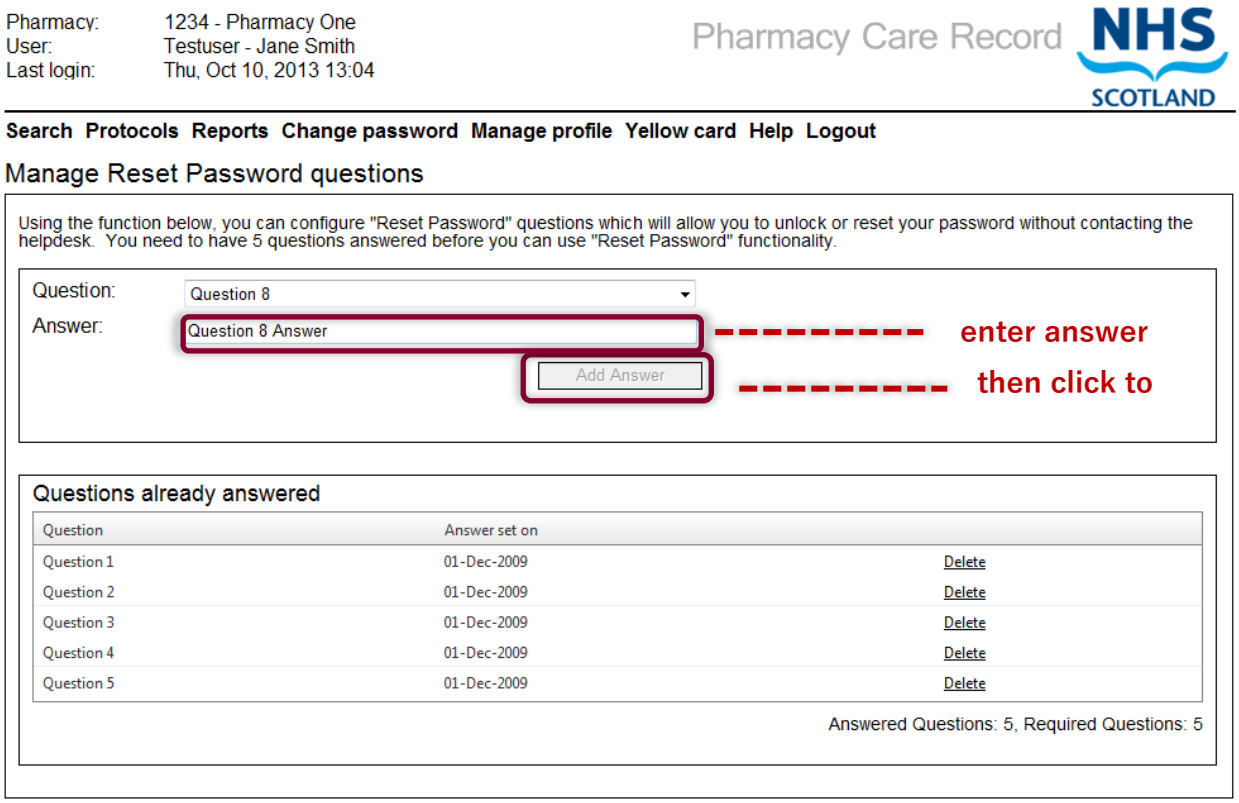


Figure 2-13: Answer text box and add answer button

Step 5 – Answer additional questions:

- Repeat **Step 4** until you have answered the required number of questions (currently set at five questions).

2.9 Change or remove questions

Password reset questions cannot be edited. To change an answer to a question, remove the question first and then re-add it with your new password.

To change or remove questions:

- Within the Manage Reset Password questions page, click Delete on the question you want to change or remove (Figure 2-14)

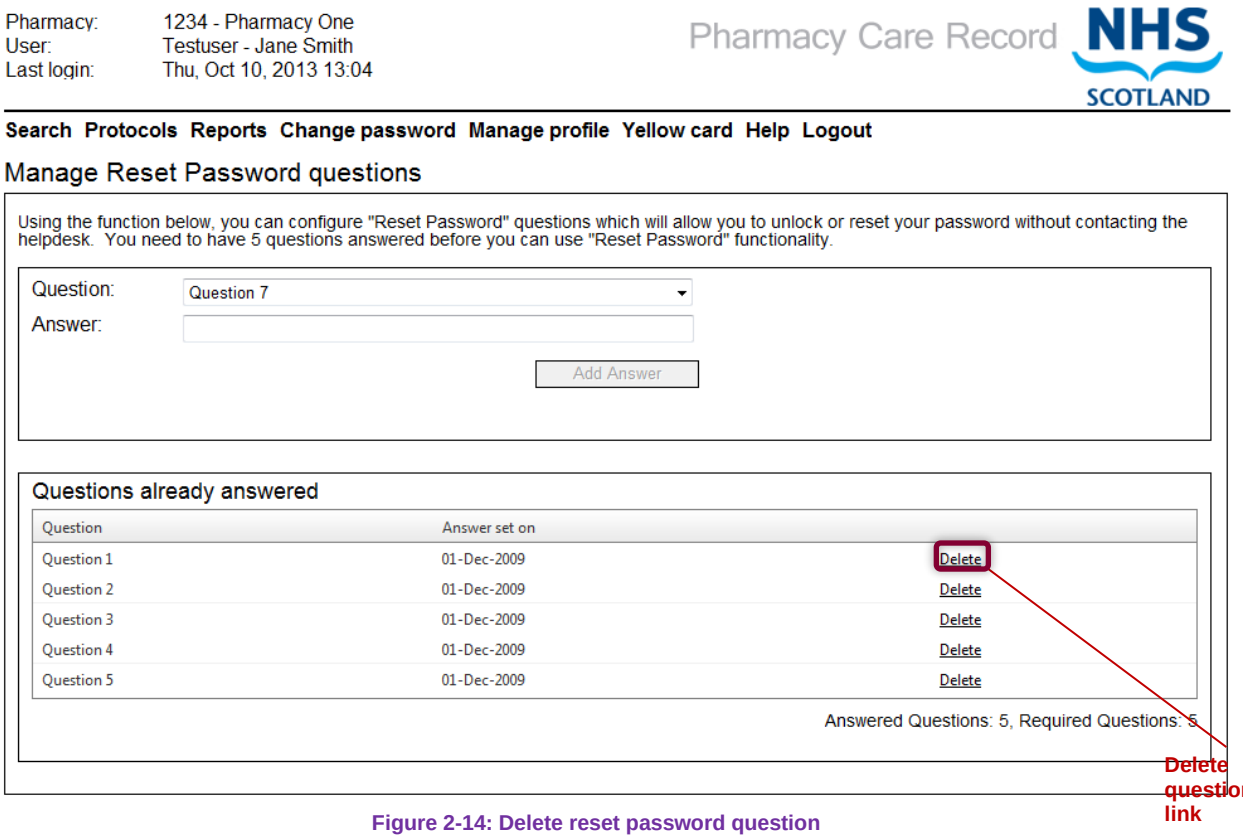


Figure 2-14: Delete reset password question

2.10 Reset password

Use the reset password process to change your password where a password has been forgotten and a sufficient number of reset password questions have been set.

Step 1 – Click "forgotten your password?" link:

- Select the "Forgotten your password?" link on the PCRUA or PCR login screen (Figure 2-15)

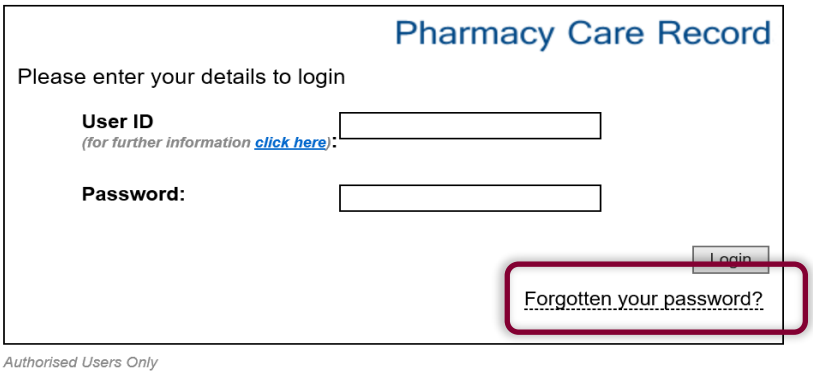


Figure 2-15 "forgotten your password" link

Step 2 – Enter user details:

- Enter User ID and click the "Start" button (Figure 2-16)

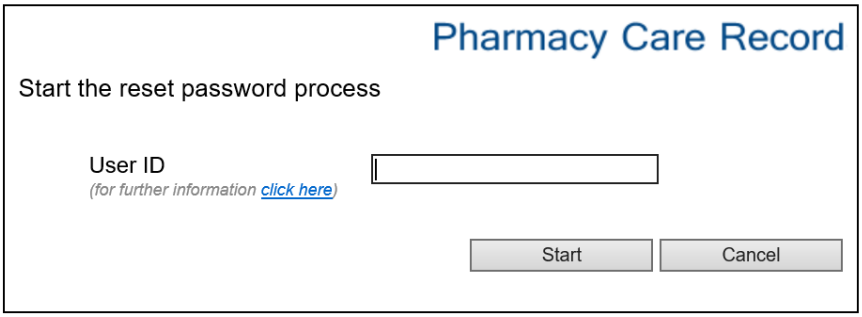


Figure 2-16: Start the reset password process

Step 3 – Start the reset password process:

- Select "Yes" to continue and remove any associations [Selecting "No" will return to the login page] (Figure 2-17)

Note: *Selecting the "Yes" button will remove an existing association and mandate the need to re-associate (See section 2.5).*

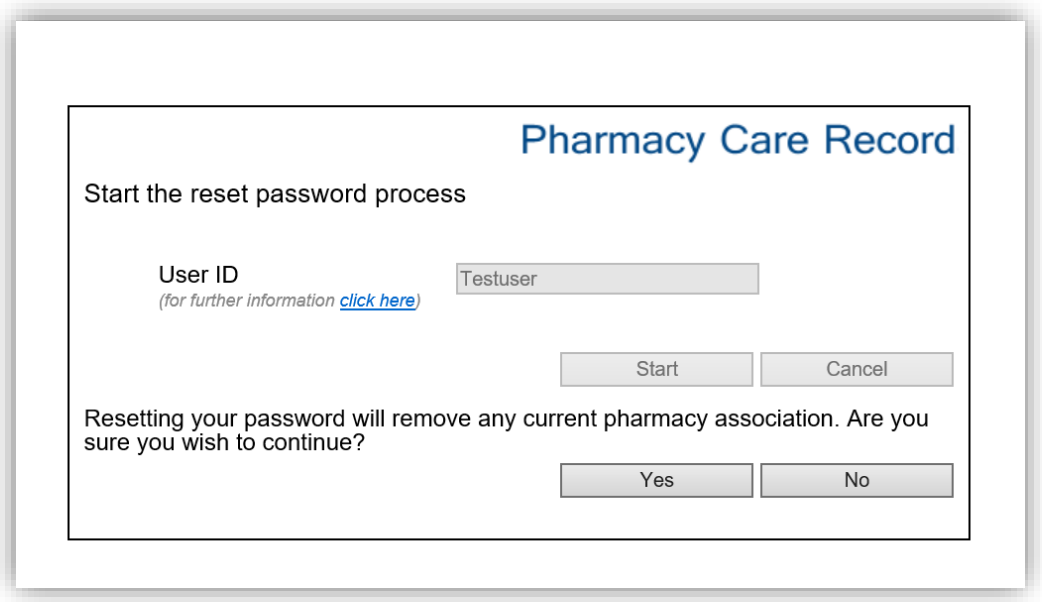


Figure 2-17: Confirm continue and remove any associations

Step 4 – Answer password reset questions:

The system will prompt to provide answers to a sample of questions that have already been configured for the password reset process. (Figure 2-18).

- Type question answer in the single line text box and click the “Answer Question” button.

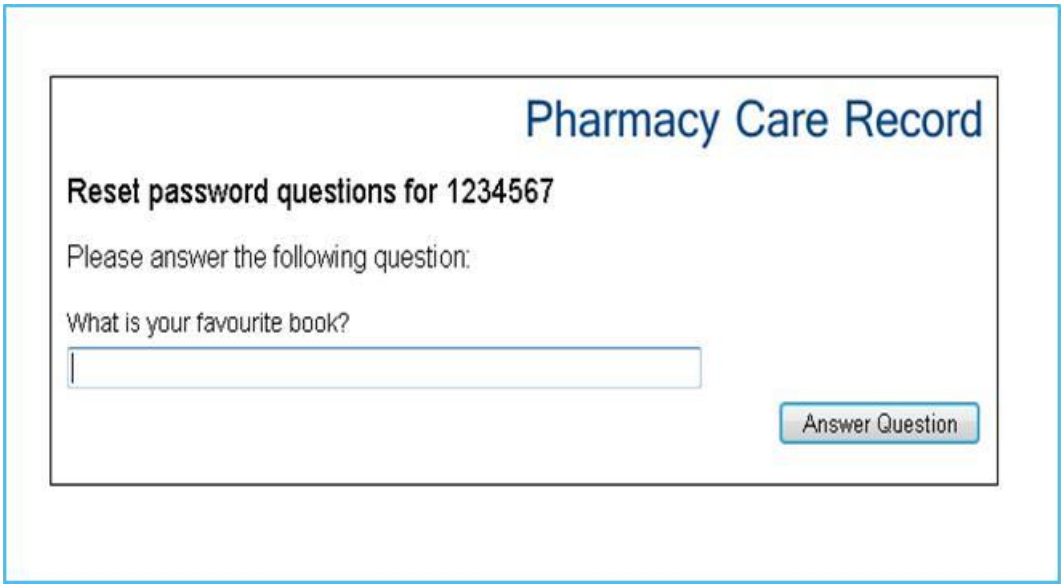


Figure 2-18: Enter answer to reset password question

Step 5: Set password:

Having successfully answered a sufficient number of reset password questions a new password can be set.

- Enter new password into the “New password” box and the “Confirm password” box and click the “Set Password” button to change your password (Figure 2-19)

Figure 2-19: Set password

Note: *The new password must meet the minimum security standard of 8 characters including at least one digit, one non-alphanumeric character (e.g. ‘&’,’*’, etc.), one uppercase letter and one lowercase letter. If the password entered is the same as any 12 previously used passwords the system will require you to enter a different password.*

You can either change your password to a new one or simply start using a forgotten password that you have later remembered. Entering the reset password process does not force you to change your password if you then remember your current password.

2.11 Expiring Password Warning

On login to PCR there is a warning on the main menu to highlight that the password is due to expire shortly.

Fourteen days prior to when a password is due to expire the “Change password” menu item will be highlighted in yellow.

Hovering the cursor over the “Change password” menu item will display the number of days before the password is due to expire.

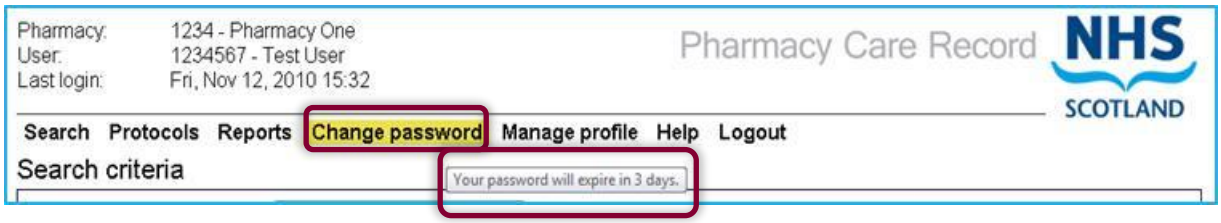


Figure 2-20: Expiring password warning

2.12 Last login date and time

For security, the last login date and time is displayed in PCR (Figure 2-21)

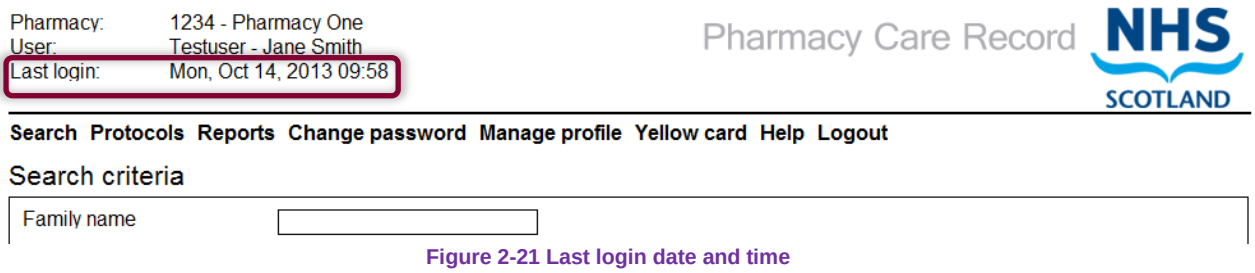


Figure 2-21 Last login date and time

Note: *Please, inform the ePharmacy helpdesk by phone (0131 275 6600) or email (nss.psdhelp@nhs.scot) with any concern that your account is being used by someone else.*

3 High-level menu functions

3.1 Overview

The PCR high-level menu contains links to other PCR functions (Figure 3-1). These links are not patient specific but give access to pharmacy-wide functions.

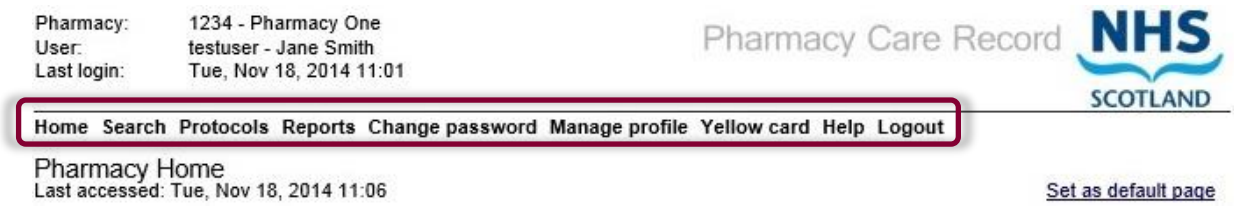


Figure 3-1: PCR high level menu

Note: *Selecting any high-level menu option will immediately open the relevant PCR page. Any unsaved changes made in a previous screen will be lost.*

3.2 Menu functions

3.2.1 Home

The “Home” menu displays the “Pharmacy Home” page, Figure 3-2.The Pharmacy Home page displays summary information about patients in the associated pharmacy with links to more detailed information.

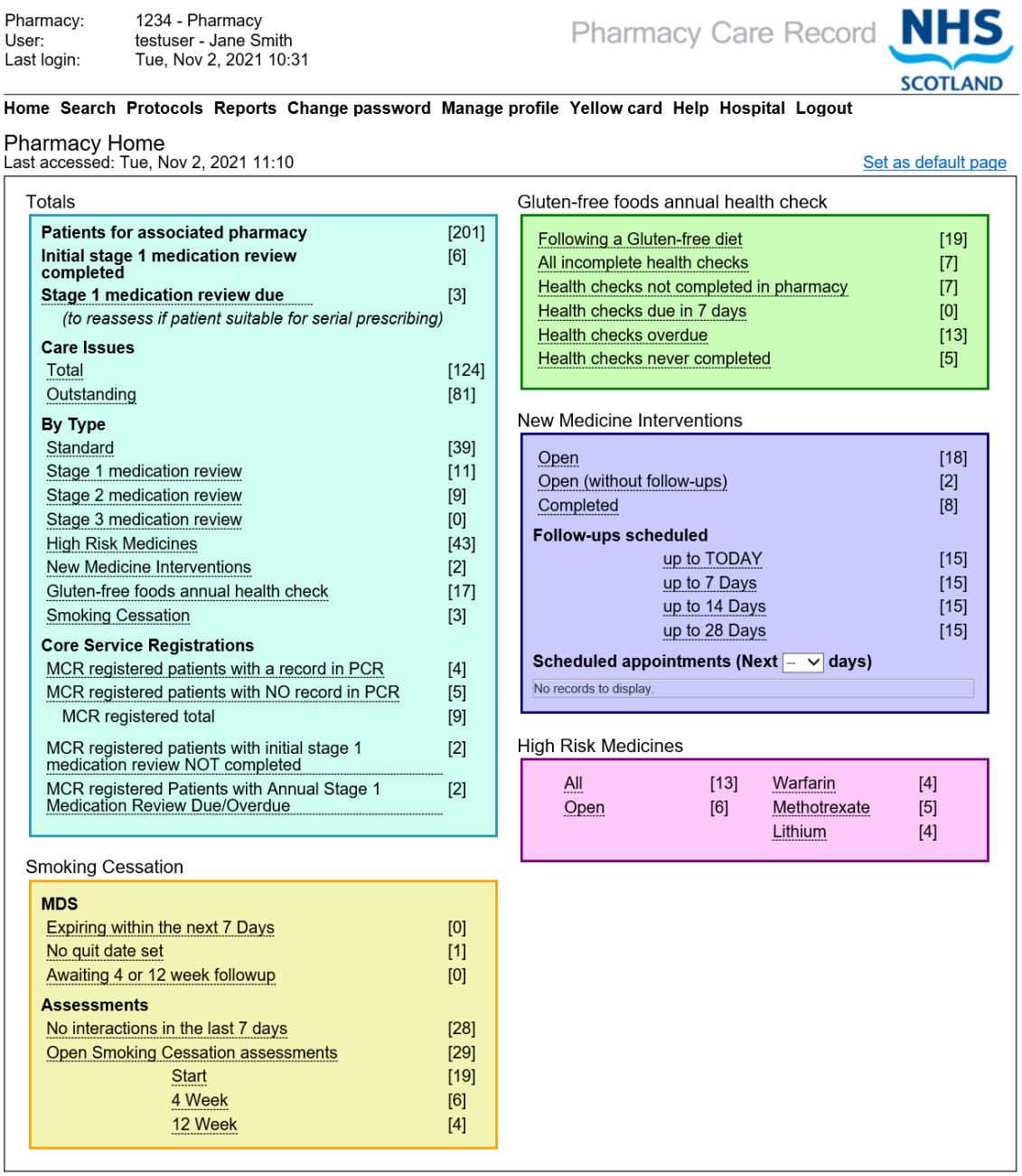


Figure 3-2: Pharmacy Home

A full description of information and functions on the Pharmacy home page is described in section 4.

3.2.2 Search

Selecting the “Search” menu will display the “Search criteria” page (Figure 3-4)

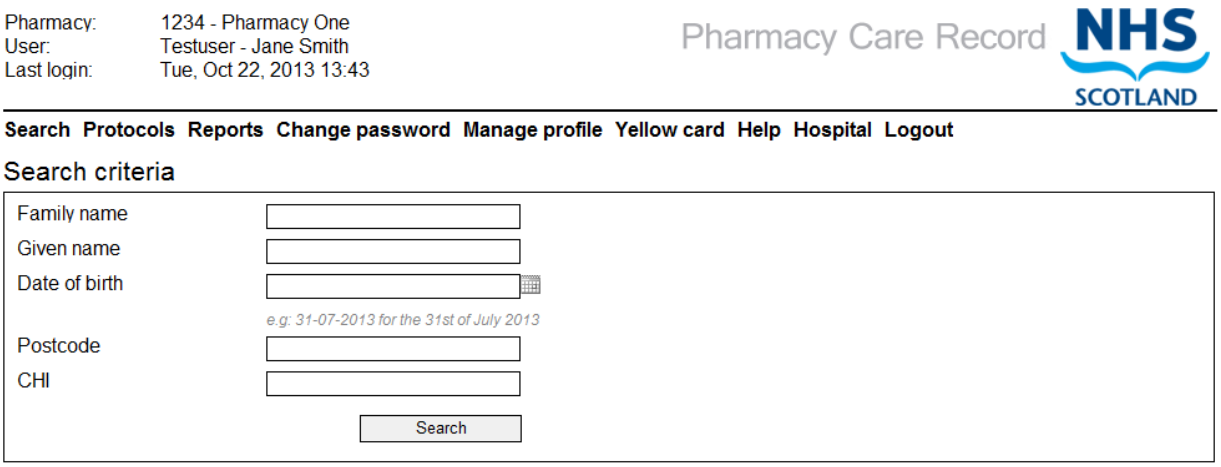


Figure 3-3: Search criteria page

Full guidance on using the search function is covered in section 5.

3.2.3 Protocols

The “Protocols” menu is intended to be used to list the MCR disease protocols (Figure 3-5: Protocols.). However, at present there are no protocols available in PCR.

Figure 3-4: Protocols

3.2.4 Reports

Select the “Reports” menu to view a list of reports available to the user. Reports are explained in section 12 of this guide.

Figure 3-5: Reports Page

3.2.5 Change password

Selecting this function will display the change password page (Figure 3-7).

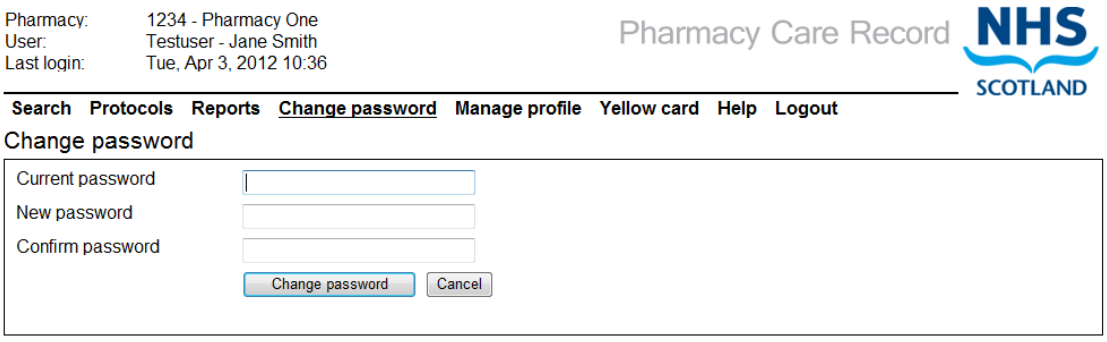


Figure 3-6: Change password page

The change password function can be used at any time.

3.2.6 Manage profile

Use this function to access links to manage details relating to the user's profile, password reset questions and a link to the change password functionality (Figure 3-8).

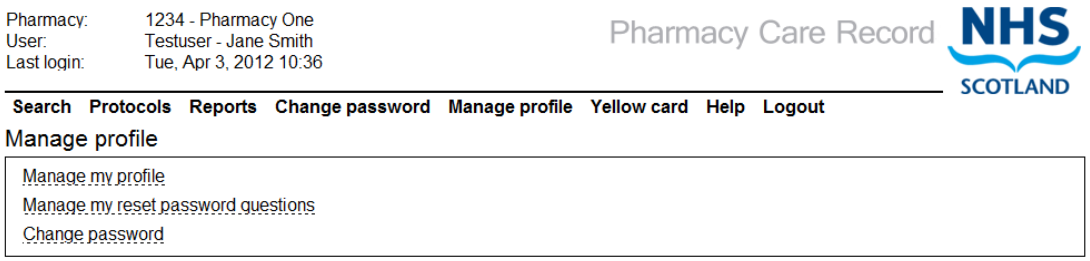


Figure 3-7: available options on "Manage profile" page

Pharmacists can now change the details held about them in the PCR system (such as their name, email address and how their name is displayed in PCR).

Step 1 – Access the manage profile page:

- Login to PCR
- Select Manage Profile from the main menu
- The system will display the Manage Profile Page.
- Select the "Manage my profile" link (Figure 3-9)

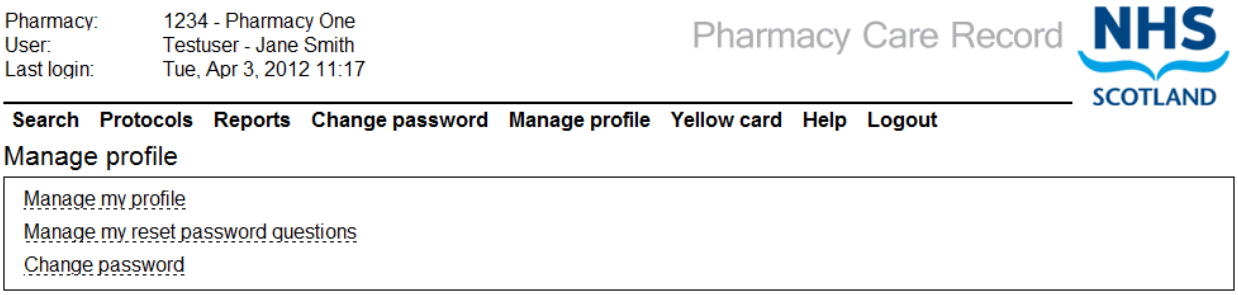


Figure 3-8: Manage profile options

Step 2 – edit profile details:

- The Pharmacist Profile page will now be displayed (Figure 3-10)

User options:

- Change details as appropriate and select Save – details will be saved in PCR
- Select "Cancel" to exit without saving changes

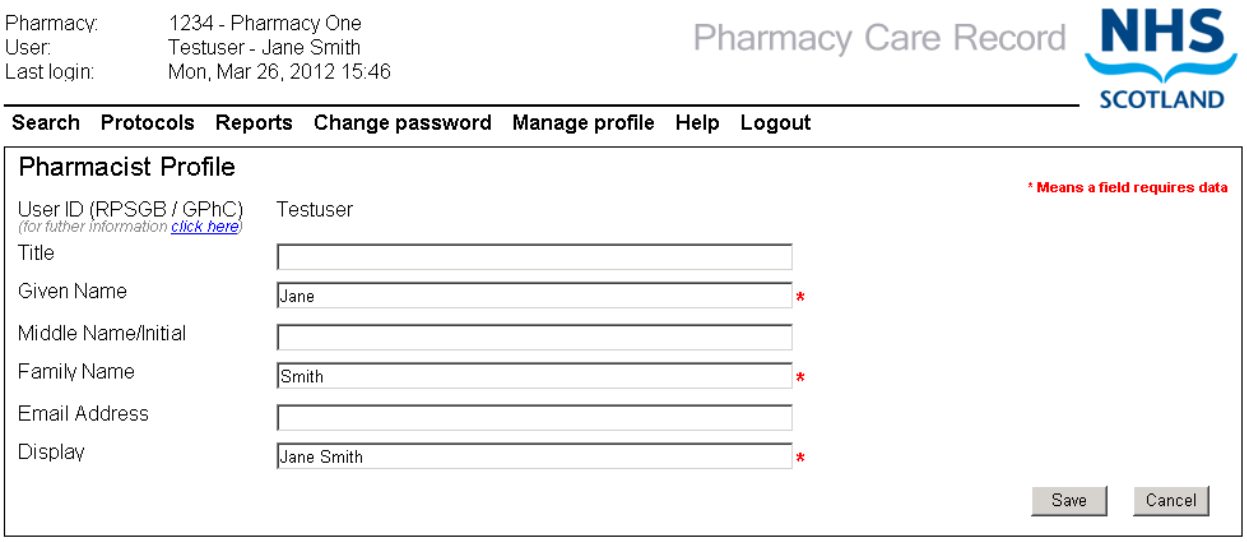


Figure 3-9: Pharmacist profile

Note: *Given Name, Family Name and Display are mandatory.*

For more details on the other options on the Manage profile page see:

- Maintain reset password questions, section 2.8

3.2.8 Yellow Card

Select “Yellow Card” to open a link in a new browser window (or tab) to “http://yellowcard.mhra.gov.uk/”

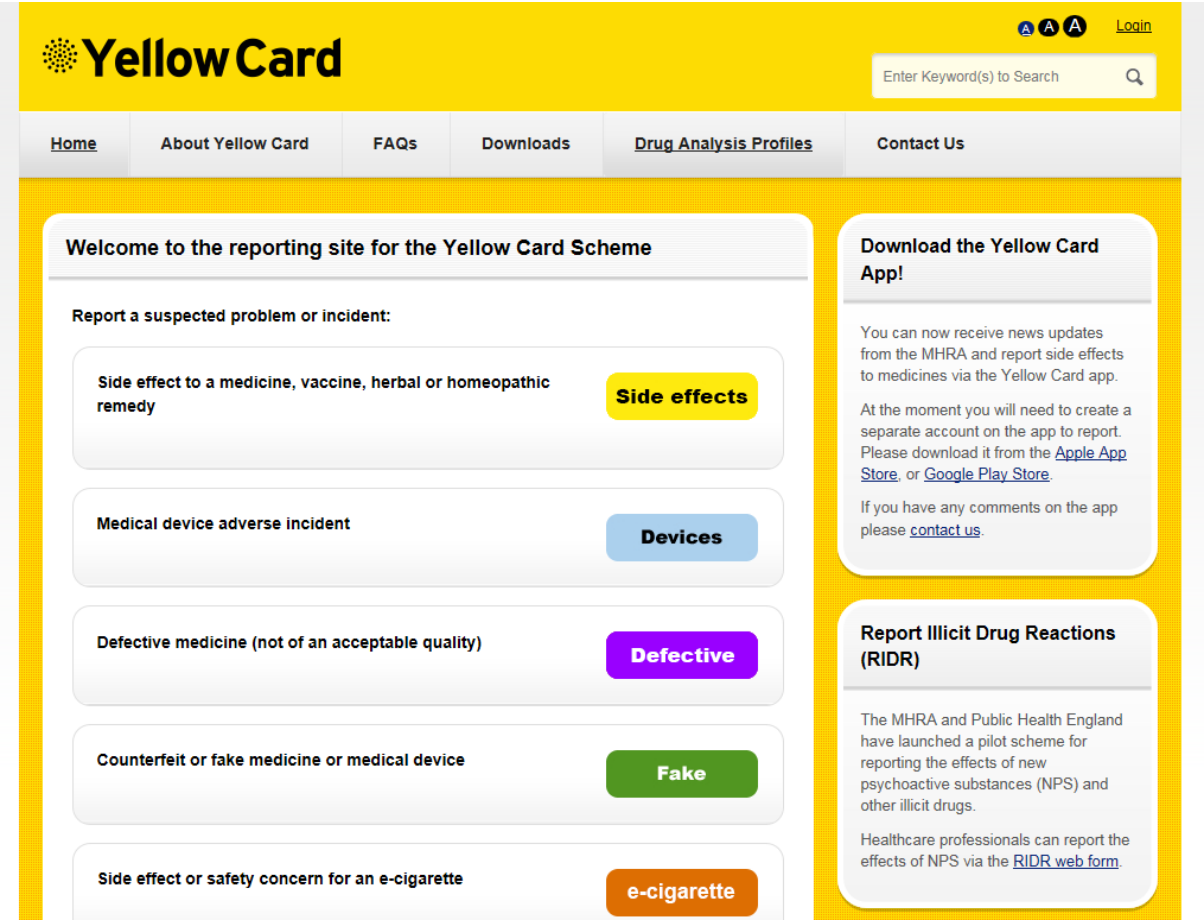


Figure 3-10: MHRA YellowCard website

3.2.9 Help

Select this option to view help related information that includes support contact details and a link to this user guide (Figure 3-12).

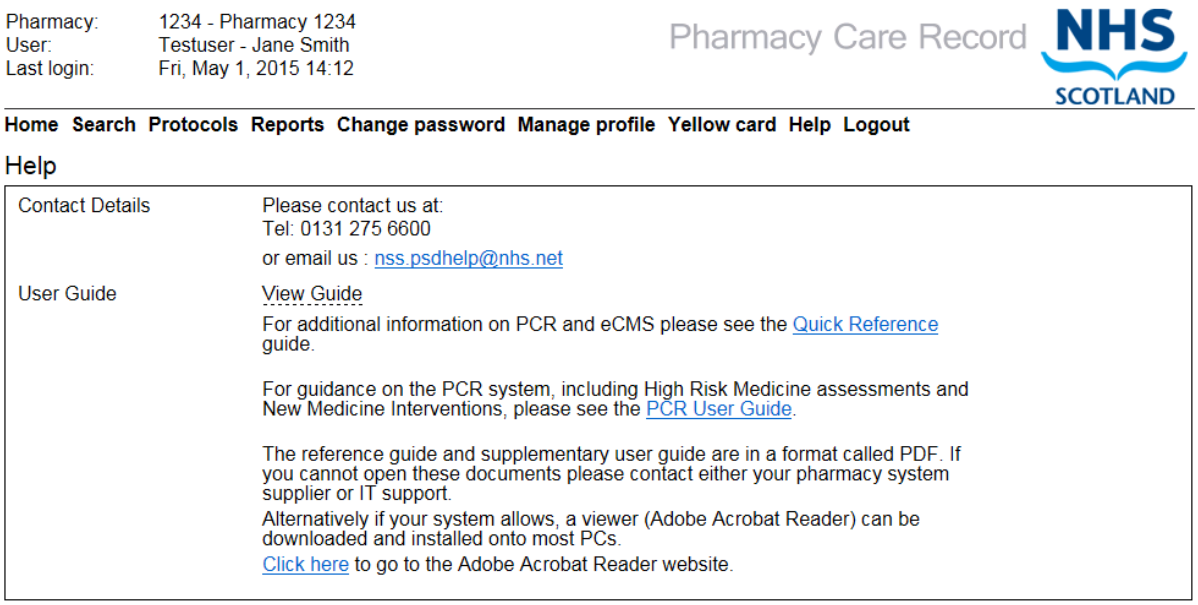


Figure 3-11: PCR help information with link to user guide

The help page also includes information about installing Adobe Reader.

3.2.11 Logout

Selecting the logout option from the high-level menu will logout the current user and display the login page (Figure 3-13)

Figure 3-12: Login page displayed after logout has been selected

4 Pharmacy Home

4.1 Overview

The Pharmacy Home page displays a summary of information about patients within the associated Pharmacy.

The page displays the date and time it was last accessed and can be set as the default landing page after successful login instead of the “Search” page.

4.2 Pharmacist & Pharmacy technician view

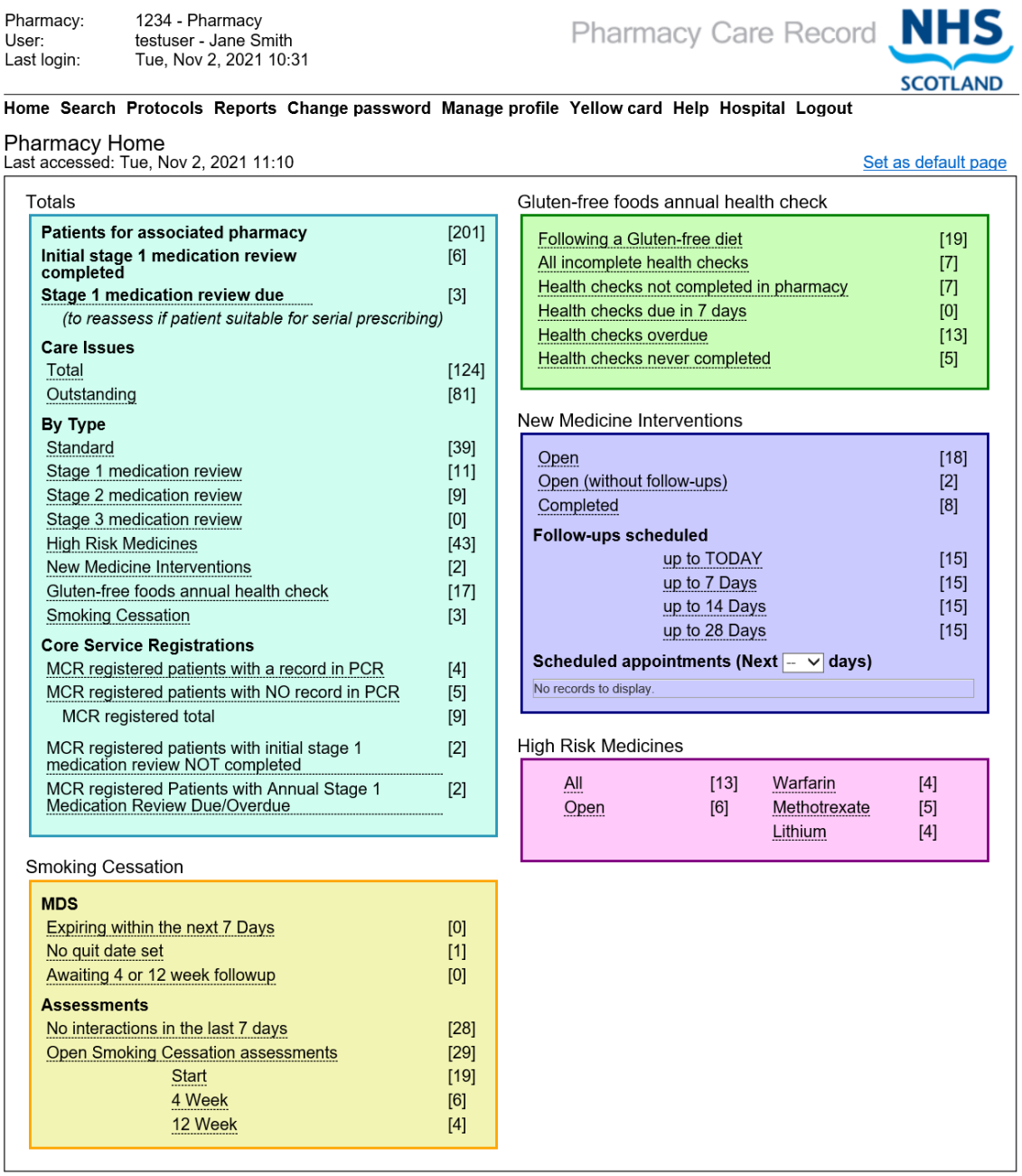


Figure 4-1: Pharmacy Home

Each item listed on the home page displays the total number of records in the list and a link to the detail.

4.3 Home page totals

The following totals are displayed on the patient home:

- Patients for associated pharmacy
- Initial stage 1 medication review completed
- Stage 1 medication review due (to reassess if patient suitable for serial prescribing)

Care Issues
- Total
- Outstanding

By Type (Care Issues)
- Standard
- Stage 1 medication review
- Stage 2 medication review
- Stage 3 medication review
- High risk medicines
- New medicine interventions
- Gluten-free foods annual health check
- Smoking cessation

Core service registrations
- MCR registered patients with a record in PCR
- MCR registered patients with NO record in PCR
    - MCR registered total
- MCR registered patients with initial stage 1 medication review NOT completed
- MCR registered patients with annual stage 1 medication review Due/Overdue

4.4 Smoking Cessation

Mandatory Progress report

- Expiring within the next 7 days
- No quit date set
- Awaiting 4 or 12 week follow up

Assessments

- No interactions in the last 7 days
- Open Smoking cessation assessments
    - Start
    - 4 week
    - 12 week

4.5 Gluten-free

- Following a gluten-free diet
- All incomplete health checks

- Health check not completed in pharmacy
- Health checks due in 7 days
- Health checks overdue
- Health check never completed

4.6 High Risk Medicines

- All
- Open
- Warfarin
- Methotrexate
- Lithium

4.7 New medicine Interventions

- Open
- Open (without follow-ups)
- Completed

Follow ups scheduled

- Up to today
- Up to 7 days
- Up to 14 days
- Up to 28 days

Scheduled appointments

Next “X” days (Where “X” is a dropdown value of 1,7,14, or 28)

- Lists patient name, appointment date, appointment time

5 Search for and create patient records

5.1 Overview

The Search criteria page (Figure 5-1) is automatically displayed when you have successfully logged into PCR (if not invoked from within the PMR application). The Search criteria page can also be displayed at any time by clicking on the 'Search' link on the high-level menu.

A search must include at least one of the following criteria:

- Family name (surname)
- Date of birth
- CHI Number (Search on all or part of a CHI number).

Other identifying information such as given name (first name) or Postcode can also be entered to limit the number of records returned.

Searches are not case sensitive.

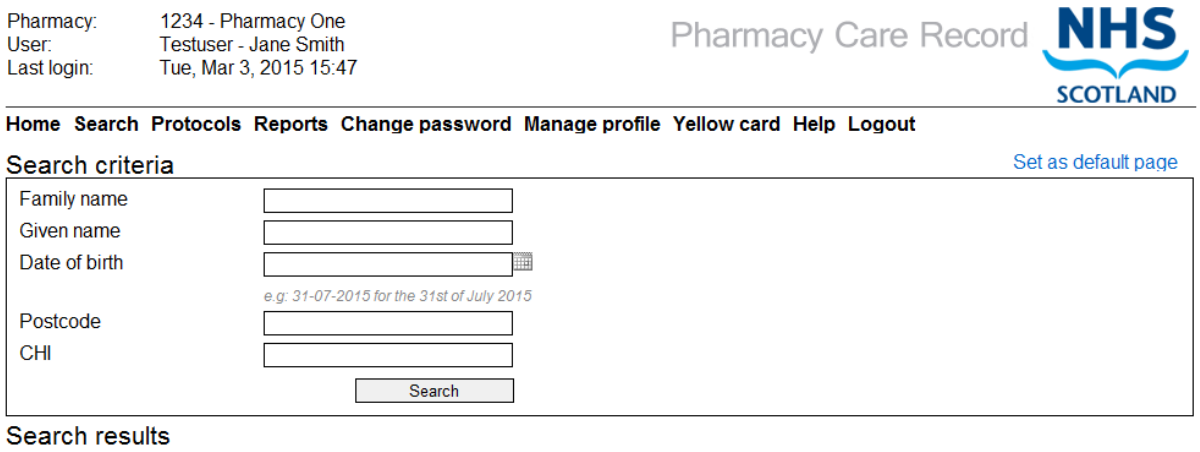


Figure 5-1: Search criteria page

The scope of any search is limited to patients who have a PCR record at the community pharmacy where the user is currently associated. If a patient has a PCR record associated with another pharmacy it will not be visible. (It is possible to create a new record for the patient which will then be uniquely linked to the current associated pharmacy).

Note: If the "Pharmacy Home" page is set as the default landing page, the option "Set as default page" is visible on the search page. Select this option to change the search page as the default landing page (on login).

Note: If there are any open Smoking Cessation Assessments that have a mandatory progress report submission due (4week or 12week) in the next 7days, the system will display a warning about the same, along with a link to a report that will list relevant assessments.

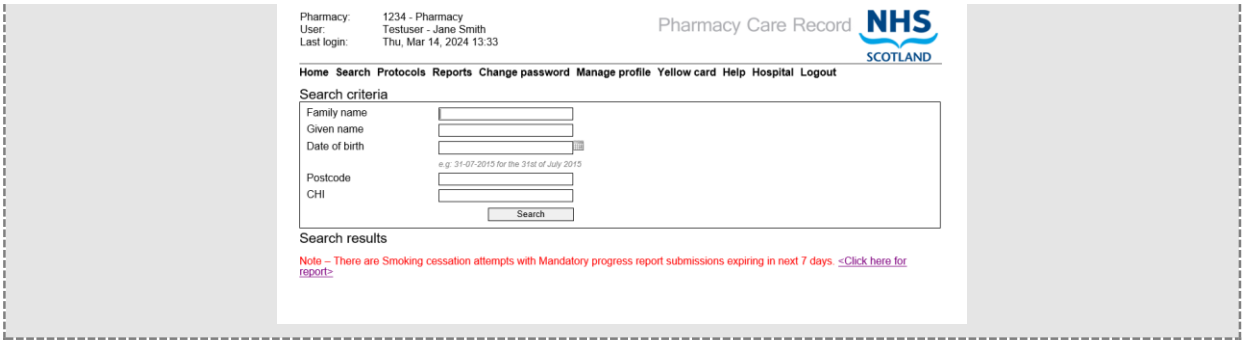


Figure 5-2-1: Search criteria page with warning text

5.2 Using the search function

To search for a patient:

- Type the search criteria into the form and click the “Search” button

5.2.1 If the search is successful

- A list of records that match your criteria will be displayed (Figure 5-2)

User Options:

- Select the “view” link for the patient you want to view (this will display the patient home page for the selected patient); or
- Create a new patient record if you are satisfied that the patient you were looking for does not exist in PCR

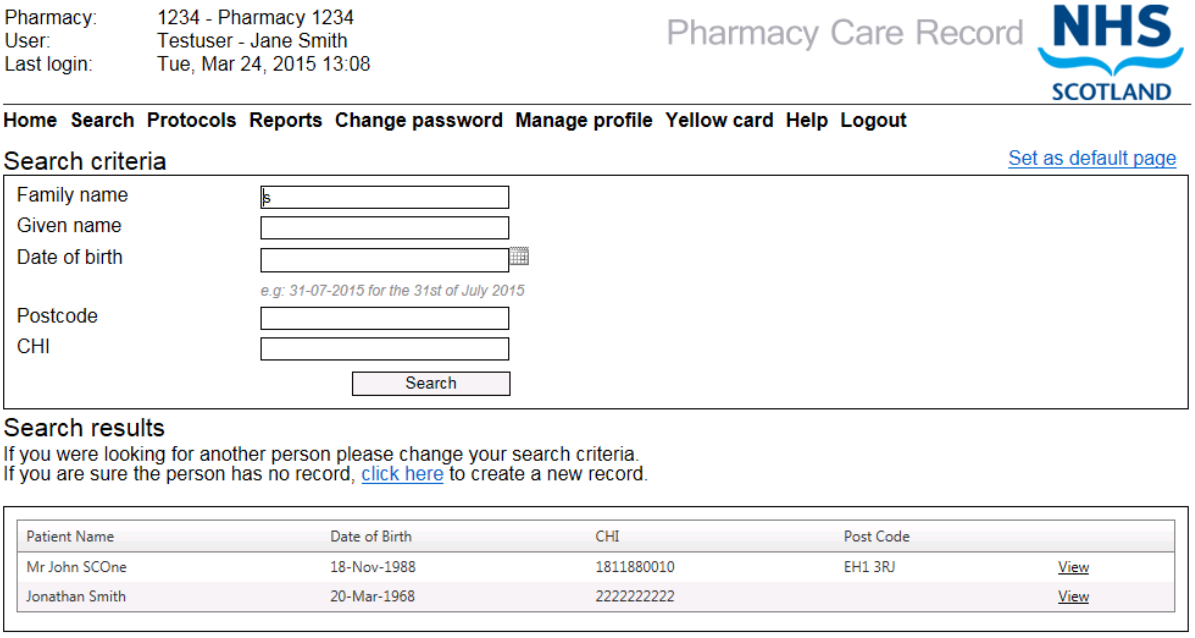


Figure 5-3: Search results list

5.2.2 If the search is not successful

- A Message will be displayed below the “Search criteria” form advising that “No matching patient records have been found” (Figure 5-3)

  User options:

  - Search again using different search criteria; or
  - Use the “click here” link to create a new PCR record (Figure 5-3)

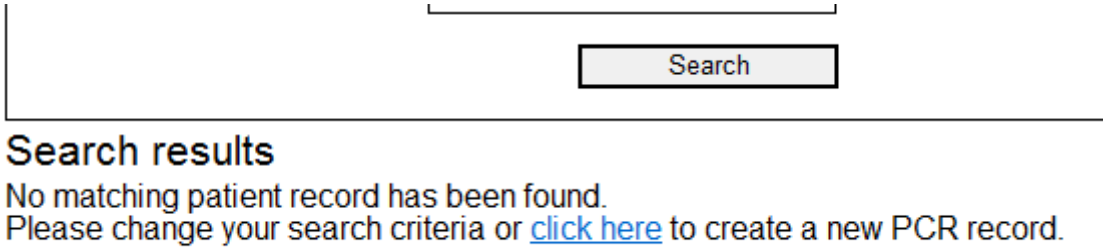


Figure 5-4: No matching patient records found

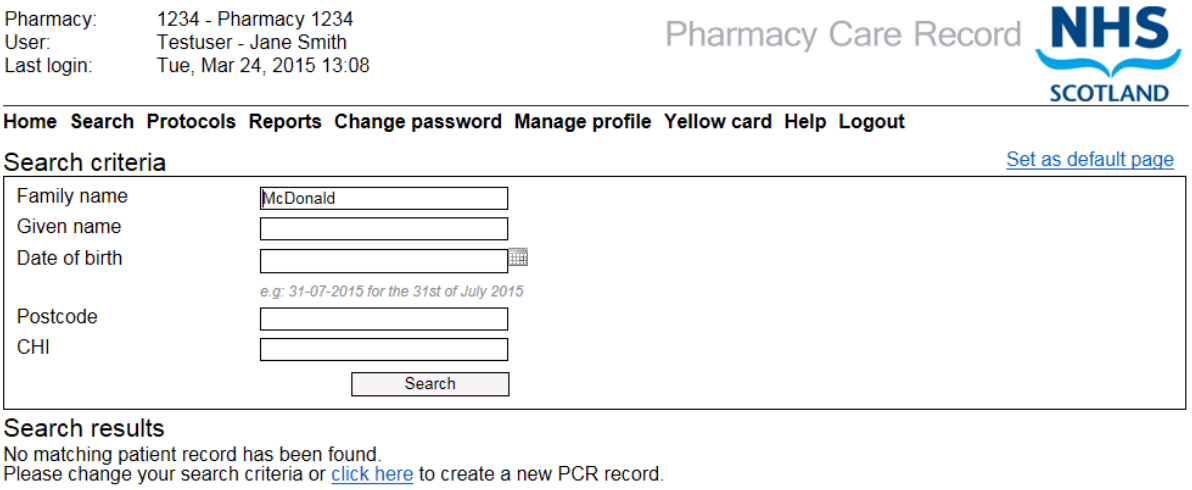


Figure 5-5: No matching patient records found

5.3 Manually create a patient record

The option to manually create a new patient record is only available via the “click here” link if:

- a patient search has completed and no records have been found (Figure 5-4)
- a patient search has completed and the searched for patient is not listed (Figure 5-4)
- **Note:** [Section 13 of this User Guide details the process for creating a patient record using the patient interface functionality between your PMR application and PCR.]

5.3.1 Where the CHI Number is known

To manually create a patient record:

- Select the “Click here” link from the Search criteria / search results page, (The “Patient Details” input page is displayed, Figure 5-5)

Figure 5-6: Patient details

- Enter the patient details
- Select the “Save” button*, the patient home will be displayed (Figure 5-10). A new patient will be created in PCR.

***Note:** CHI, Given name, family name, and date of birth are mandatory. All other patient details are optional.*

5.3.2 Where the CHI Number is not known

If the CHI is not known, the “Find CHI” function can be used to search the National CHI database.

This function was introduced in PCR Phase 9 to primarily support the creation of patient records for the smoking cessation service.

To search for a CHI Number:

- Navigate to the Patient details page by selecting the link as described in section 3.3.

The default state of the patient details page highlights what information is mandatory for CHI search, Figure 5-6. (using greyed-out text “Mandatory for CHI search” within the text input boxes)

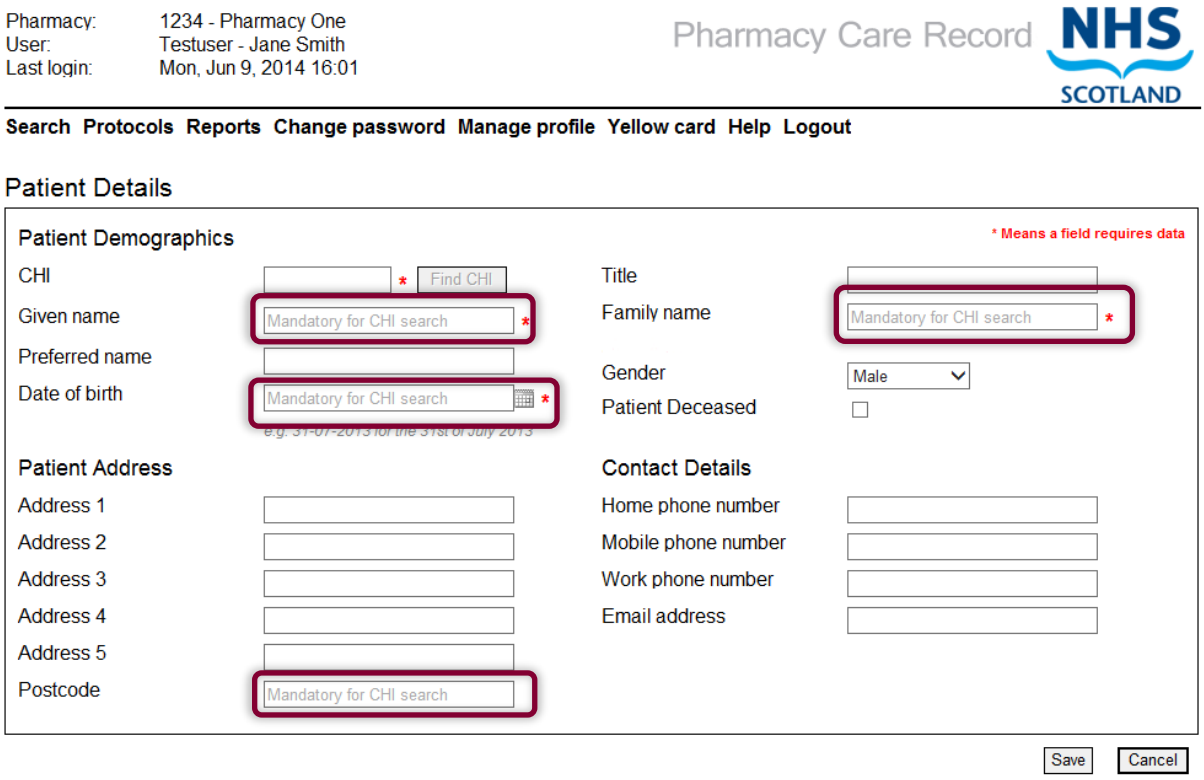


Figure 5-7: Highlighted mandatory for CHI search

- Enter all information that is “Mandatory for CHI”,
    - Given Name
    - Family Name
    - Date of Birth
    - Postcode

- Click the “Find CHI” button

- If a unique match is found on the CHI system the CHI number will be populated, Figure 5-7.

The "Find CHI" button is disabled until all "mandatory for CHI search" information is entered by the user.

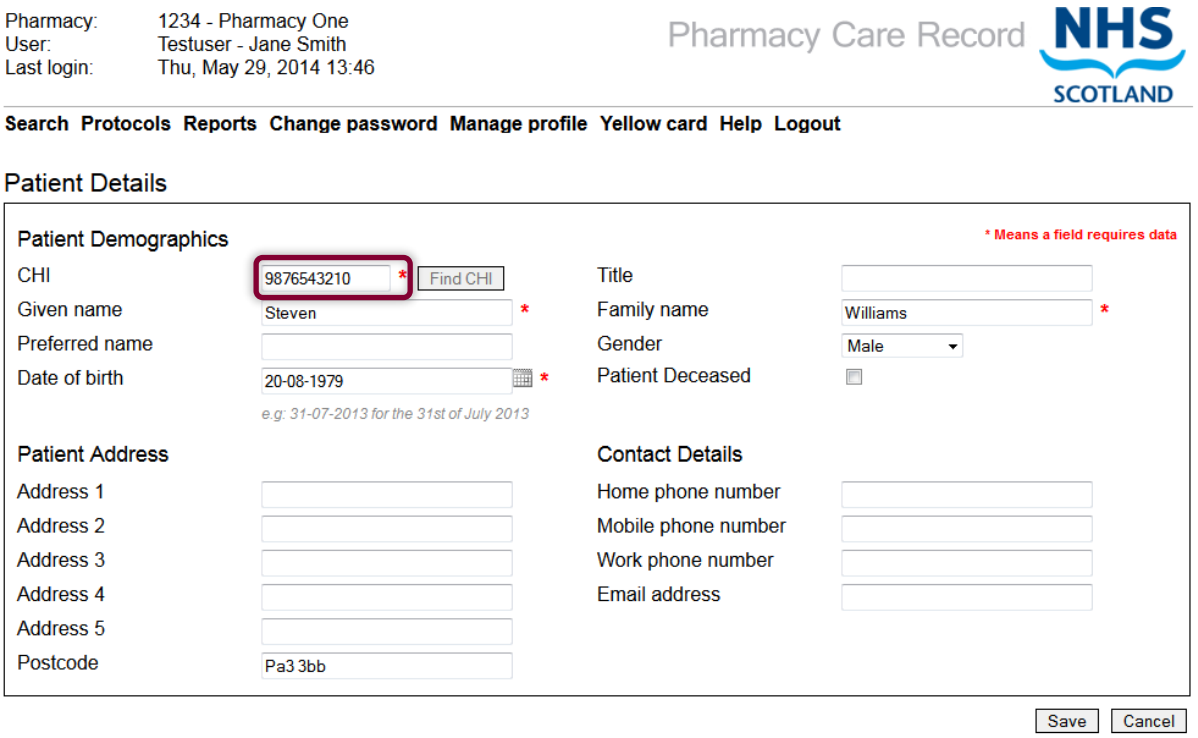


Figure 5-8: Unique Match Found

- If more than one match is found on the CHI system a message will display advising to review search criteria, Figure 5-8

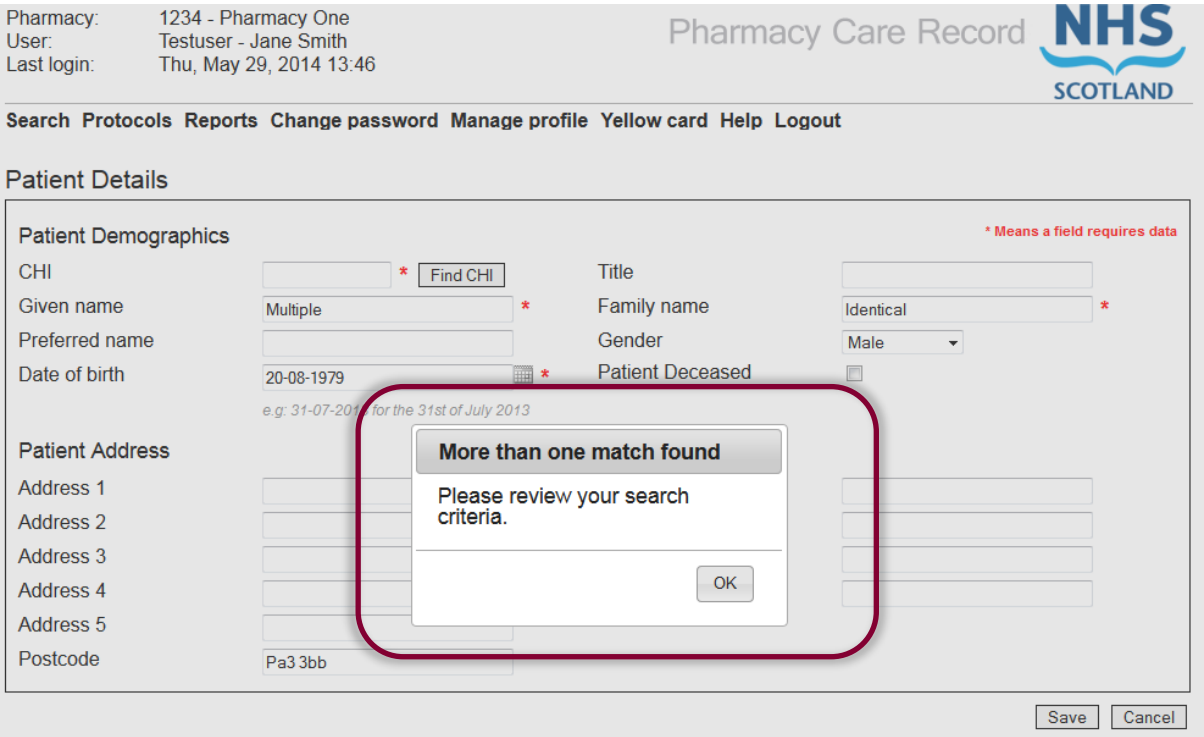


Figure 5-9: More than one match found

- If no match is found on the CHI system an error message will display advising to alter search criteria, Figure 5-9.

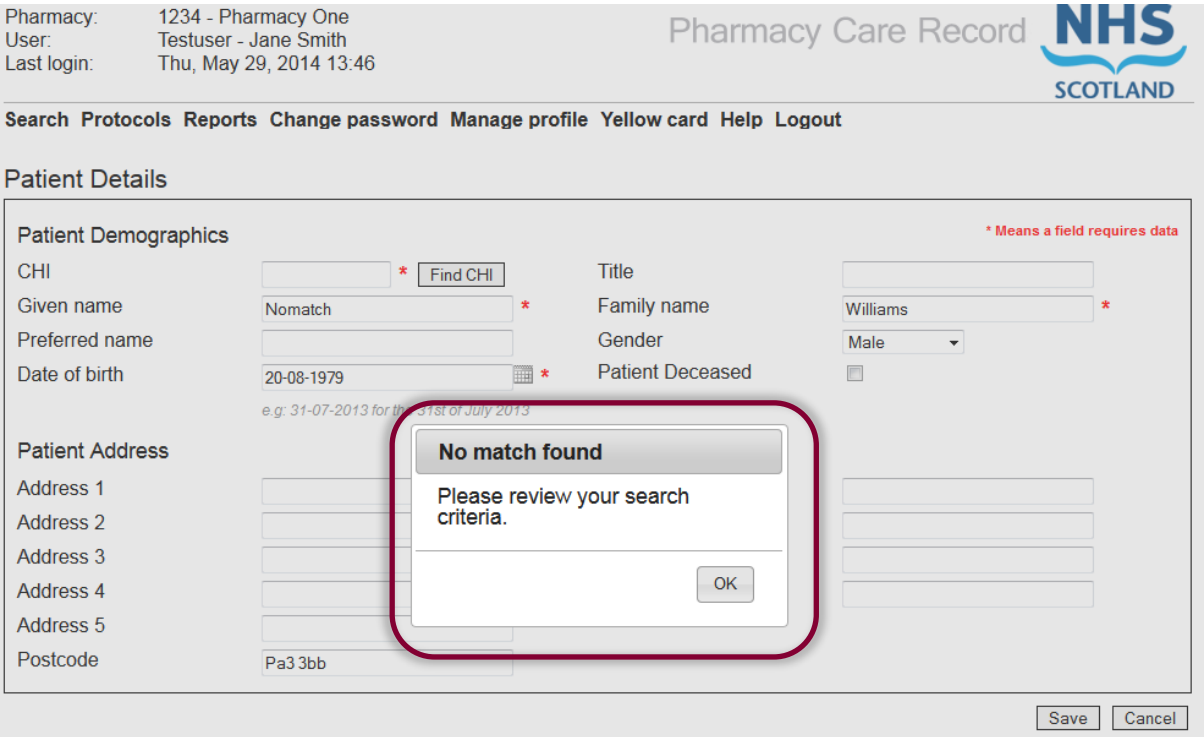


Figure 5-10: No match found

Once a unique match has been found, follow steps as described in section 3.5.1 to complete the creation of the patient record.

5.4 View Patient details

Once a patient has been selected or newly created via the search process the patient home is displayed, Figure 5-10. It may be required to “scroll up/down” to see all sections of this page.

The Patient home page includes the patient banner and defaults to the Pharmaceutical care plan tab. The patient banner is displayed on all pages within the patient context. Other tabs that can be displayed based on user role are High risk medicine assessment, new medicine interventions and support tools.

The default view of patient banner displays the patients name, date of birth, gender, CHI number and, if applicable, an icon to signify if the patient is registered for MCR. The default view can be expanded to also show the address and contact information for the patient.

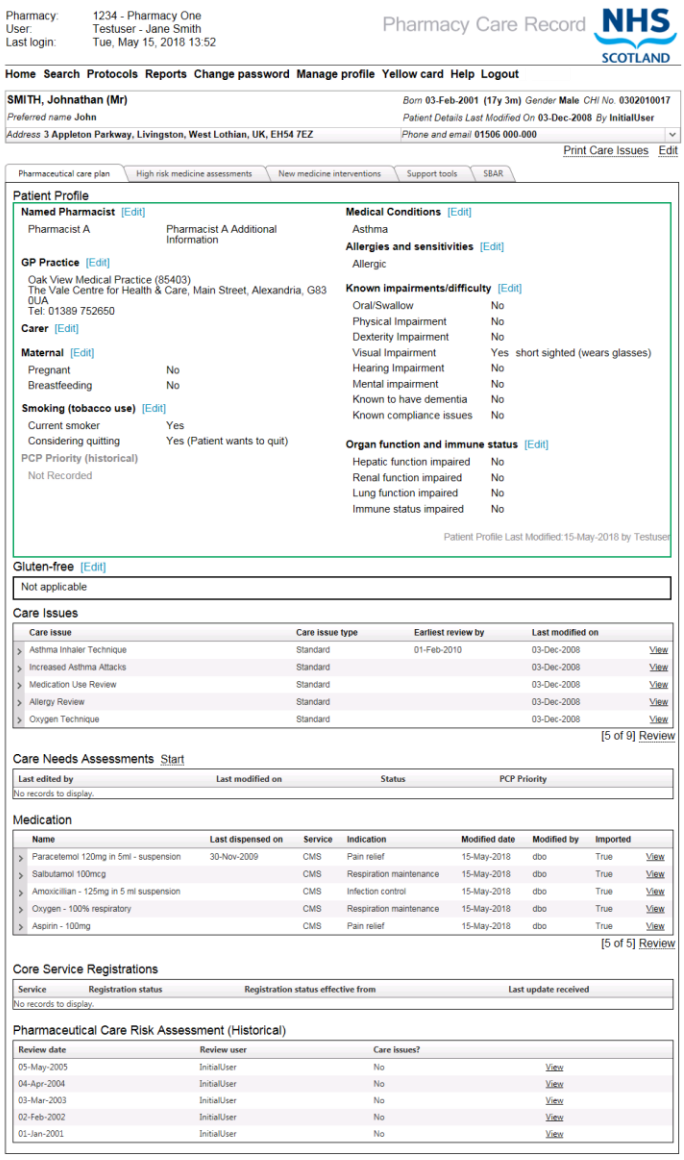


Figure 5-11: Patient Home page

To show/hide the patient address and contact details, Figure 5-11, select the arrow on the right-hand side of the patient home page.

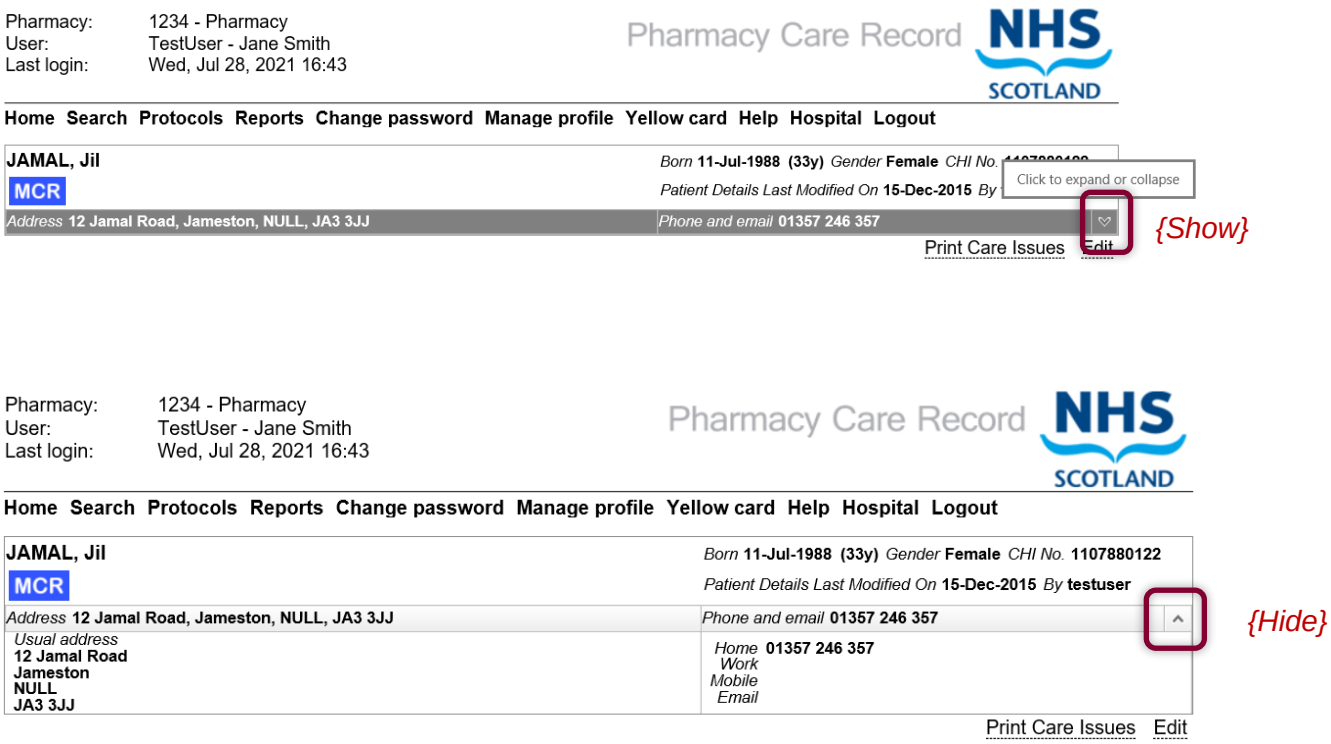


Figure 5-12: Show/hide patient address and contact details

5.5 Edit Patient Details

To edit patient details, select the “Edit” link located at the top right of the patient profile on the patient home screen. This will display the patient details screen. (Figure 5-12)

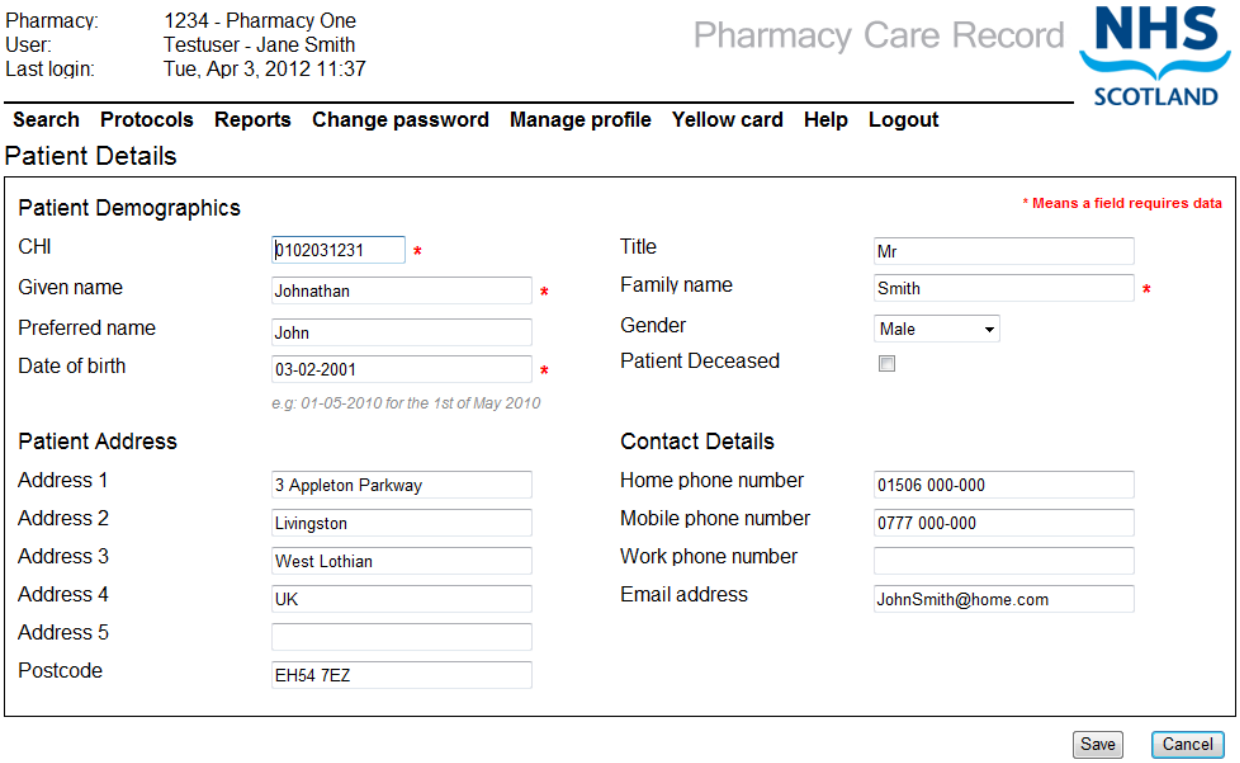


Figure 5-13: Edit Patient Details

Edit the details as required and click the “Save” button. Selecting the “Cancel” button will display the patient home – no details will be changed.

NOTE: Mandatory information is highlighted with a red asterisk. (The “Find CHI” button is not displayed on the edit page.)

6 Pharmaceutical Care Plan (PCP)

6.1 Overview

The patient home page, Figure 6-1, is the starting point for entering any information associated with a patient's Pharmaceutical Care Plan (PCP). On creation of a new patient record (Section 5) a "blank" PCP is automatically created.

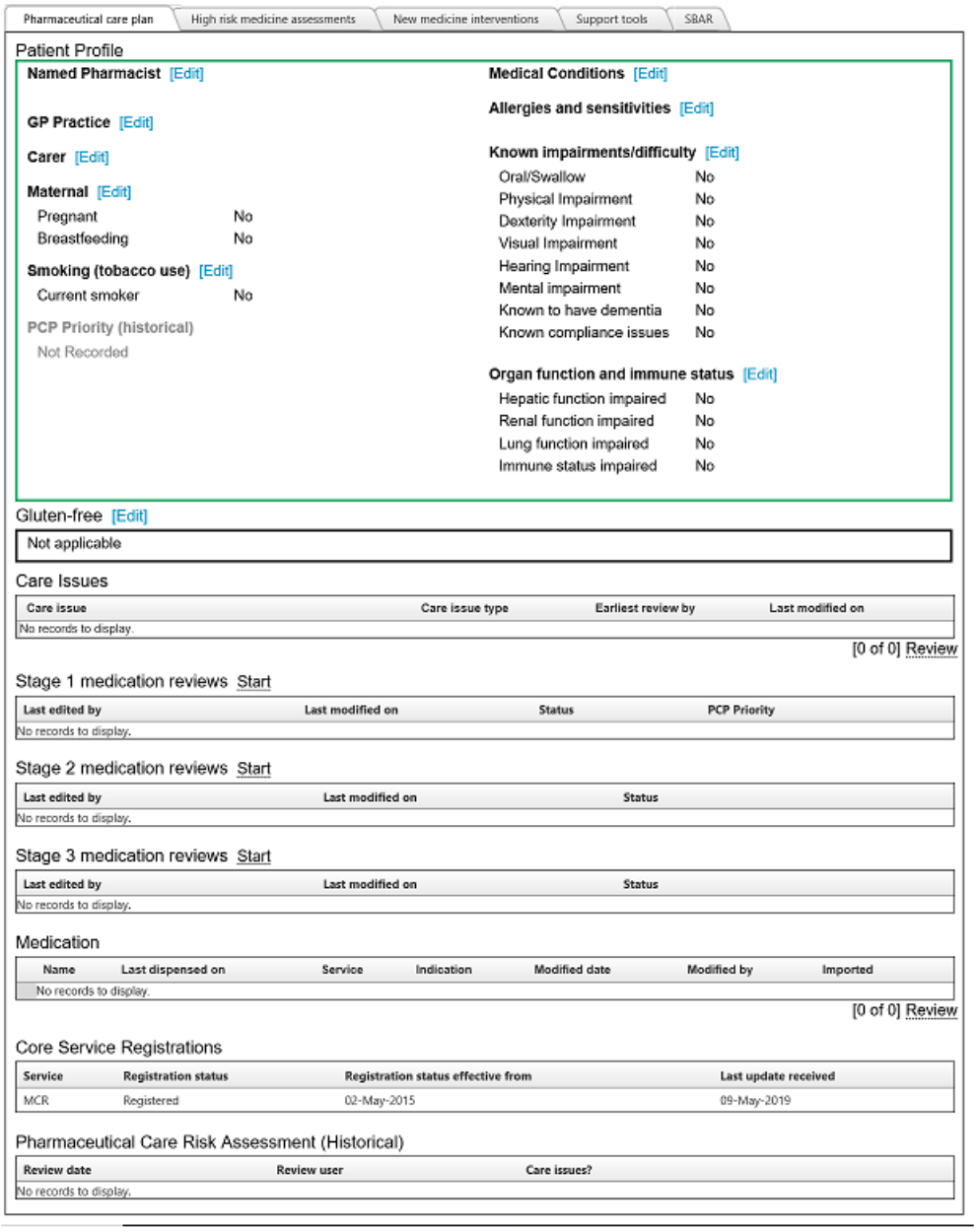


Figure 6-1: Patient Home or PCP tab (Pharmacist view)

The PCP contains information and functions relating to:

- Patient Profile
- Gluten-free
- Care Issues

- Stage 1 medication review
- Stage 2 medication review
- Stage 3 medication review
- Medication
- Core Service Registrations
- Pharmaceutical Care Risk Assessment (Historical)

The NES 'Serial Prescribing: MCR Implementation Resource' explains the practice elements of pharmaceutical care planning and how to complete the relevant information in each of the above four sections of the PCP. The information in this User Guide focuses on the practicalities of entering and recording information into the care plan.

6.2 View patient profile

The patient profile is accessed from the Pharmaceutical Care Planning tab on the patient home page (Figure 6-2) is used to record information about the patient's health.

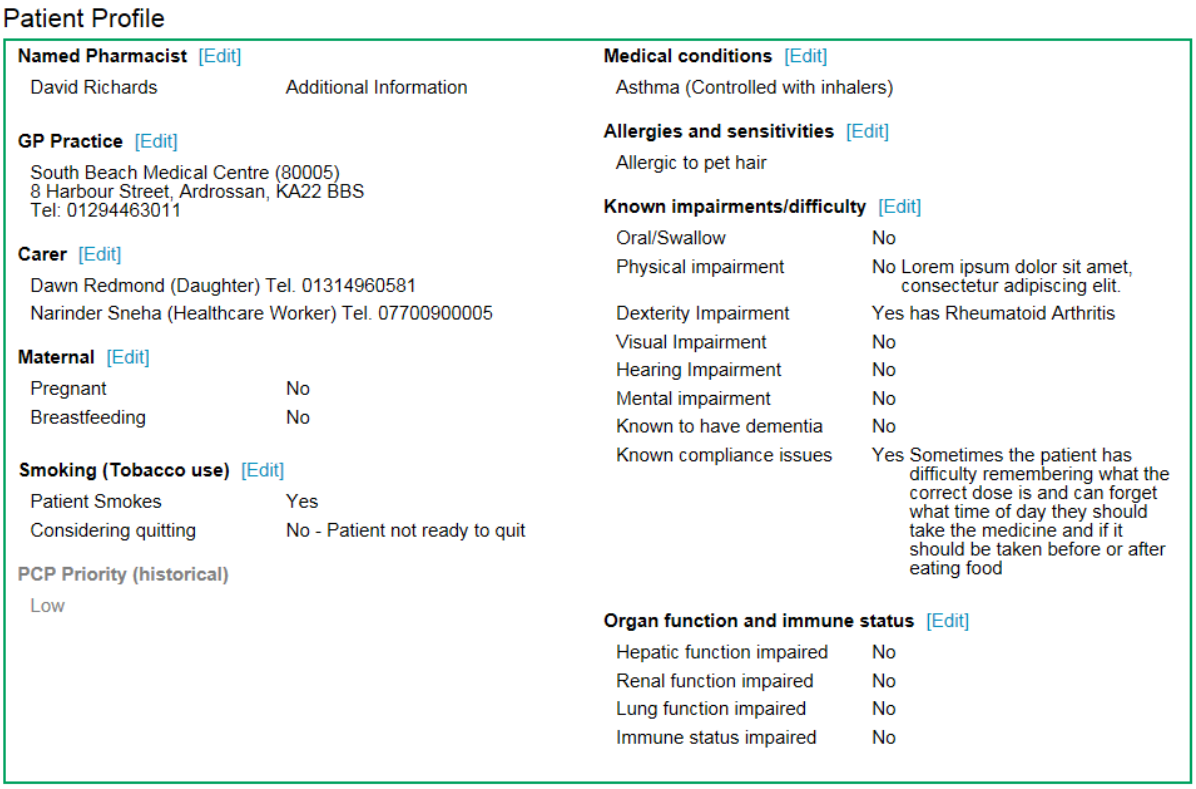


Figure 6-2: Patient Profile

The patient profile contains the following information:

- Named Pharmacist (and additional information)
- GP Practice (Search for and add a GP practice)
- Carer (Add multiple carers and their contact details)
- Maternal
- Smoking (Tobacco use)
- PCP Priority (Historical)
- Medical Conditions
- Allergies and sensitivities
- Known impairments/difficulty
- Organ function and immune status

6.3 Maintain patient profile information

6.3.1 Named pharmacist and additional information

To maintain the ‘Named pharmacist and additional information’ select the “Edit” link next to the bold title on the patient profile (Figure 6-2). The edit page is displayed (Figure 6-3).

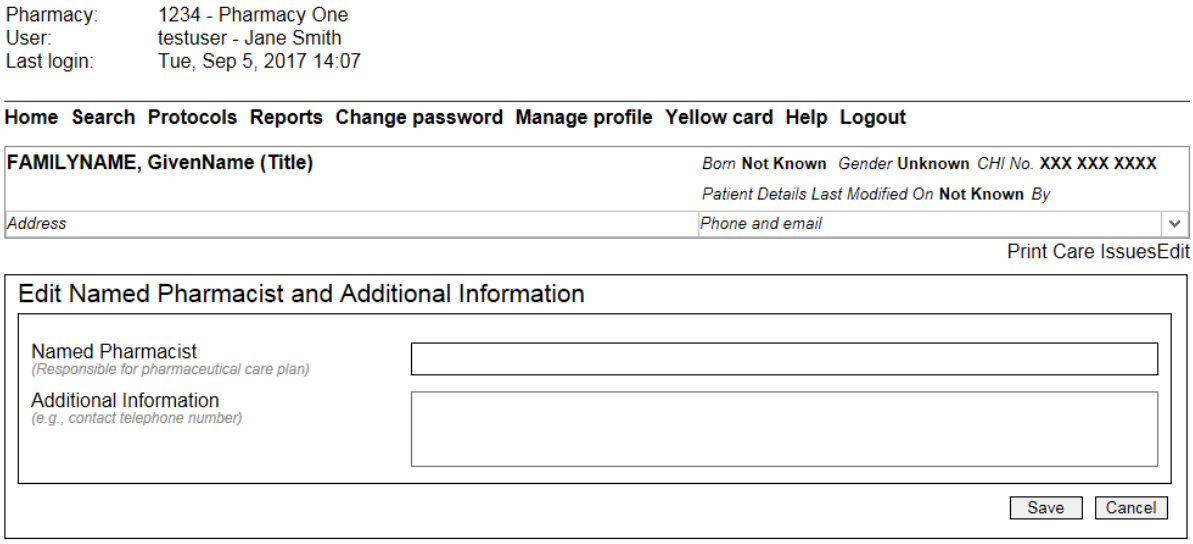


Figure 6-3: Edit named pharmacist and additional information

All information is optional. Select Save to save changes and return to the Patient Home. Select Cancel to return to the patient home without saving changes.

6.3.2 GP Practice

Having verified the correct GP practice for the patient use this function to search for the GP practice and store the details in the patient profile. The list of GP practices available in the search is kept up to date from information provided by NHS National Services Scotland.

Search for and save a GP practice

Select the “Edit” link next to the bold “GP practice” title on the patient profile (Figure 6-2). The GP Practice Search/ edit page is displayed (Figure 6-4).

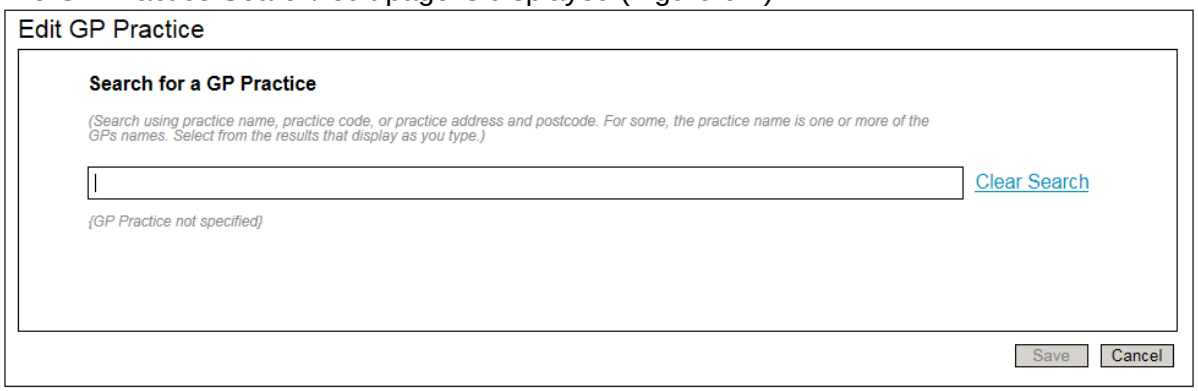


Figure 6-4: GP Practice Search / Edit

Search for the GP practice using the practice name, practice code, practice address or postcode. The search results display in a list as you type.

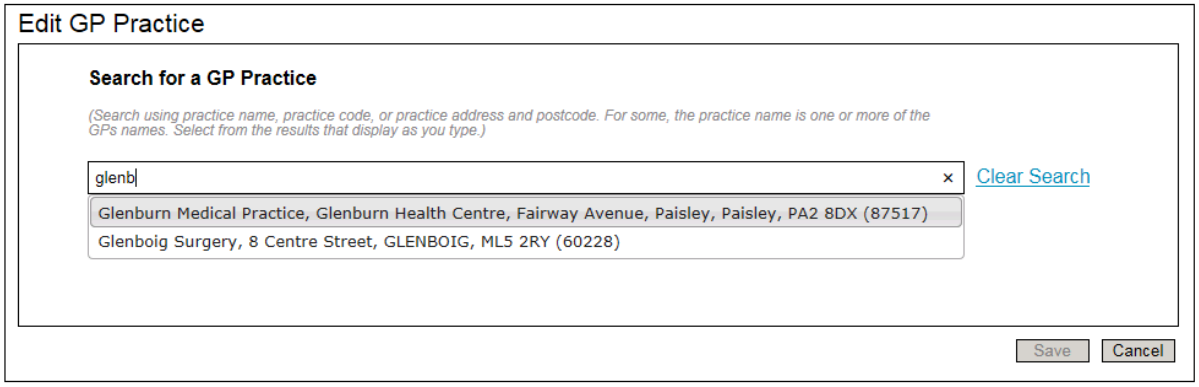


Figure 6-5: enter search term

Select a GP Practice from the search results list, the selected practice is displayed on the page.

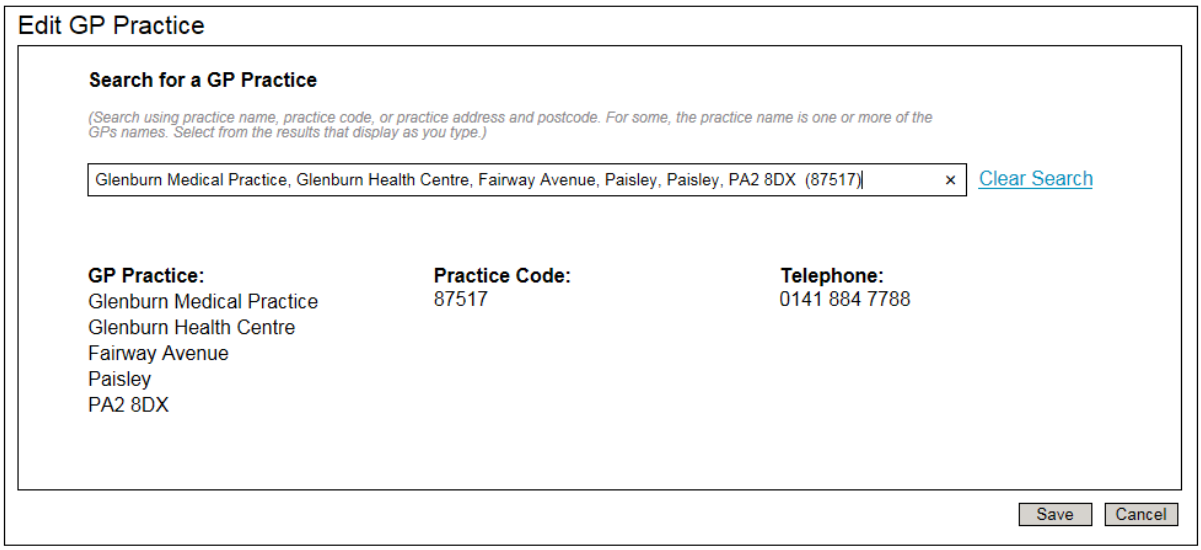
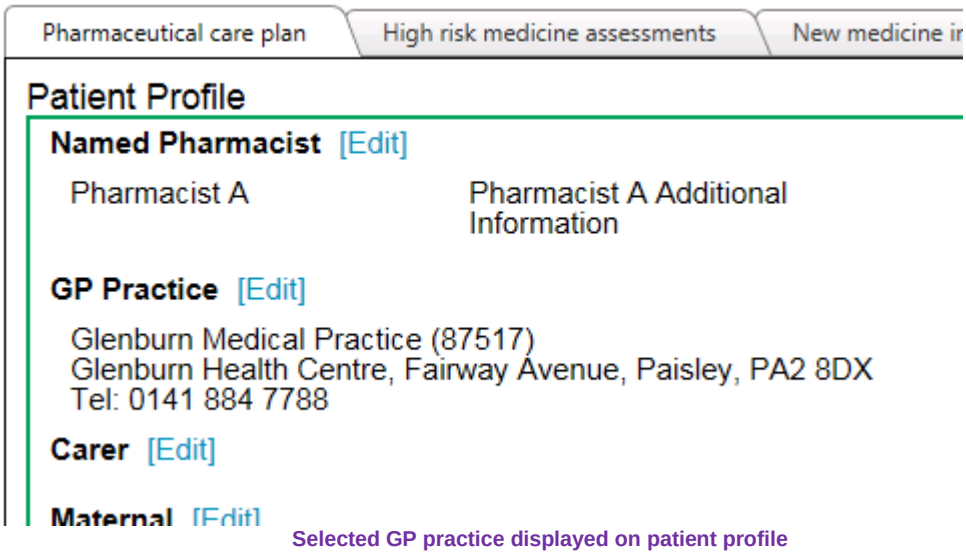


Figure 6-6: Select from list

Select the save button, the patient home is displayed and the selected GP practice is saved and displayed on the patient profile.



Selected GP practice displayed on patient profile

Remove a GP practice

An existing GP practice can be removed using the “Remove GP Practice” button

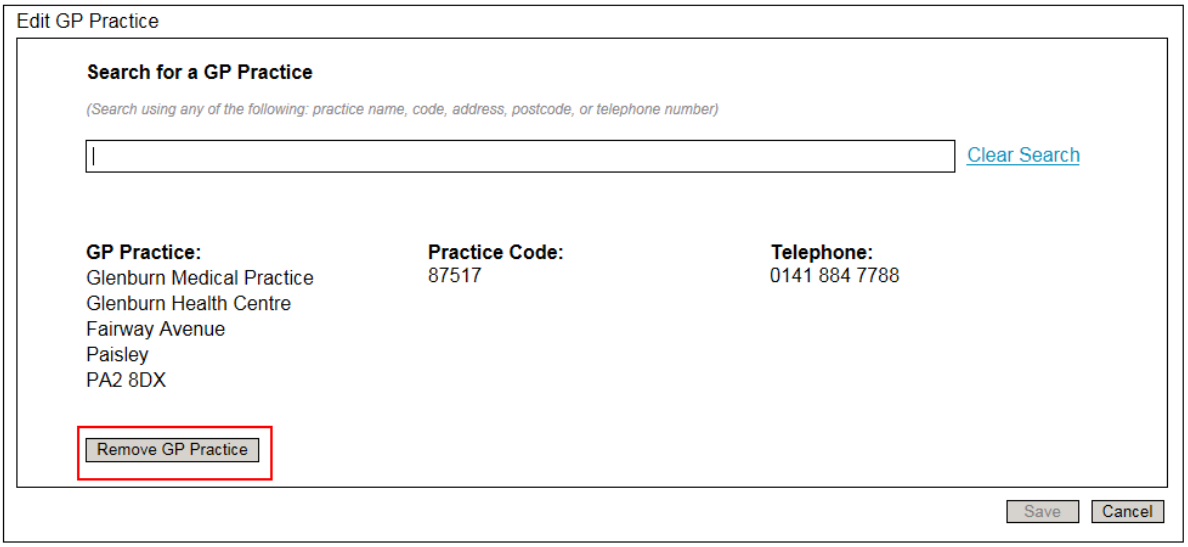


Figure 6-7: Remove GP Practice

Update a GP practice

Update a GP practice by simply performing another search, selecting from list and save.

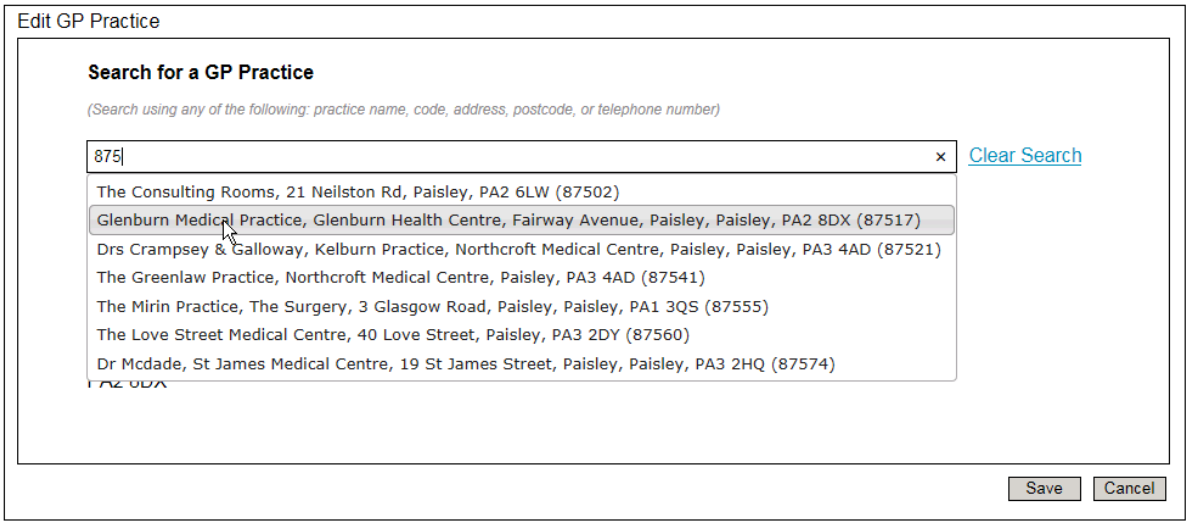


Figure 6-8: Search again for a GP Practice

Example partial keyword search

Use partial keyword search to return search results

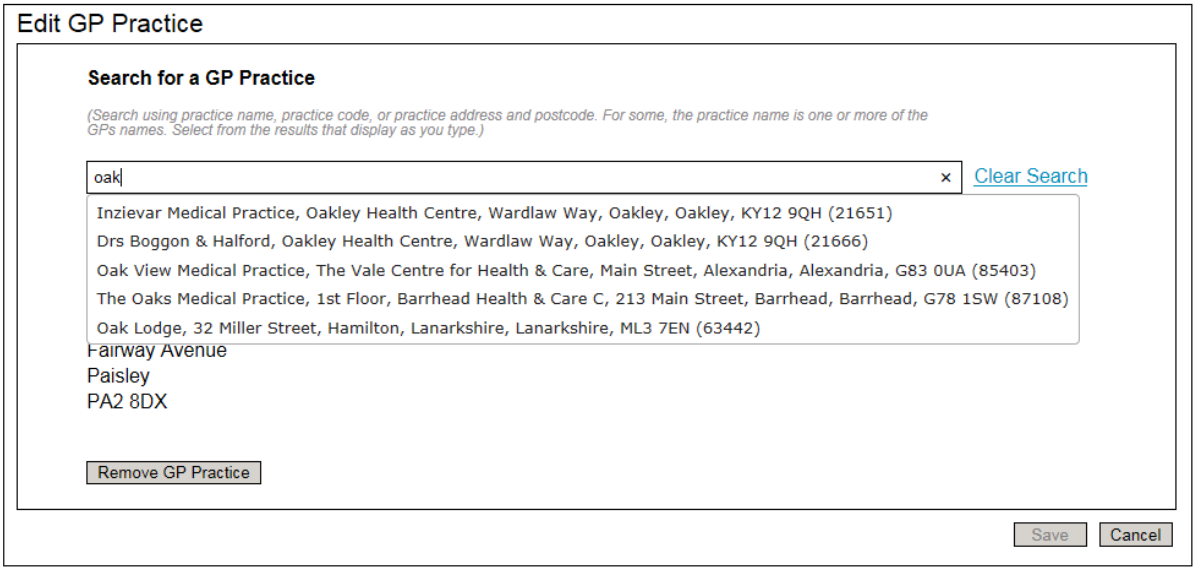


Figure 6-9: Partial keyword search

Search using part of an address

Use part of an address to search. E.g. town or Postcode.

Figure 6-10: Search using part of an address

GP Practices with no name

Some GP Practices have no name or are simply referred to as “The surgery”. For these practices the name of one or more GPs is listed instead of a practice name.

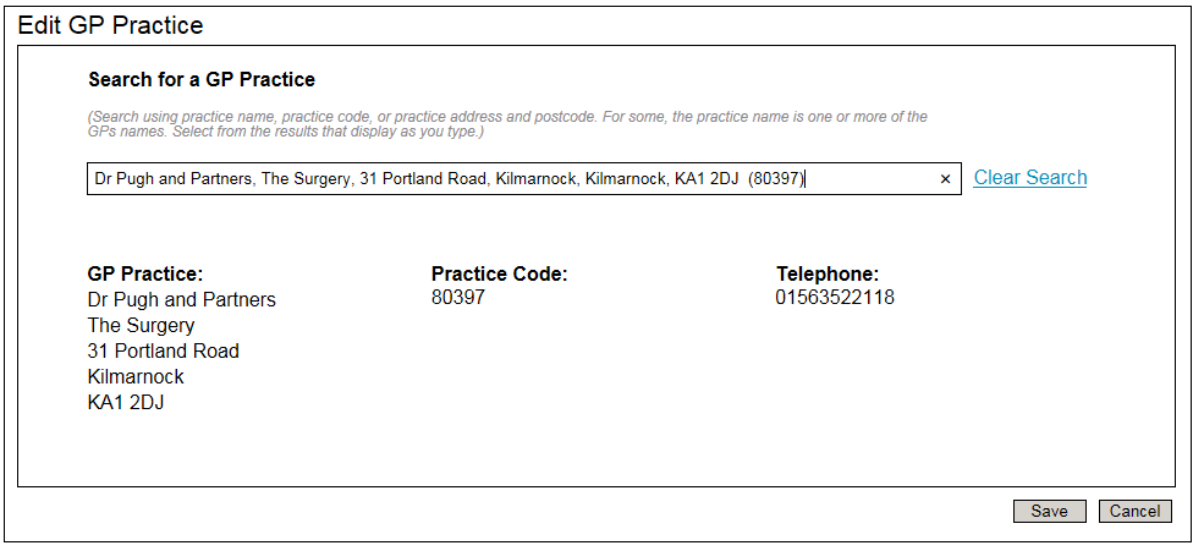


Figure 6-11: GP practice with no name

Warning Message: GP Practice deleted from source data

This message is displayed if a GP practice that has previously been added has been deleted form the source data (obtained from NHS Information Services Division).

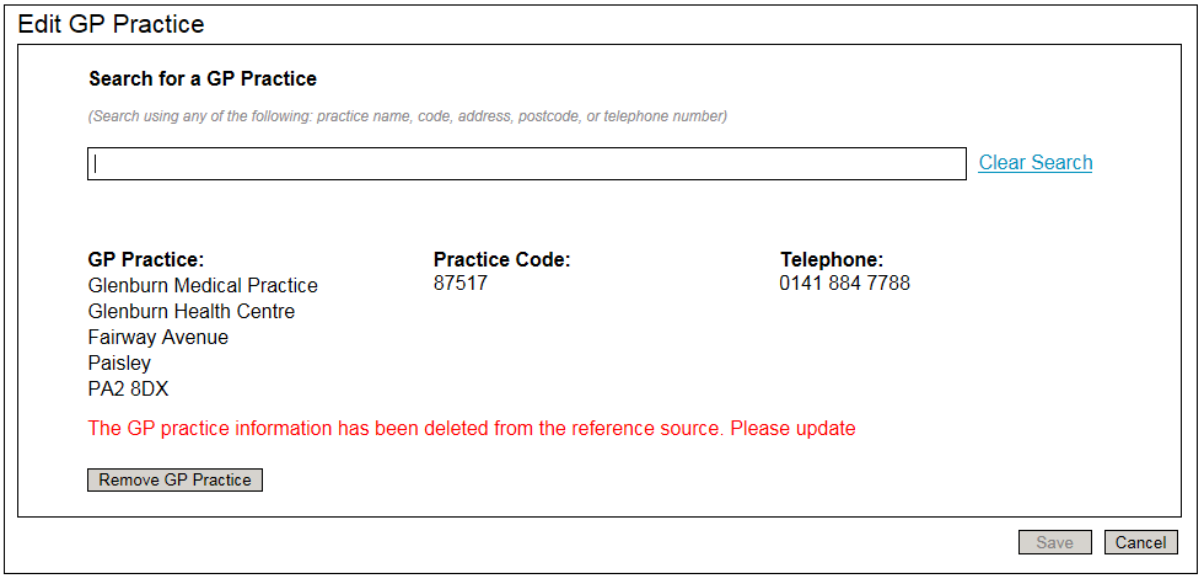


Figure 6-12: GP Practice deleted from reference source

This message is shown if a previously added GP practice has been subsequently deleted from the reference data source.

Warning Message: GP Practice information may be invalid

This message is displayed if a GP practice that has previously been added has been signified in the source data (obtained from NHS Information Services Division) as being no longer valid. This could be due to the practice closing or merging with another practice.

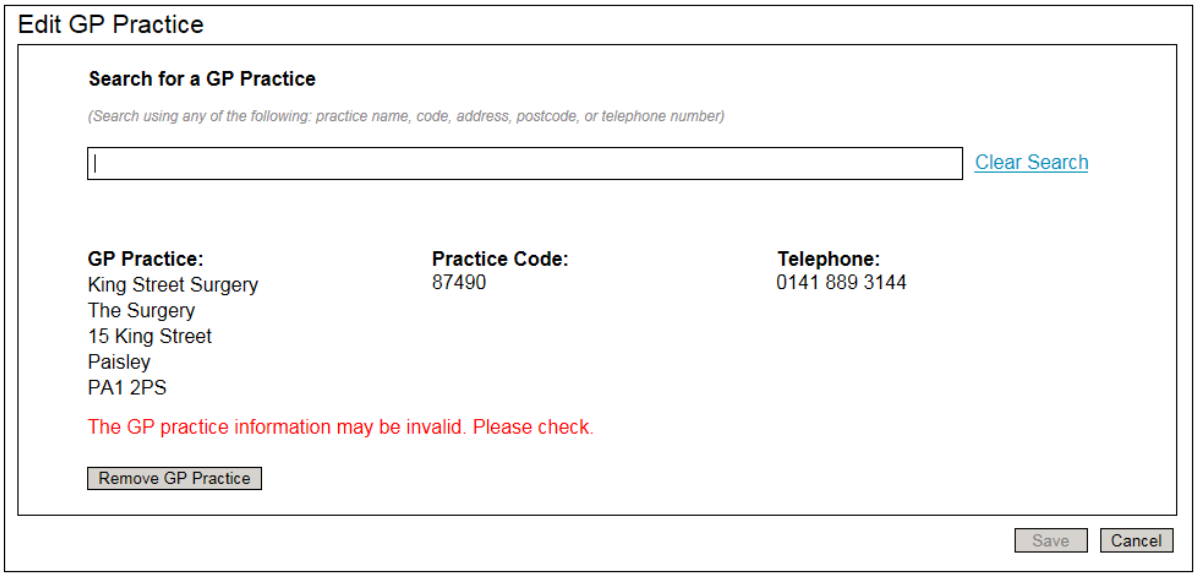


Figure 6-13: GP Practice may be invalid

6.3.3 Carer

Function to add details of a carer. Patient consent for their pharmaceutical care to be discussed with the carer must be recorded before carer details can be added.

Maintain carer information

Select the “Edit” link next to the bold title on the patient profile (Figure 6-2). The carer page is displayed (Figure 6-14)

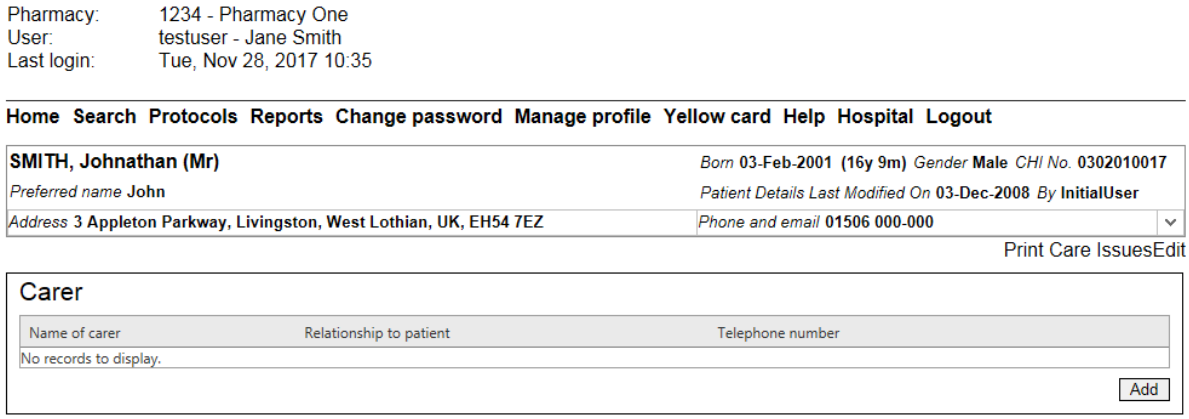


Figure 6-14: Carer

Add a carer

Select the “Add” button (Figure 6-14). A pop-up form is displayed (Figure 6-15).

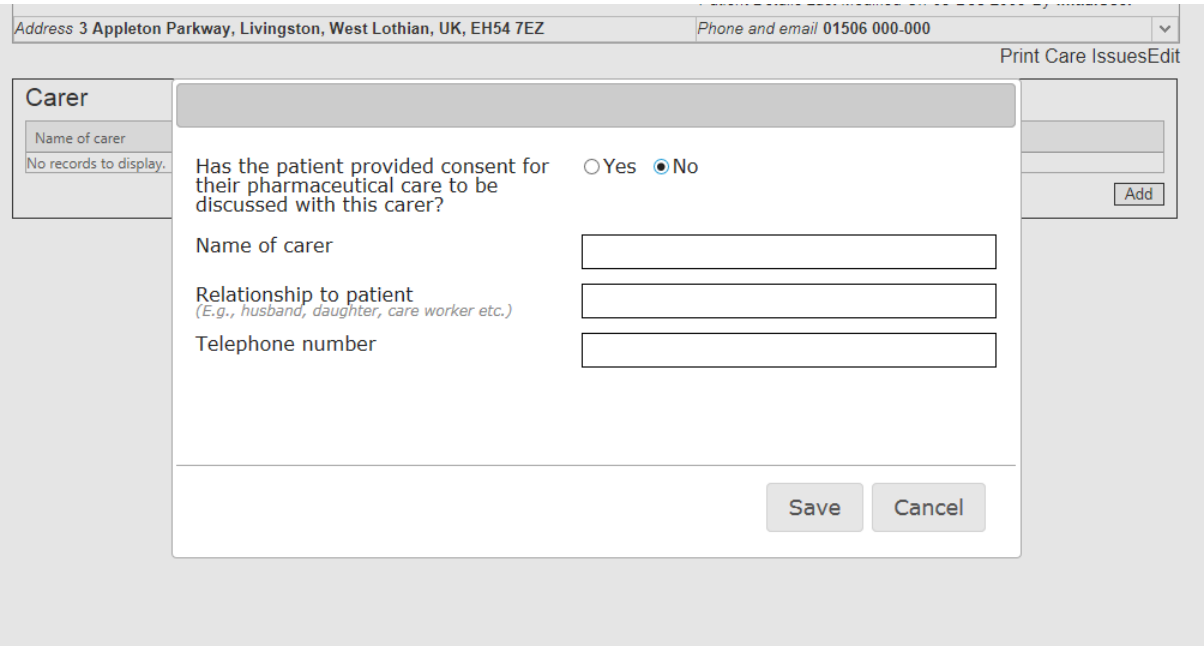


Figure 6-15: Add Carer pop-up

Page option	Guidance
Has the patient provided consent for their pharmaceutical care to be discussed with this carer?	This radio button is set to “No” by default. Only select “Yes” if you have discussed and have agreement from the patient to discuss their car with the carer. **It is not possible to add a carer if patient consent has not been provided.**
Name of carer	Enter the full name of the carer
Relationship to patient	Describe the carer’s relationship to the patient. E.g., husband, wife, brother, sister, other family member, care worker etc.
Telephone number	Enter the telephone number for the carer. If you have more than one number you can create a separate carer record (for the same person) with each phone number.
Save Button	Will save any changes made and automatically return to the patient home.
Cancel button	Will automatically return to the patient home, any entered information since the last successful save will be lost.

6.3.4 Maternal

Maintain information for “Maternal” that will be displayed on the patient home.

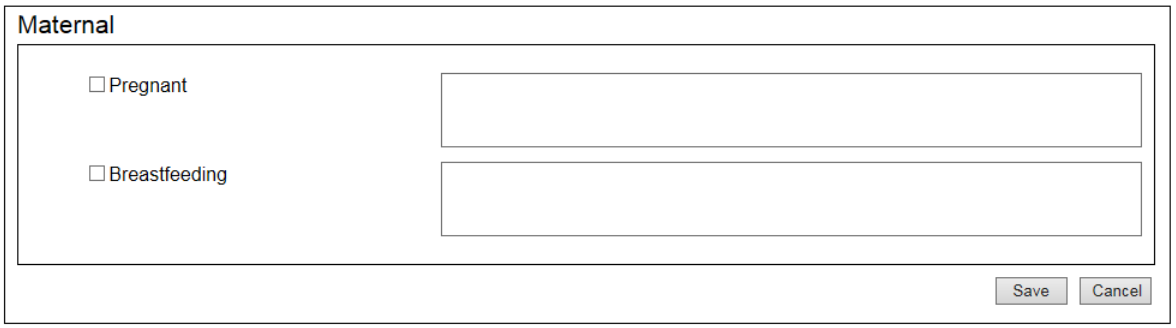


Figure 6-16: Maternal

Page option	Guidance
Pregnant (Checkbox)	Select if the patient is pregnant
Pregnant (Notes)	Enter notes in relation to pregnancy (Optional)
Breastfeeding	Select if the patient is breastfeeding
Breastfeeding (Notes)	Enter notes in relation to breastfeeding (Optional)
Save (Button)	Saves changes
Cancel (Button)	Navigates to patient home, changes not saved

6.3.5 Smoking tobacco use

Maintain information for smoking (tobacco use).

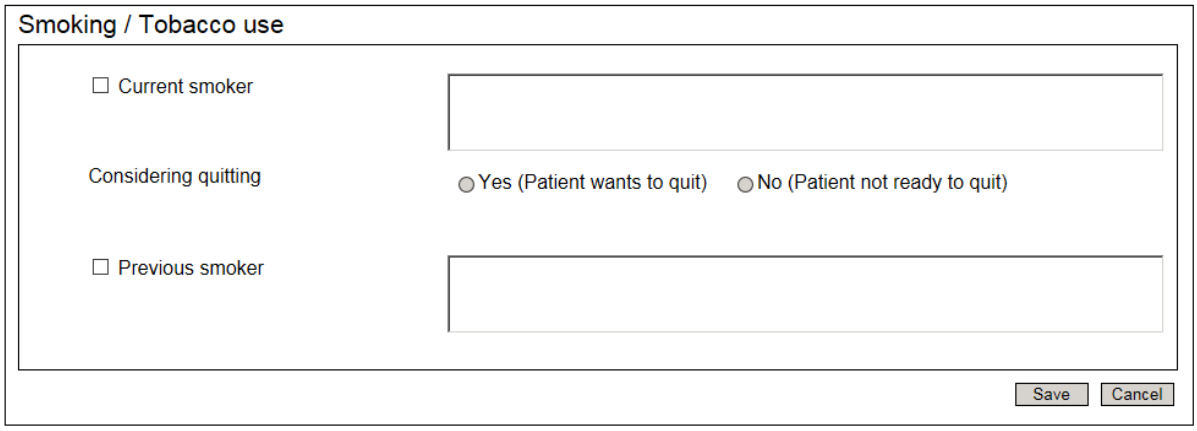


Figure 6-17: Edit Smoking (tobacco use)

Page option	Guidance
Current smoker (checkbox)	Unchecked by default. Mutually exclusive with “Previous smoker” checkbox (if checked when previous smoker is selected it will automatically be unchecked. Displayed on patient profile if checked Not displayed on patient profile if previous smoker is selected.

Current smoker (notes)	Enter optional notes. Notes will be retained irrespective of checkbox selection. Only displayed on patient profile if current smoker checkbox is checked.
Considering quitting (Yes/No)	Disabled until “Current smoker (checkbox)” is checked. A selection (yes or no) must be made if “Current smoker (checkbox)” is checked. Selected option will be displayed on patient profile. Selection will be cleared and page option disabled when “Previous Smoker (checkbox)” is selected.
Previous Smoker (checkbox)	Unchecked by default. Mutually exclusive with “Current smoker” checkbox (if checked when “Current Smoker (checkbox)” is selected it will automatically be unchecked. Displayed on patient profile if checked Not displayed on patient profile if previous smoker is selected.
Previous smoker (notes)	Enter optional notes. Notes will be retained irrespective of checkbox selection. Only displayed on patient profile if “Previous smoker (checkbox)” is checked.

6.3.6 PCP Priority (Historical)

This information corresponds to the last PCP priority recorded prior to PCR version 13.1.

6.4 View Gluten-free information

The Gluten-free information is displayed directly below the patient profile.

Here you can view information about a patient who is known to be following a gluten-free diet. Section content is only displayed if patient is signified as following a gluten-free diet.

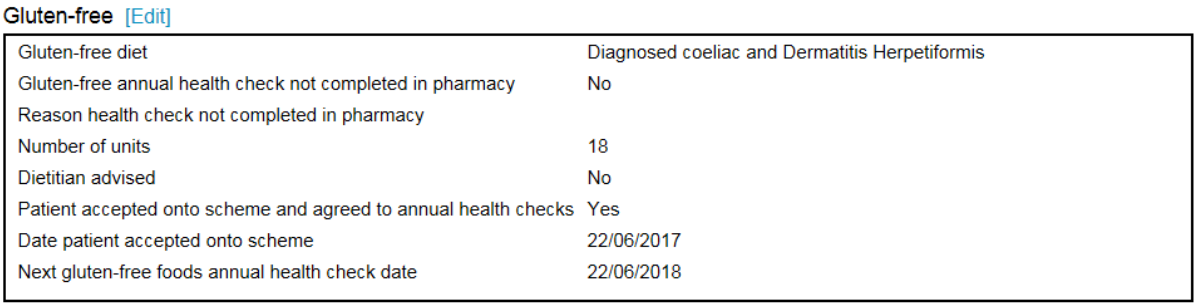


Figure 6-18: View Gluten-free information

6.5 Maintain gluten-free information

To maintain Gluten-free information select “Edit” link next to the “Gluten-free” heading on the Patient profile.

Use this section to record information about a patient who is known to be following a gluten-free diet. Section content is only displayed if patient is signified as following a gluten-free diet.

See also section 12.9 “Gluten-free reports”

Page Options	Guidance
Gluten-free diet	Options are: • Not Recorded *(default option)* • No • Diagnosed coeliac • Diagnosed coeliac and Dermatitis Herpetiformis • Dermatitis Herpetiformis • Undiagnosed
Gluten-free annual health check not completed in pharmacy	This option is selected if the annual health check is not required to be completed in the pharmacy
Reason Gluten free annual health check not completed in Pharmacy	Only displayed if the checkbox above is selected. Possible reasons are: • Patient is under 16 years old • Patient is in first year of treatment • Patient has Dermatitis Herpetiformis diagnosis and does not have Coeliac Disease diagnosis • Patient has Coeliac Disease CD review by another healthcare professional • Patient is housebound • Patient refuses to have a review (Inform GP) • Other (Please comment)

Number of units	
Dietitian advised	
“Patient acceptance onto Gluten-free foods scheme”	There are two steps that must be completed to signify in PCR that the patient has been accepted onto the Gluten-free foods scheme: • Patient accepted onto scheme and agreed to annual health checks (this checkbox must be ticked) • Date patient accepted onto scheme (a date must be entered)
Date of next Gluten-free foods annual health check	This date is set as part of the completion process for a Gluten-free foods annual health check. It can also be changed here in the patient profile.

6.6 Care issues

The pharmaceutical care plan is progressively built using pharmaceutical care issues that are identified for a patient. The PCP has a section for entering care issues. You also record the desired outcome for the care issue, any actions required to deliver the outcome, the status of the outcome and apply a review by date to each outcome.

The following types of care issue exist:

- Standard
- Stage 1 medication review
- High risk medicine
- New medicine
- Gluten-free
- Smoking cessation

Note: *Standard care issues can be created (ad hoc) from the patient home. All other care issues must be created from within their corresponding assessment type.*

6.6.1 Create a standard care issue

- Click on the ‘Review’ link, (Figure 6-19) in the Care Issue Section of the patient home page,

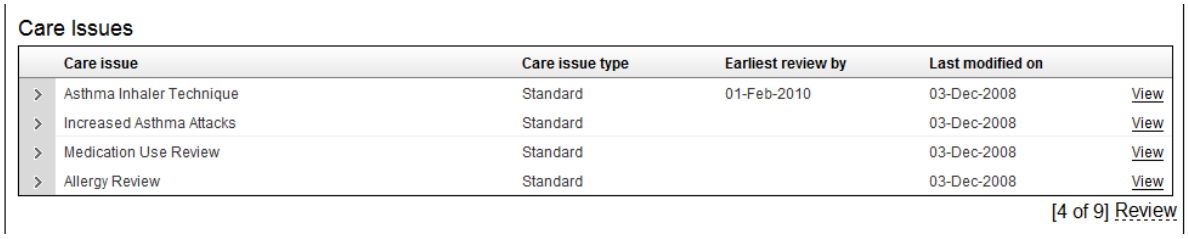


Figure 6-19: Care issues

- The care issues review screen is displayed (Figure 6-20)

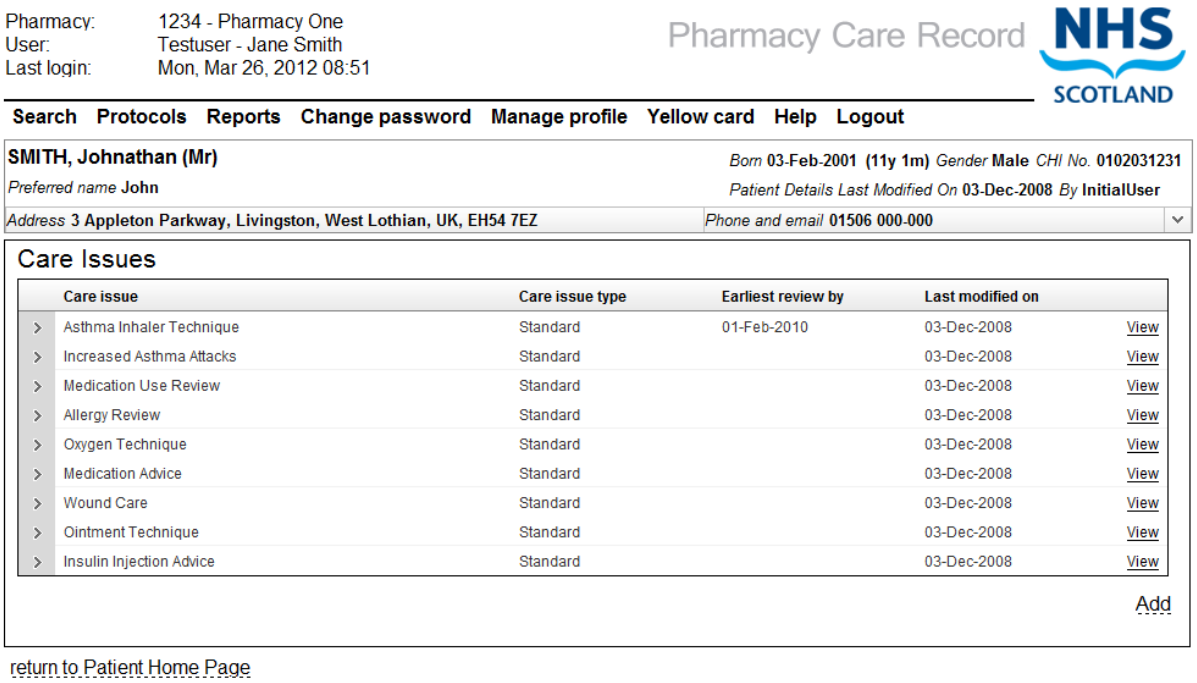


Figure 6-20: Care issues review screen

- Select the “Add” link from the care issues review screen, the care issue edit page is displayed.
- Enter a description of the care issue (Figure 6-21)

User options

- Select “Save” – the care issue description will be saved, the Care Issue description and associated Care Issue Outcome information will be displayed (Figure 6-22); or
- Select “Cancel” – no changes will be saved; the care issues review screen will be displayed (Figure 6-20)

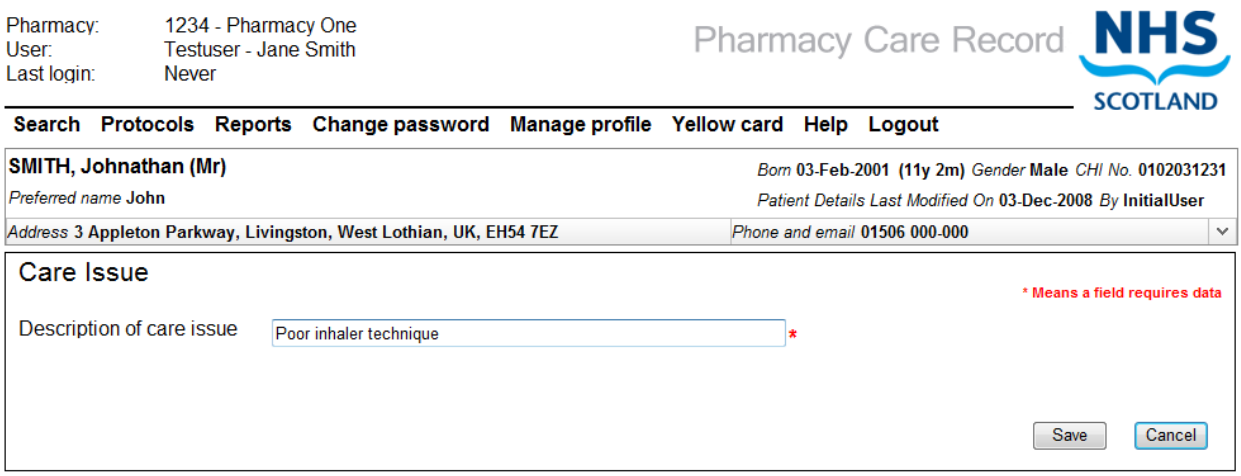


Figure 6-21: Add care issue description

6.6.2 Create a care issue outcome associated with a standard care issue

Click the “Add” link on the care issue detail page (Figure 6-22)

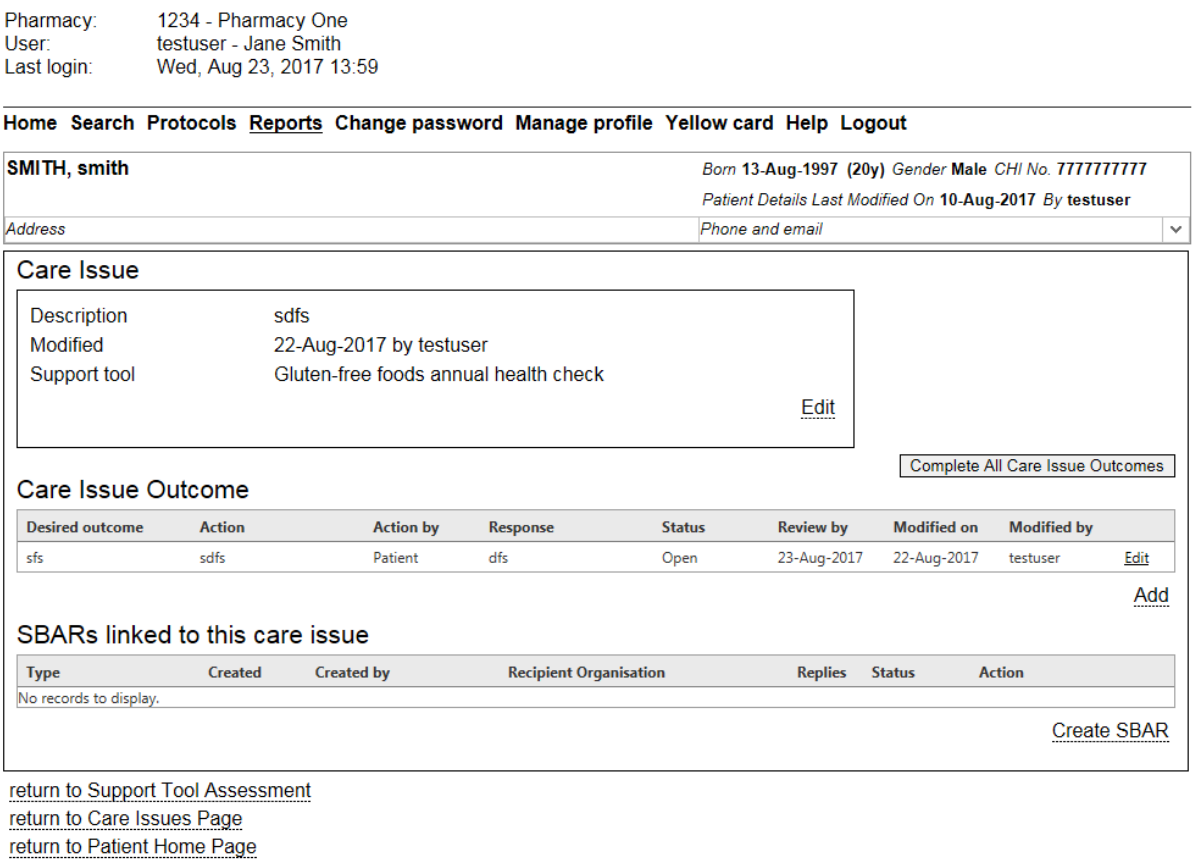


Figure 6-22: Care issue detail page

- The care issue outcome review page is displayed (Figure 6-23)

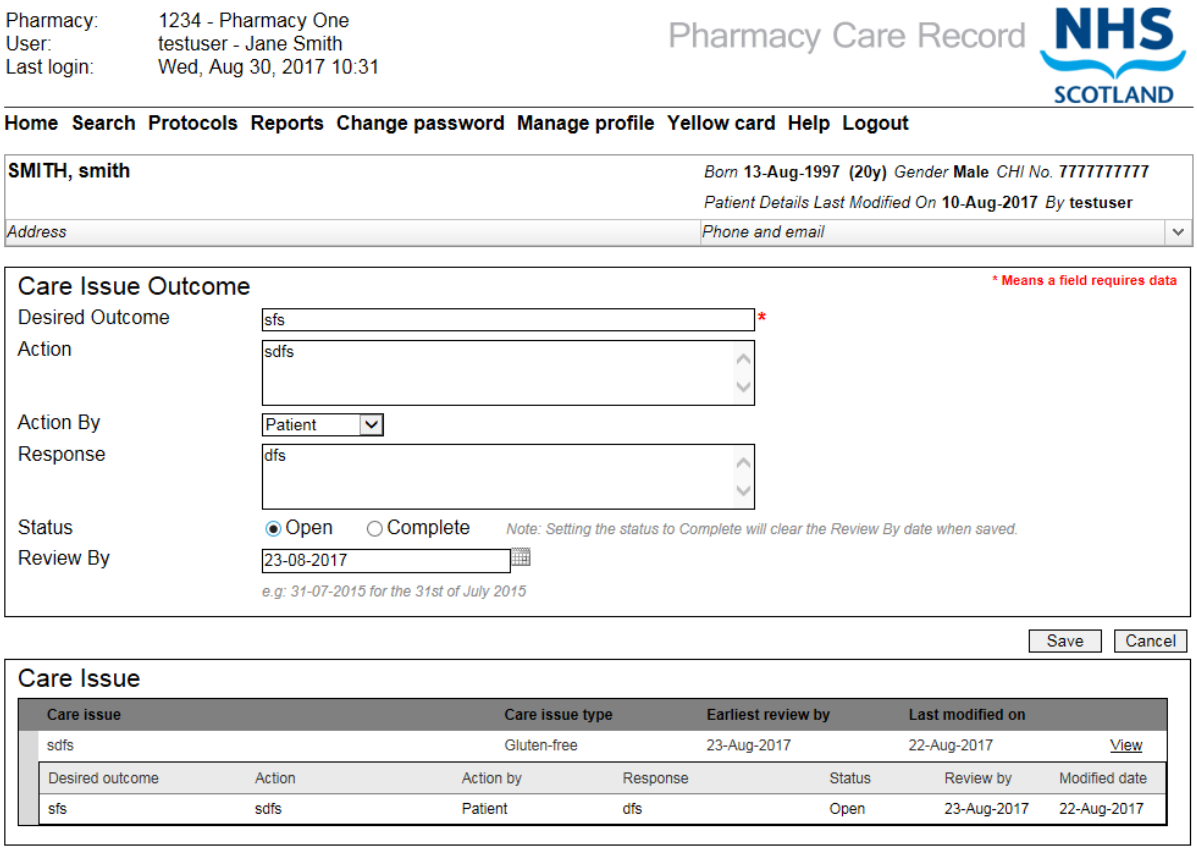


Figure 6-23: Care issue outcome

- Enter details for Desired outcome, action by, response, status, review by.

User Options

- Save – save changes and associate care issue outcome with care issue; or
- Cancel – the care issues review screen will be displayed

To set the status of a care issue outcome for a standard care issue to complete:

- Select the “Complete” radio button
- Select the “Save” button, the system will navigate to the care issue detail page (Figure 6-22)

***NOTE:** When the status is set to complete and then saved, the “Review by” date will be cleared once the care issue outcome has been saved.*

Returning to the patient home page will display a summary of the care issue you have created. (Figure 6-24)

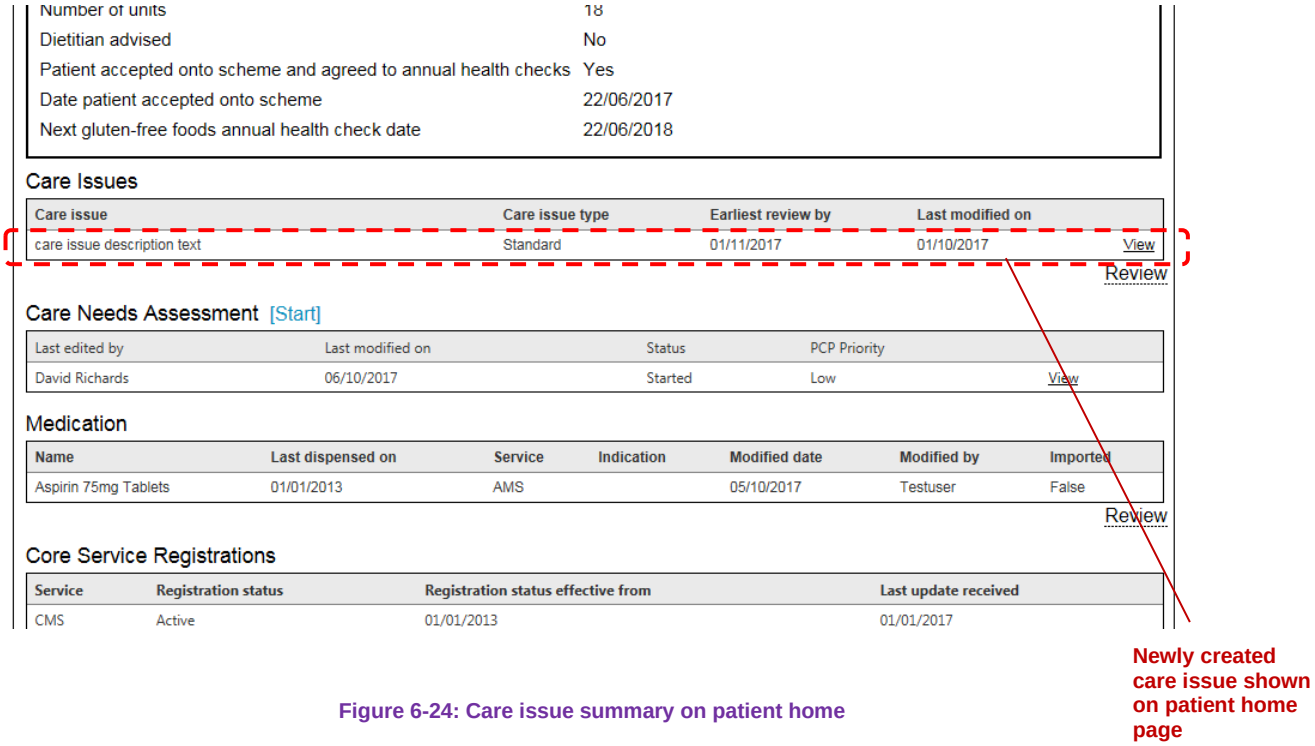
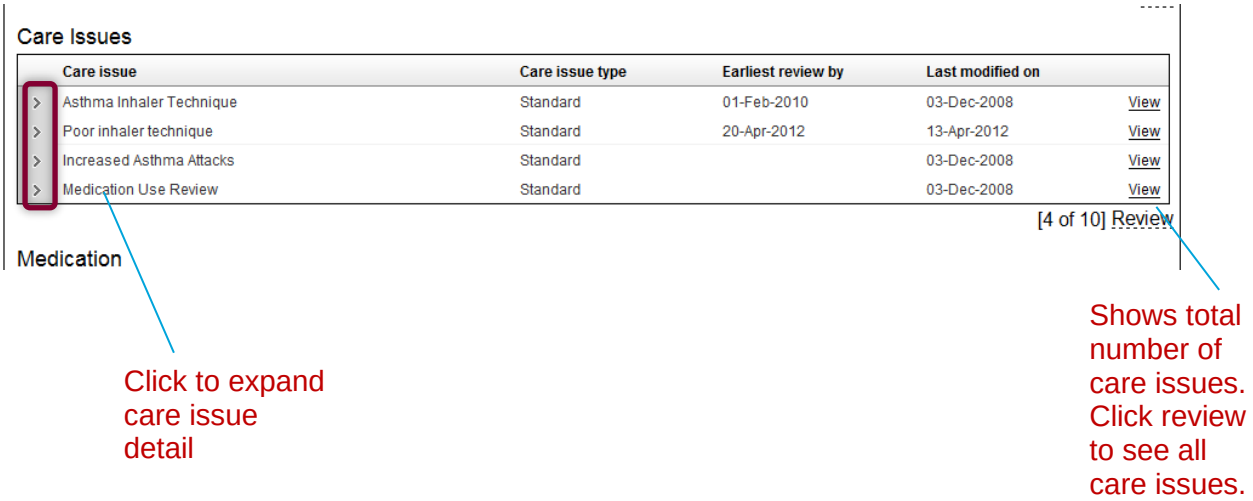


Figure 6-24: Care issue summary on patient home

Note: *Care issues are ordered by earliest review date if present, then by last modified date.*



6.6.3 Care issues housekeeping

In PCR version 13.1, the function to complete all care issue outcomes has been added to the view care issue page.

This function can be used to maintain older information where it is known that these outcomes are no longer valid.

To complete all care issue outcomes associated with a care issue:

- Select the “Complete all Care Issue Outcomes” Button
- The “Care issues review” page is displayed (to allow selection of another care issue to perform housekeeping on)

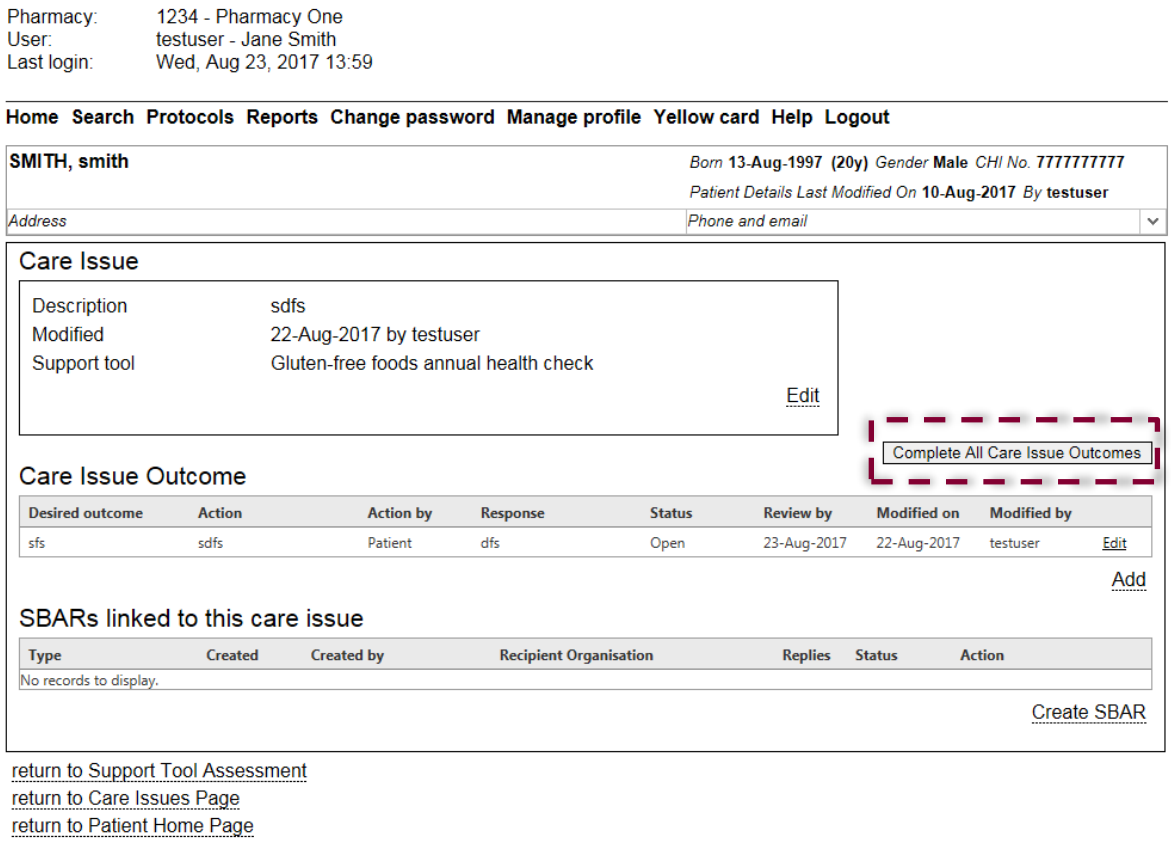


Figure 6-25: Complete All Care Issue Outcomes

6.7 Stage 1 medication review

(Formerly known as “Care needs assessment”)

6.7.1 Overview

The stage 1 medication review is used to record information about a patient’s immediate care needs.

The assessment is started from a link on the patient home and flows from one single question page to a summary page, the main navigation routes are illustrated in Figure 6-26.

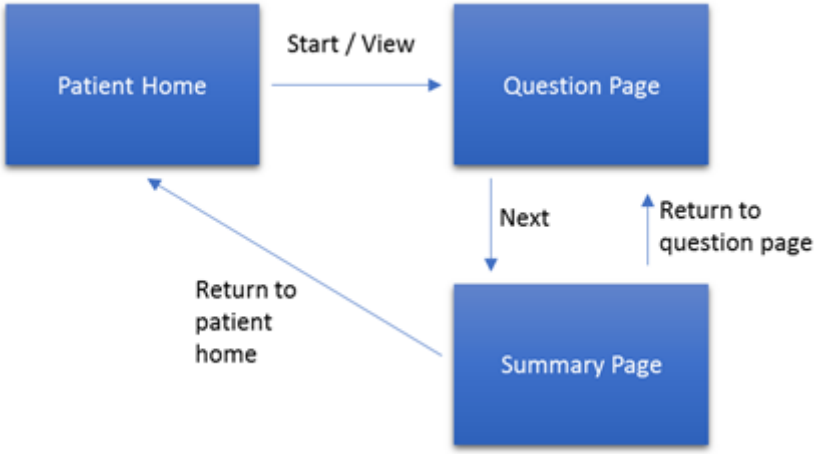


Figure 6-26: Stage 1 medication review page flows

Depending on the selection made on the question page for the questions 1-7, a prepopulated potential care issue may be highlighted for the question on the summary page. The table below shows the possible options for each question and which response will trigger a potential care issue.

Q. No.	Question text	Possible option	Care issue “trigger”
1	Can the patient tell you what medical conditions the have or have had?	Yes; No	A “No” response
2	Can the patient tell you the names of the medications they take for their condition(s) and how they take them?	Yes; No	A “No” response
3	Does the patient ever forget or choose not to take their medication?	Yes; No	A “Yes” response
4	Does the patient know what to do if they miss a dose of their medication?	Yes; No	A “No” response

5	Does the patient experience any side effects from their medication?	Yes; No	A “Yes” response
6	Can the patient tell you what is important to them in terms of managing their medication?	Yes; No	A “No” response
7	Does the patient have regular blood tests /check-up / reviews?	Yes; No	A “No” response
8	Is the patient suitable for serial prescribing?	Yes; No; Already initiated	N/A
9	What is the patient’s PCP Priority?	High; Medium; Low; Currently not required	N/A

The PCP Priority was previously set on the patient profile in versions of PCR prior to version 13.1; it now forms part of the Stage 1 medication review.

6.7.2 Start a stage 1 medication review

To start a stage 1 medication review, select the “Start” link from Patient Home, Figure 6-27.

Figure 6-27: Patient Profile “Start” Stage 1 medication review

The stage 1 medication review question page will be displayed, Figure 6-29.

It is not possible to start a stage 1 medication review if there is another stage 1 medication review for the same patient in an “Open” state.

6.7.3 View an existing stage 1 medication review

To view an existing stage 1 medication review, select the “view” icon, Figure 6-28

Figure 6-28: Patient home list of stage 1 medication reviews

The stage 1 medication review question page will be displayed, Figure 6-29.

6.7.4 Question page

The stage 1 medication review question page is accessible from the “Start” or “View” links from the patient home.

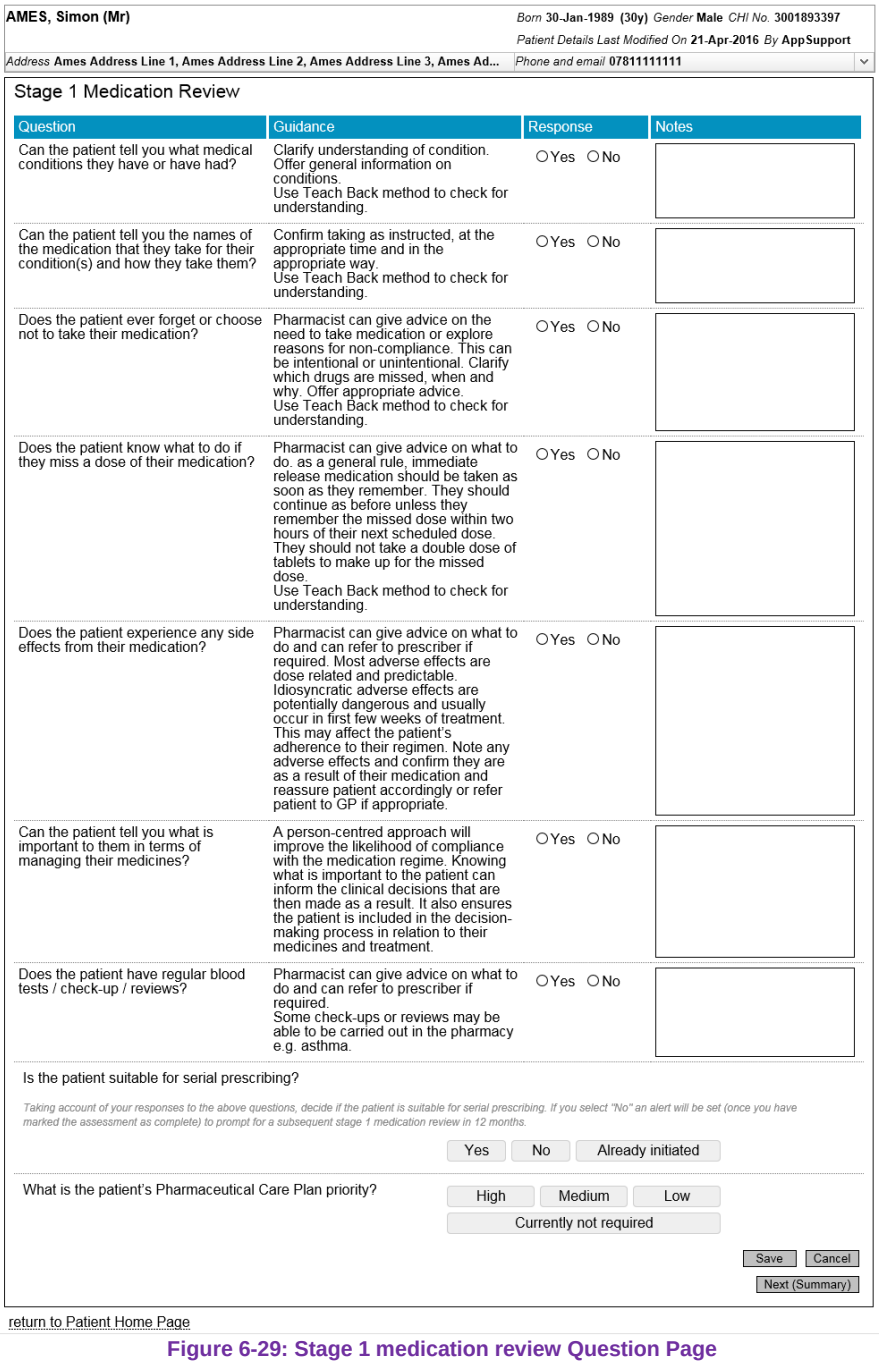


Figure 6-29: Stage 1 medication review Question Page

From this page a response can be recorded for each of the 9 questions by selecting the radio buttons for questions 1-7 and selecting the appropriate option for question 8, “Is the patient suitable for serial prescribing” and question 9, What is the patient’s PCP Priority?”. The questions are:

- Can the patient tell you what medical conditions they have or have had?

- Can the patient tell you the names of the medication that they take for their condition(s) and how they take them?
- Does the patient ever forget or choose not the take their medication?
- Does the patient know what to do if they miss a dose of their medication?
- Does the patient experience any side effects from their medication?
- Can the patient tell you what is important to them in terms of managing their medicines?
- Does the patient have regular blood tests/ check-up/ reviews?
- Is the patient suitable for serial prescribing?
- What is the patient's Pharmaceutical Care Plan priority?

For questions 1-7, select 'Yes' or 'No'.

For question 8, select one of the following: ''Yes', 'No', 'Already initiated'.

For question 9, select one of the following: 'High', 'Medium', 'Low', or 'Currently not required'

Guidance text is associated with each question and notes can be entered for each question.

This page cannot be edited once the stage 1 medication review has been completed.

Navigation links

There is one navigational link at the bottom left of the page

- Return to Patient Home Page

Page functions

The following buttons are located at the bottom right of the page

- Save – saves any changes made on the page
- Cancel – changes made since last save are lost and navigates to the patient home
- Next (Summary) – saved changes and navigates to summary page

When satisfied with the information you have entered, select "Next (Summary)". The summary page is displayed, Figure 6-30

6.7.5 Summary page

The stage 1 medication review summary is shown in Figure 6-30.

The summary page displays all question and responses provided (Question text and selection made by user on question page), Potential care issues (determined by question response), Notes (optionally entered on question page), Care issues associated with the assessment (created from potential care issues using pre-determined text, and a Completion section.

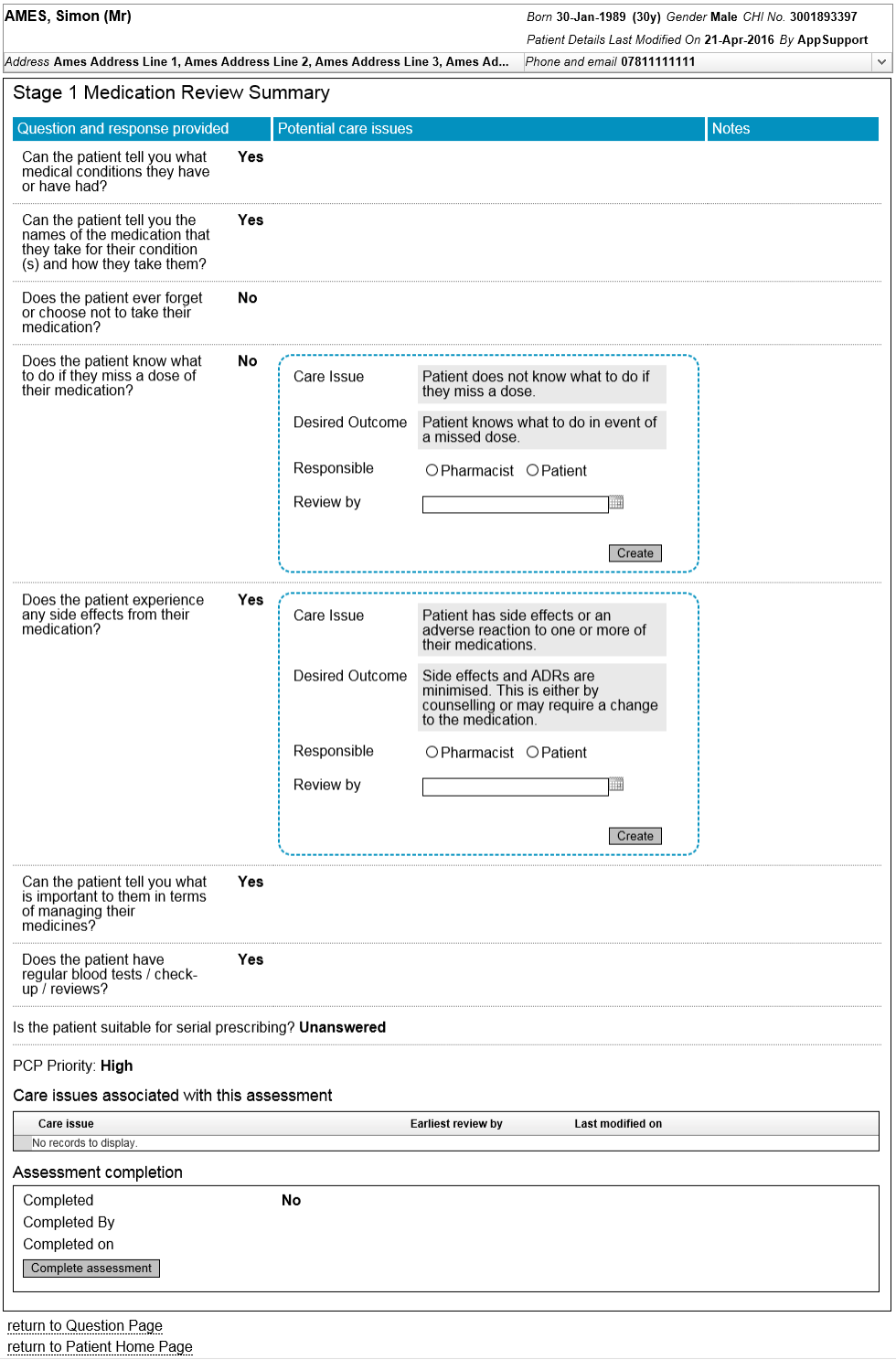


Figure 6-30: Stage 1 medication review Summary Page

Questions and response provided

A read only summary of the questions and responses made. If a question has not been answered “Unanswered” is shown.

Potential care issues

If the question response indicates a potential care issue the care issue, (with predetermined text) will be shown.

To create care issue, select the responsible option as either pharmacist or patient, enter review by date and click “Create”. The care issue will appear in the “care issues associated with this assessment” list.

(On creation of the care issue the “Create” button will be replaced with Modified on and Modified by information.)

Notes

Read only notes entered on the question page.

Care issues

List of care issues that have been created from the identified “Potential care issues”

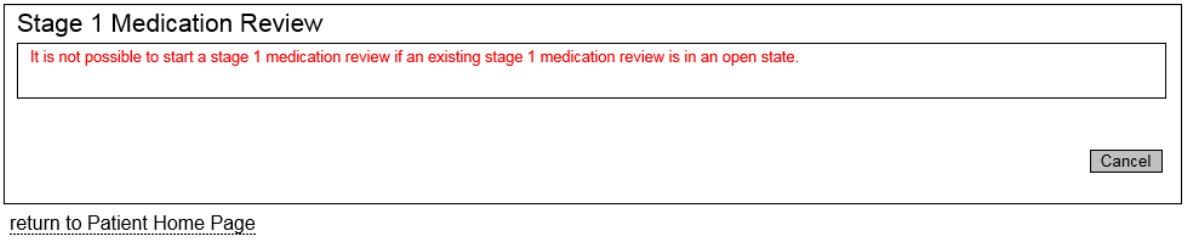
Completion

Function to complete the assessment. It is not possible to complete the assessment if unanswered questions exist. On completion the completion status, completed by, completed on information is populated.

6.7.6 Error messages

6.7.6.1 “It is not possible to start a stage 1 medication review…”

If another stage 1 medication review is in an open state when the “Start” link is selected. The following page and message “it is not possible to start a stage 1 medication review if an existing stage 1 medication review is in an open state” is displayed in place of the question page.



6.7.6.2 Summary page (Create care issue)

A “Review by” date is not present when the “Create” button is selected

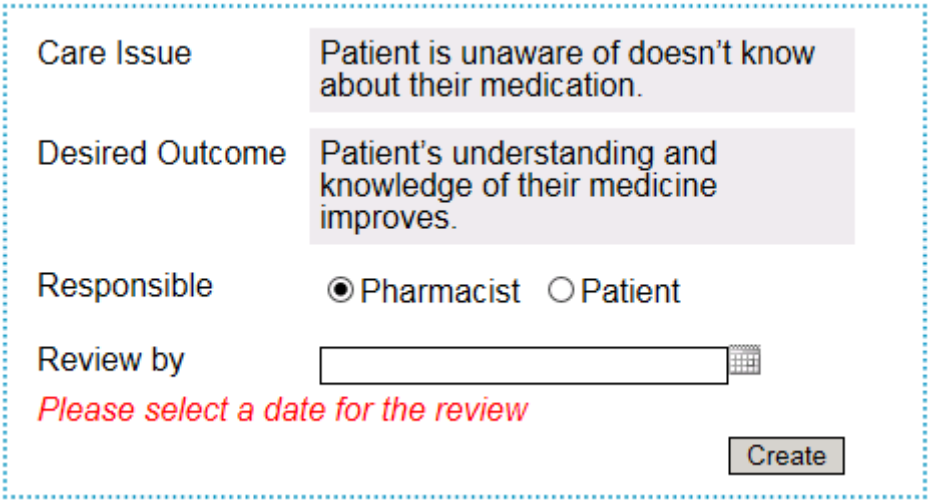


Figure 6-31: Review by date not present error

6.8 Stage 2 medication review

6.8.1 Overview

A stage 2 medication review can be created, maintained and viewed by a Pharmacist user role only.

A stage 2 medication review consists of 5 questions that steer the pharmacist user towards reviewing key aspects of their medication. The pharmacist can choose to obtain the patients medication history from the PMR or refer to medication that has been imported or added to PCR. Guidance text is displayed for each question. Depending on the response (Yes or No) a potential care issue may be highlighted on the summary screen.

Seq.	Question	Question-specific Guidance	Trigger	Care Issue	Care Issue Outcome
1	**Prescription Intervals** Are there any medications being prescribed at different intervals?	Synchronisation and alignment helps with serial prescription management and reduces waste. Check all medication is prescribed for the same number of days' treatment.	A "Yes" response	Medications are prescribed at different intervals	Align medications to ensure they are all prescribed for the same number of days' treatment.
2	**Duplicate Medications** Are there any medications that are considered to be duplicates?	Duplicate medications can lead to double-prescribing and overdose. Removing duplicates reduces waste and aligns medication.	A "Yes" response	Duplicate Medications exist	Remove duplicate medications.
3	**Medications not ordered recently** Are there any medications that have not been ordered recently?	Use clinical judgement to determine "recently". Patient may no longer require the medication, have suffered from adverse reactions or prescriber discontinued but did not remove from the prescription. The pharmacist should have a discussion with the patient to determine the reason for the medication being not ordered. Any clinical concerns or issues should then be directed to the GP before any items are requested to be removed from the repeat list.	A "Yes" response	One or more medications have not been ordered recently.	Identify possible care issues to follow up.
4	**Frequency of ordering** Are there any medications that have been ordered more frequently than expected?	There is no definitive time frame as each class or type of medication and its use may vary. As a general rule, suggestions to the practice to remove items	A "Yes" response	One or more medications have been ordered more frequently than expected	Pharmacist works with patient to determine why and agree correct ordering frequency.

		that have not been ordered within the previous 12 months should be followed but there needs to be exceptions. Most practices will have a list of drugs that require flagging up to GP's before removal as patient will need to be contacted. E.g. BP meds, warfarin, statin, antiplatelets, preventer inhalers if not ordered for 3 months. This would also constitute a care issue and should be recorded as such by the pharmacist.			
5	**Missing or ambiguous directions** Are there any medications which have missing or ambiguous directions?	Reinforces the patients understanding of how to take their medicines if doses are correct.	A "Yes" response	Missing or ambiguous directions have been identified	Missing or ambiguous directions have been highlighted to the GP practice.

6.8.2 Start a stage 2 medication review (where medication has been imported or added to PCR)

(completing all question responses in sequence before navigating to the summary page)

To start a stage 2 medication review, select the “Start” link next to the “Stage 2 medication reviews” heading on the patient home, Figure 6-32.

Figure 6-32: Start a stage 2 medication review

If there is a stage 2 medication review in an open state it will not be possible to start a new review – an error will be displayed.

The “Select Source” page is displayed in its default state.

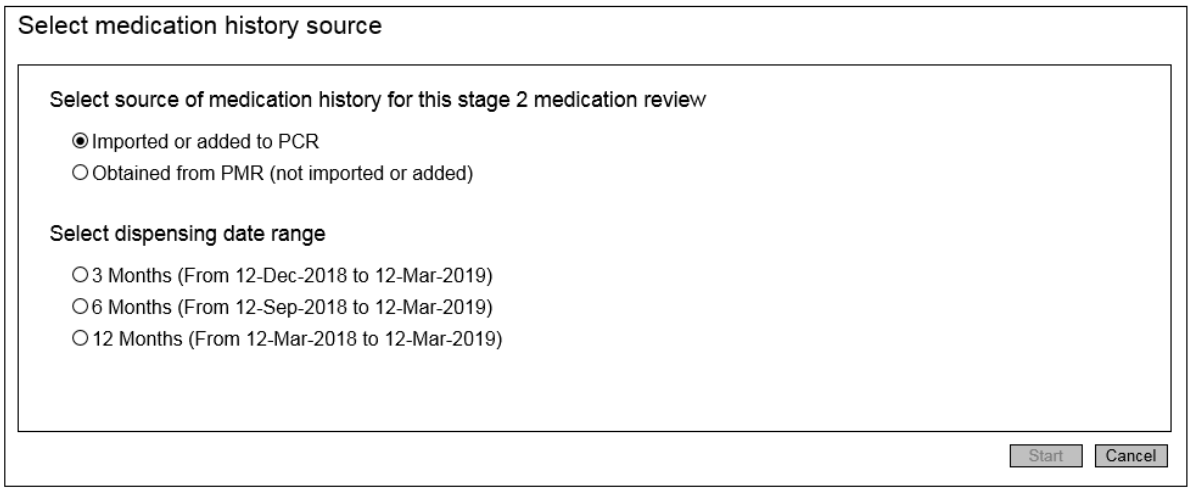


Figure 6-33

Select Imported or added to PCR (the dispensing date range radio buttons are enabled) and select a dispensing date range. [update screen]

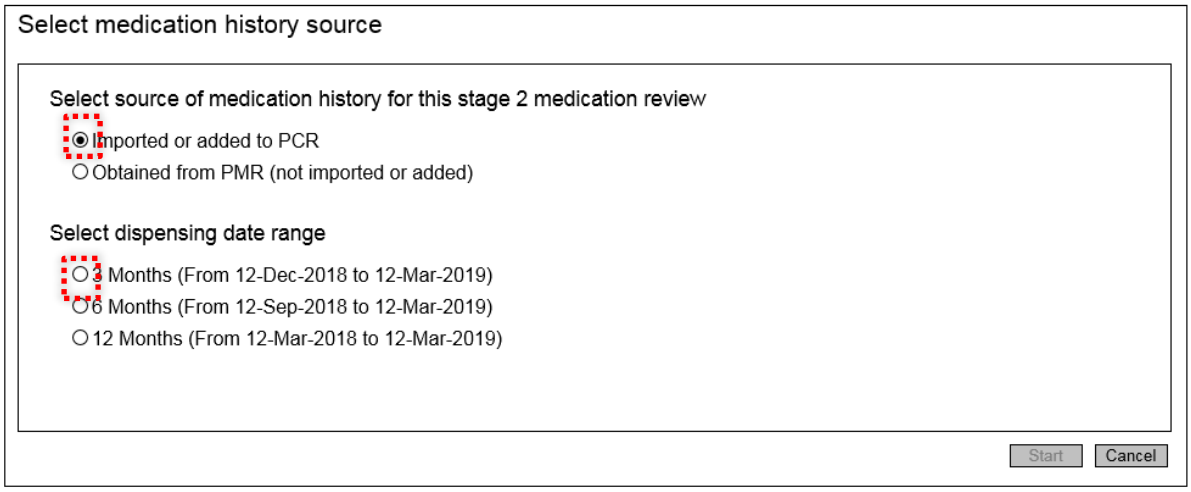


Figure 6-34

Medication displayed on each question page will be limited to the selected dispensing date range.

Select the start button. [update screen]

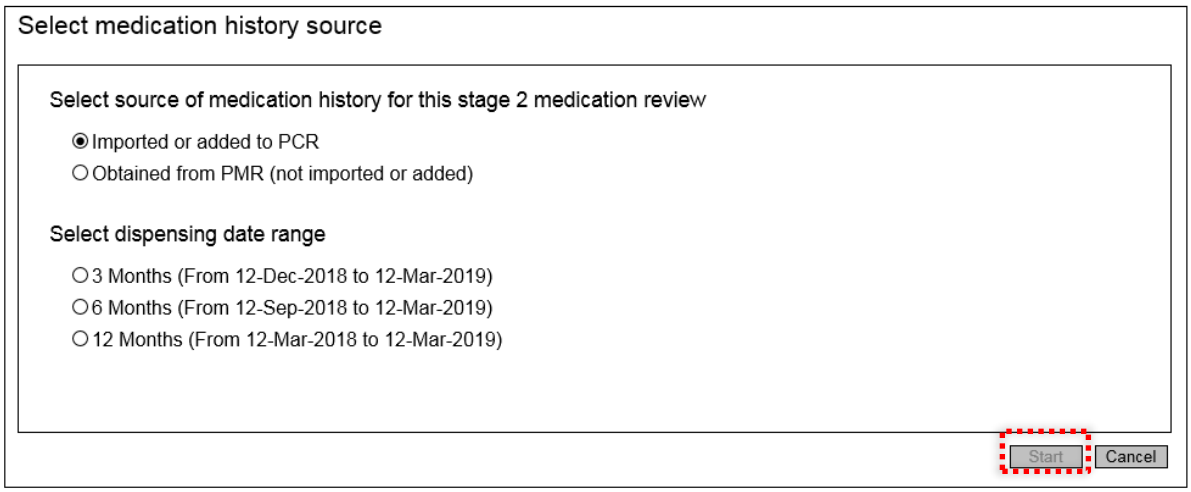


Figure 6-35

Question page 1 is displayed: **Prescription Intervals**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next” button.

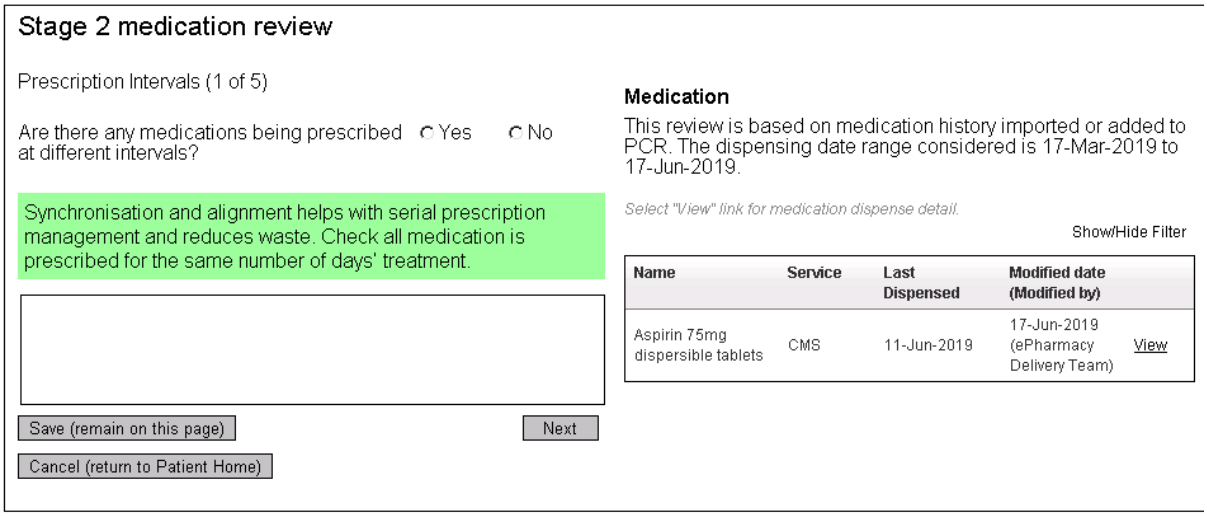


Figure 6-36

Question Page 2 is displayed: **Duplicate medications.** Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next Button.

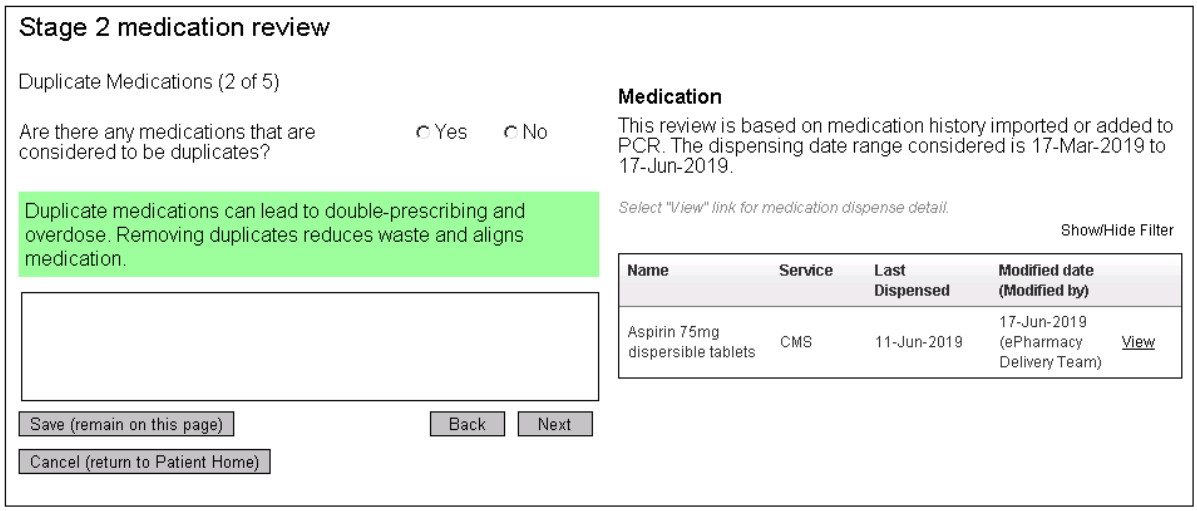


Figure 6-37

Question Page 3 is displayed: **medications not ordered recently**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next” Button.

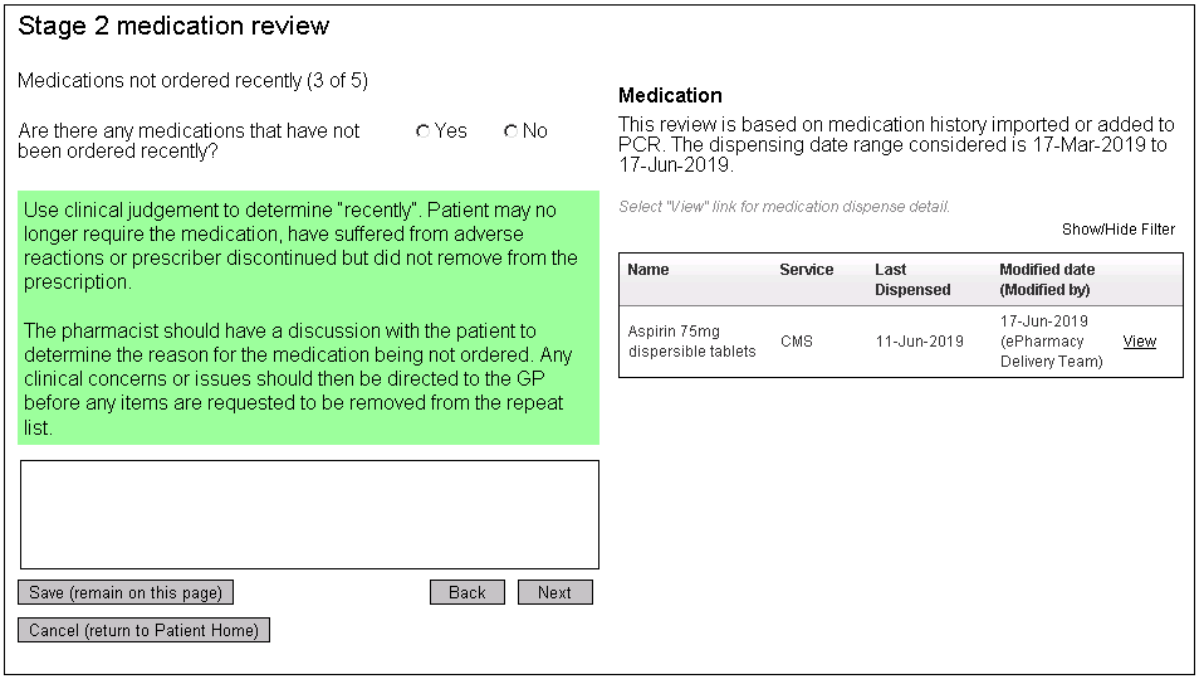


Figure 6-38

Question Page 4 is displayed: **Frequency of ordering**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next” Button.

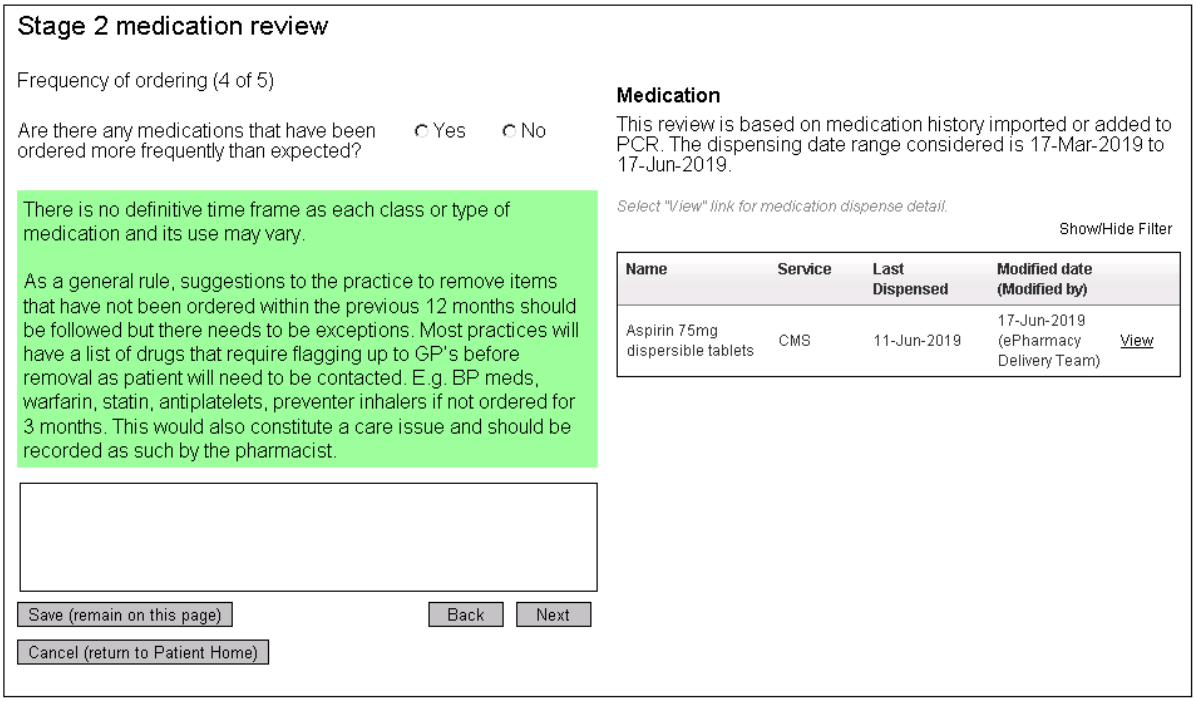


Figure 6-39

Question Page 5 is displayed: **Missing or ambiguous directions**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Summary” Button.

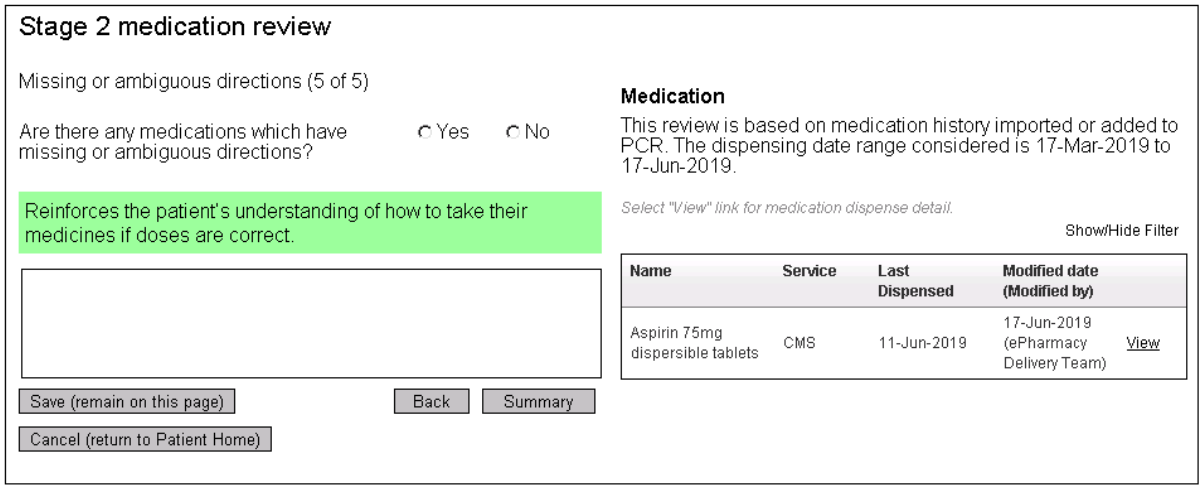


Figure 6-40

6.8.3 Start a stage 2 medication review (where medication has been obtained from PMR)

(completing all question responses in sequence before navigating to the summary page)

To start a stage 2 medication review, select the “Start” link next to the “Stage 2 medication reviews” heading on the patient home, Figure 6-32.

Figure 6-41: Start a stage 2 medication review

If there is a stage 2 medication review in an open state it will not be possible to start a new review – an error will be displayed.

The “Select Source” page is displayed in its default state.

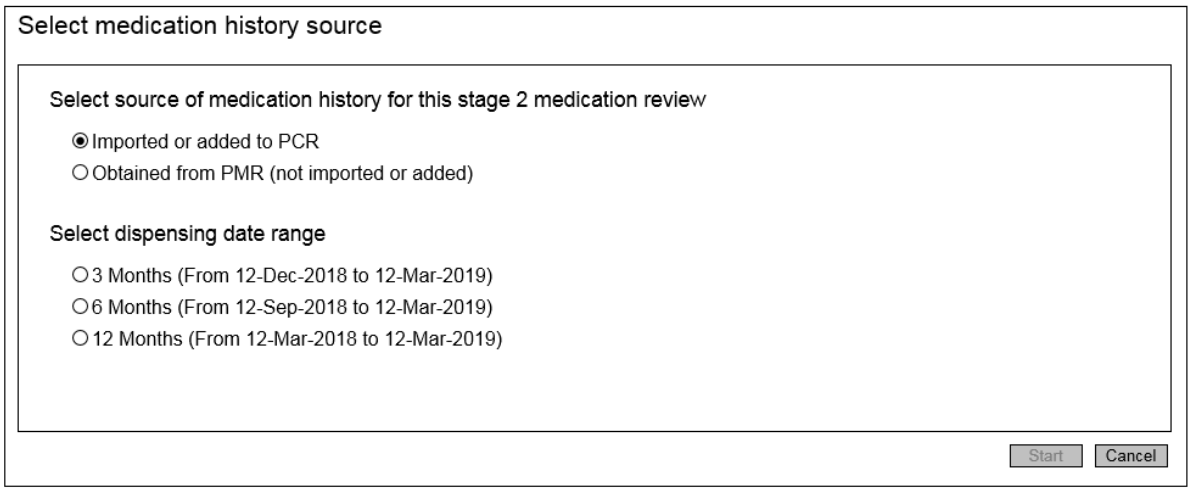


Figure 6-42

Select “Obtained from PMR (not imported or added)” The dispensing date range radio buttons are enabled. Select a dispensing date range.

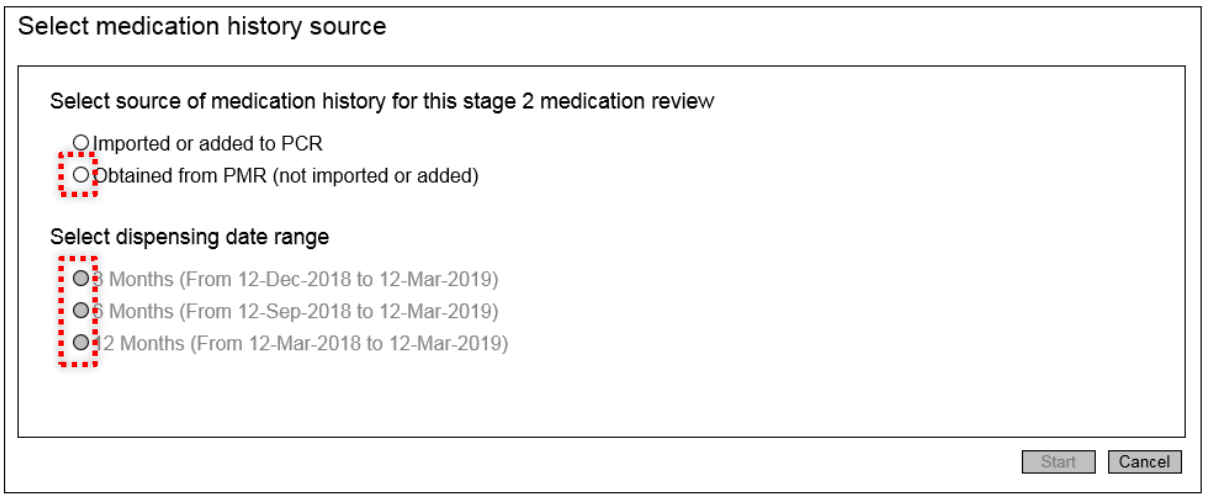


Figure 6-43

Medication displayed on each question page will be limited to the selected dispensing date range.

Select the start button.

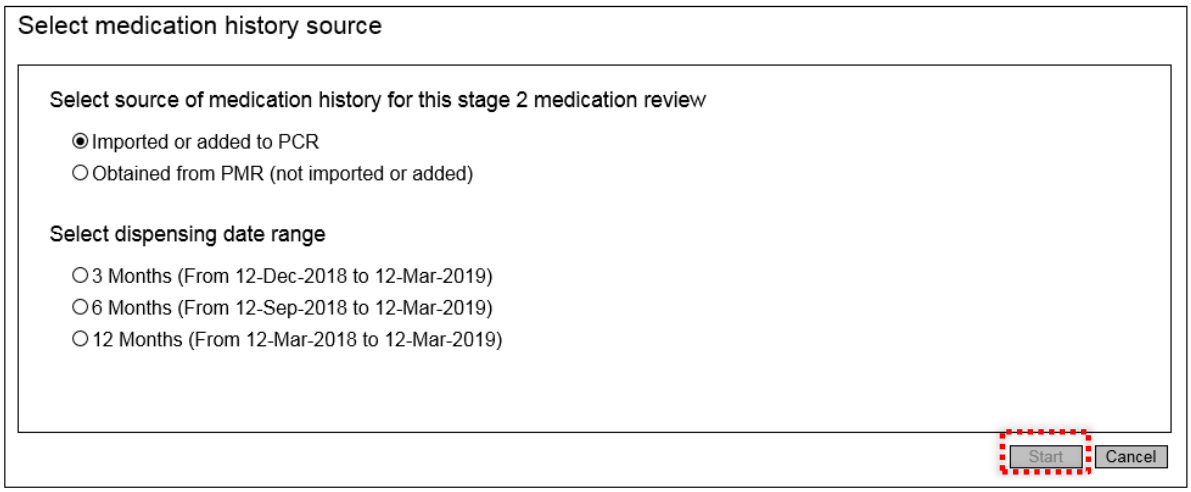


Figure 6-44

Question page 1 is displayed: **Prescription Intervals**. Read the question and associated guidance, enter a question response and enter any notes, if required. Select the “Next” button.

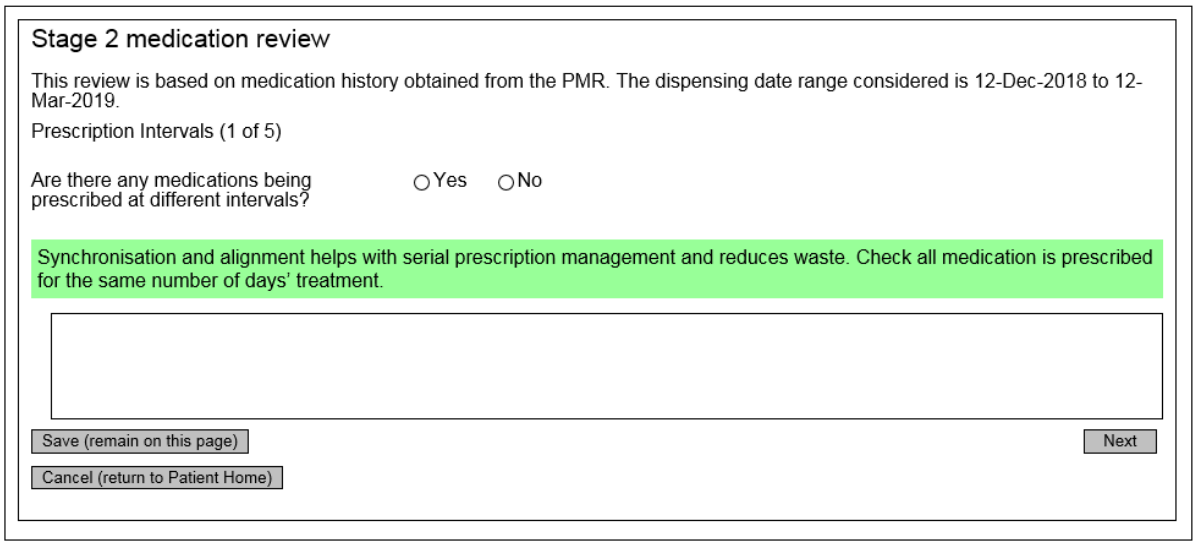


Figure 6-45

Question Page 2 is displayed: **Duplicate medications.** Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next Button.

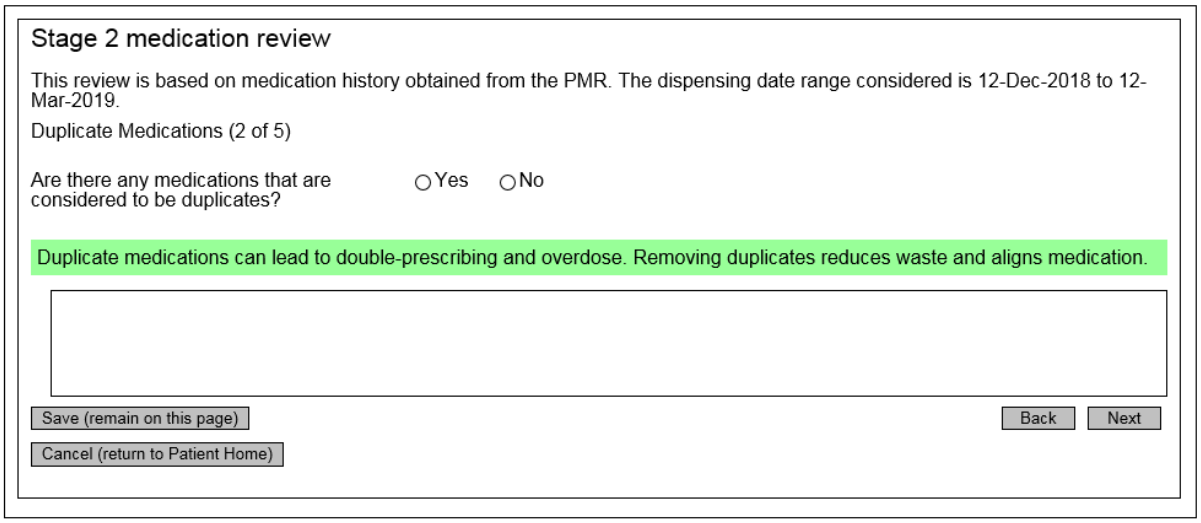


Figure 6-46

Question Page 3 is displayed: **medication not ordered recently**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next” Button.

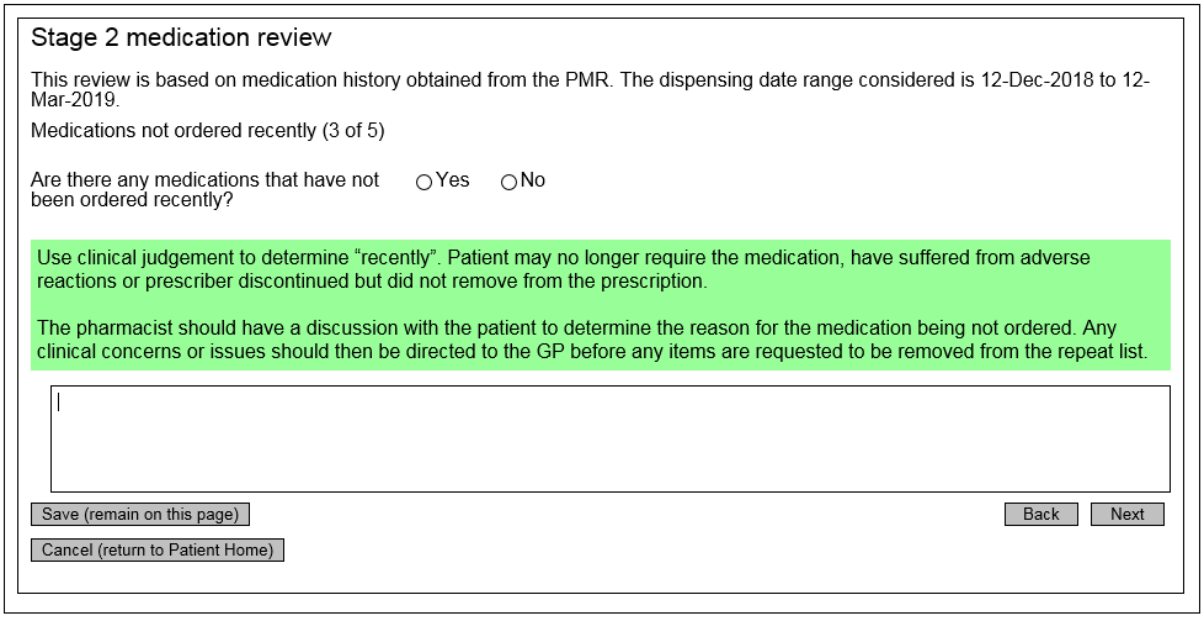


Figure 6-47

Question Page 4 is displayed: **frequency of ordering**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the “Next” Button.

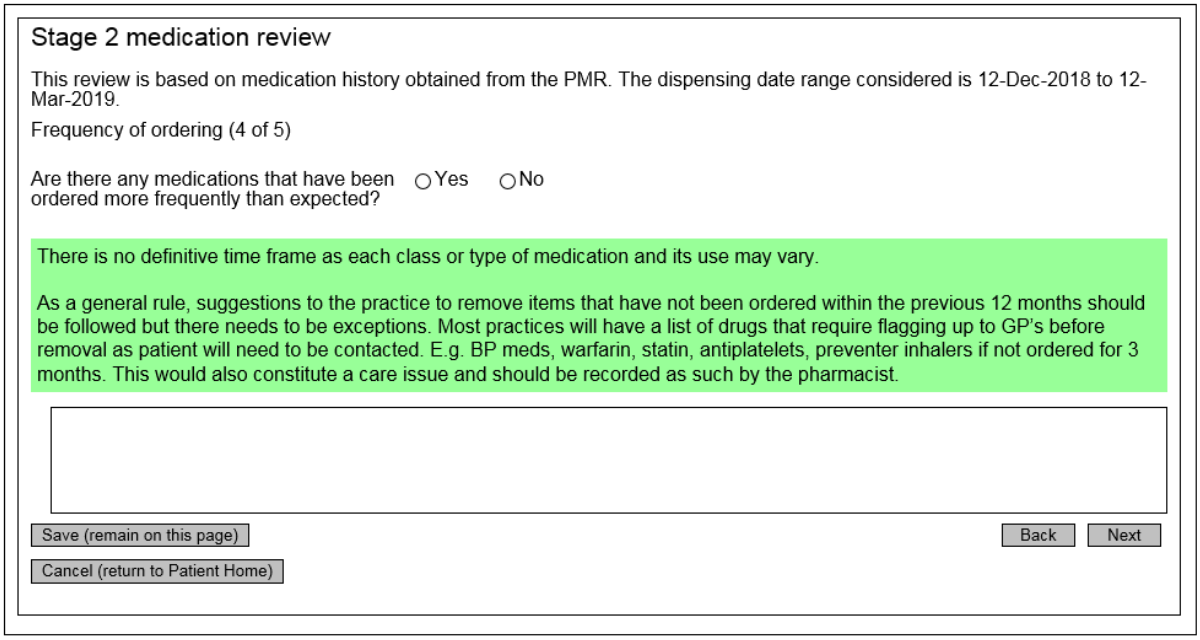


Figure 6-48

Question Page 5 is displayed: **missing or ambiguous directions**. Read the question and associated guidance, enter a question response and enter any notes, if required. Filter the medication if required. Select the "Summary" Button.

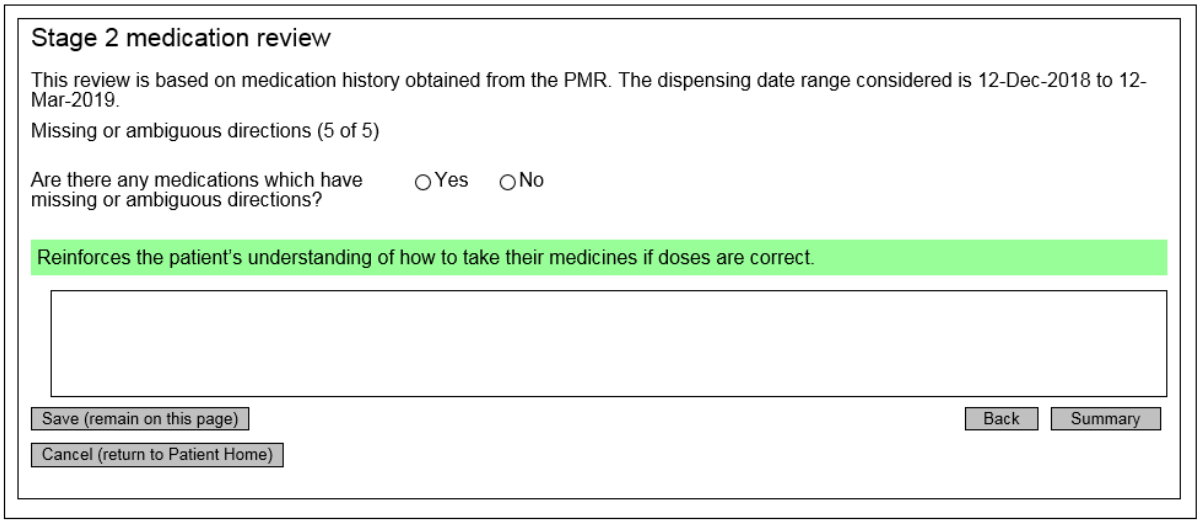


Figure 6-49

6.8.4 Create a care issue associated with a stage 2 medication review question

To create a care issue:

- Identify the care issue you want to create in the "potential care issues column on the summary page."
- Select option for "Responsible"
- Select "Review by date"
- Click the create button
- The care issue is created and displayed in the care issue grid on the summary page.

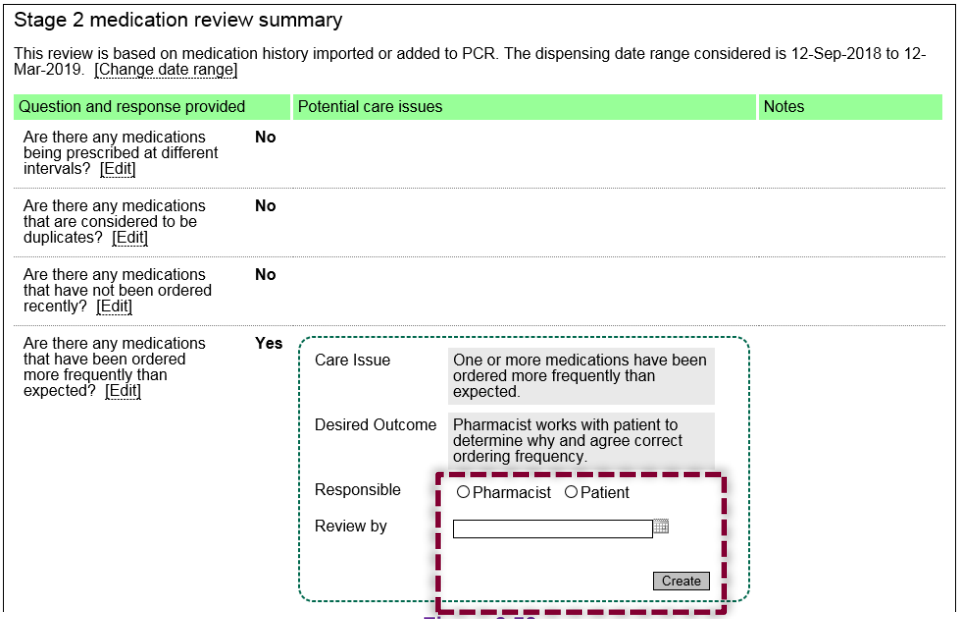
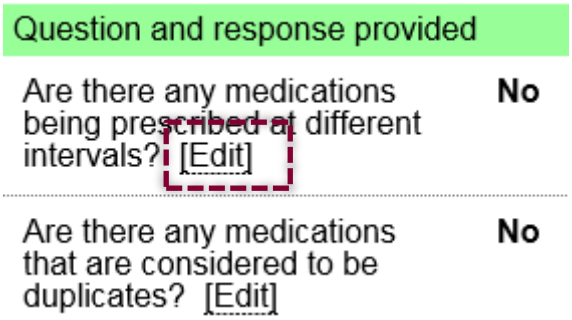


Figure 6-50

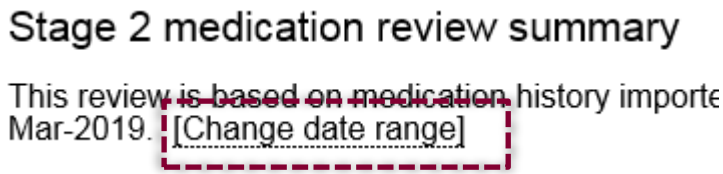
6.8.5 Navigate to a question page from the summary page

To navigate to a question page from the summary page select the “Edit” link next to the question in the “Question and response provided” column:



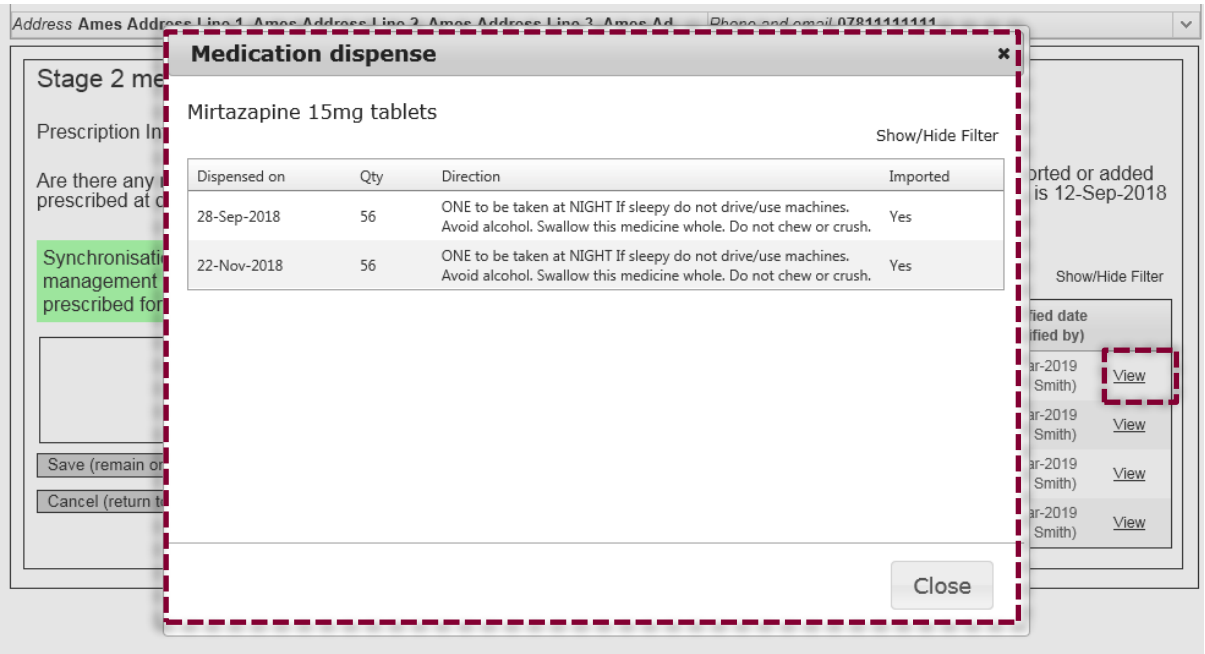
6.8.6 Change dispensing date range

To change the dispensing date range for an open assessment, select the “Change date range” link:



6.8.7 View medication dispense detail

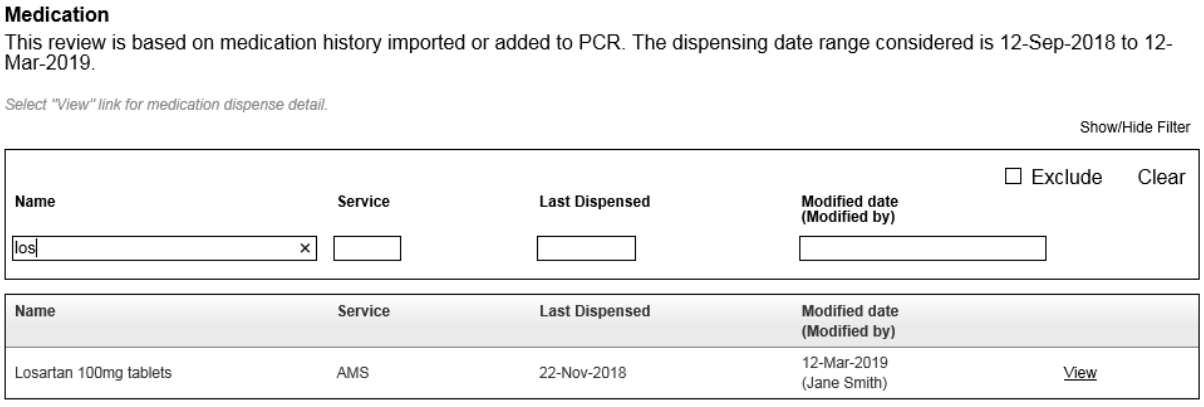
Where the medication source is imported or added to PCR, from any question page select the “view” link on the medication grid. The medication dispense information is displayed in a popup.



6.8.8 Filter medication

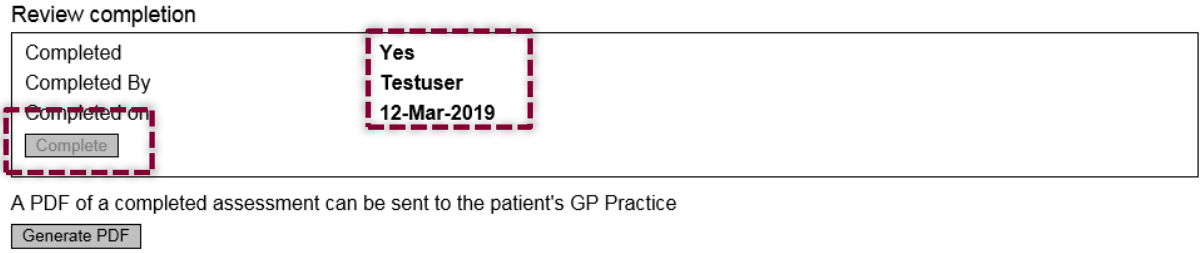
Applicable where medication source is imported or added to PCR.

On any question page or the summary page, select Show/Hide Filter. The filter is displayed. Type the text you want to filter on into any of the filter text boxes for each column. The filter is applied in real time.



6.8.9 Complete a stage 2 medication review

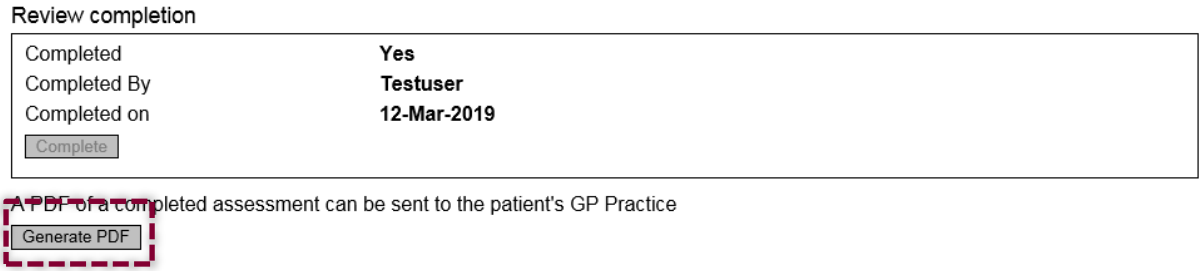
Select the complete button. The review is set to complete. Completed, Completed by and Completed on information is shown.



It is not possible to complete a review if any mandatory questions remain in an unanswered state.

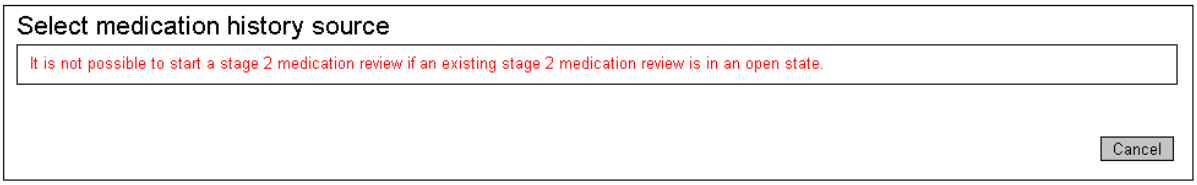
6.8.10 Generate a PDF of a completed stage 2 medication review

Select the “Generate PDF” button. The PDF is generated and can be saved to the local computer.

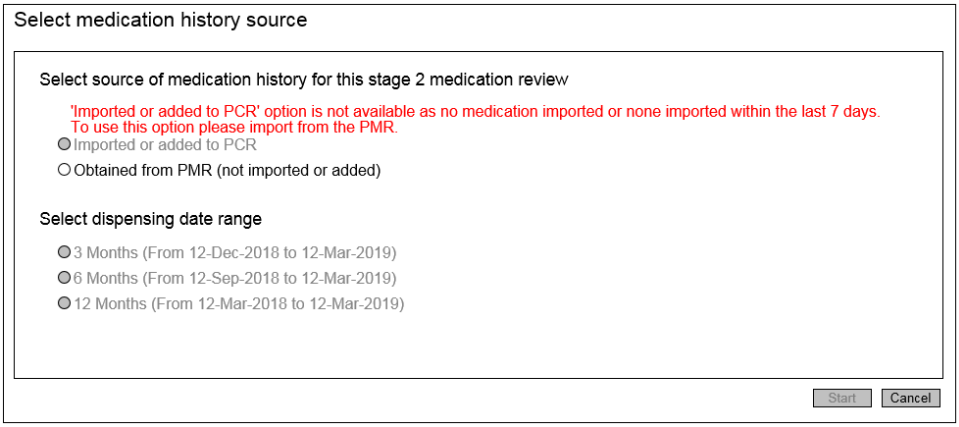


6.8.11 Error messages

6.8.11.1 “It is not possible to start a stage 2 medication review if an existing stage 2 medication review is in an open state.”



6.8.11.2 “‘Imported or added’ to PCR option is not available…”



6.9 Stage 3 medication review

Stage 3 Medication Review is a report-driven polypharmacy review. Stage 3 medication review functions are accessible to the pharmacist user role only.

6.9.1 Overview

A stage 3 medication review is a written report that concludes a pharmacist's assessment of the patient in relation to the following polypharmacy domains:

- Aims
- Need
- Effectiveness
- Safety
- Cost-effectiveness
- Person centred care

It is closely aligned to and references the following website and mobile app. resource:

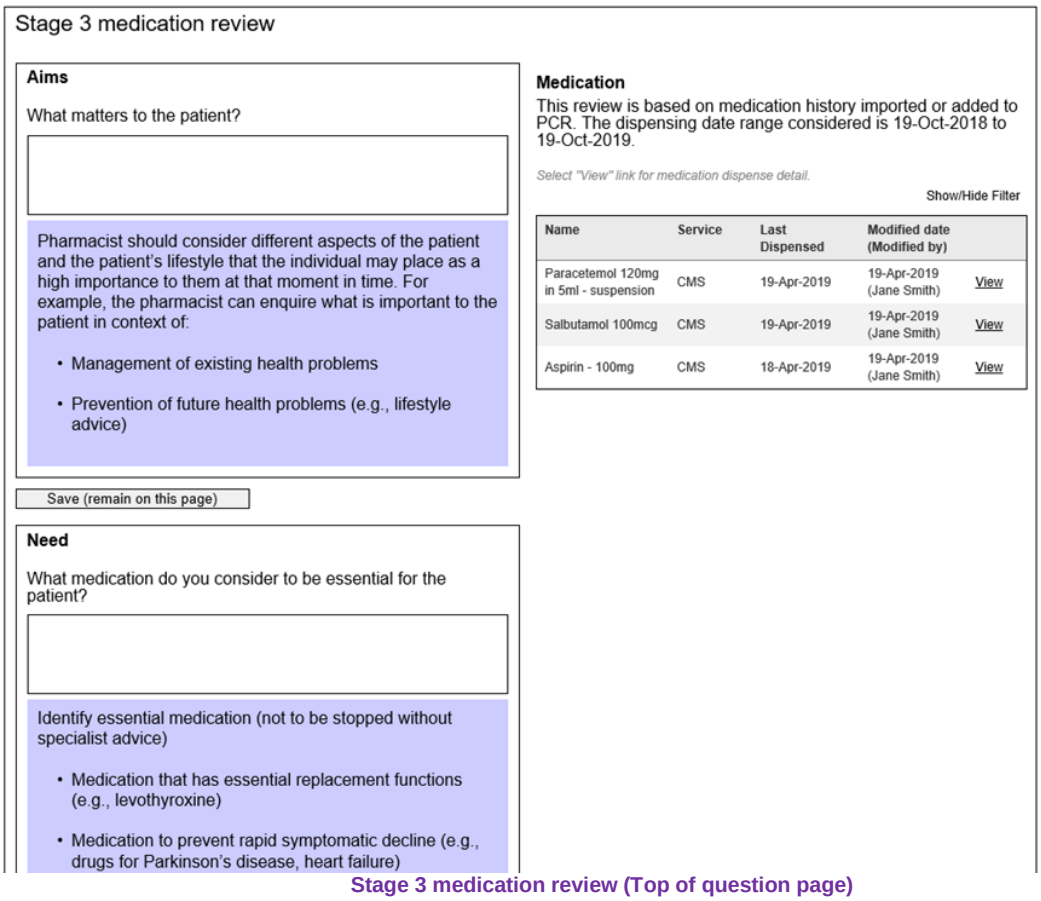
http://www.polypharmacy.scot.nhs.uk/polypharmacy-guidance-medicines-review/for-healthcare-professionals/

It differs from stage 1 and stage 2 medication reviews in as much as it is a written-report style as opposed to selecting a Yes/No response to a predefined question.

A Stage 3 medication review has the option to base the context of the review on medication history that has been "imported or added to PCR" or "obtained from the PMR". For the former, the imported or added medication, for the selected date range is displayed on the question page.

All questions are displayed on a single scrollable data entry page. There is an option to 'save (remain on this page)' after each question. This provides the pharmacist with the ability to regularly save their text.

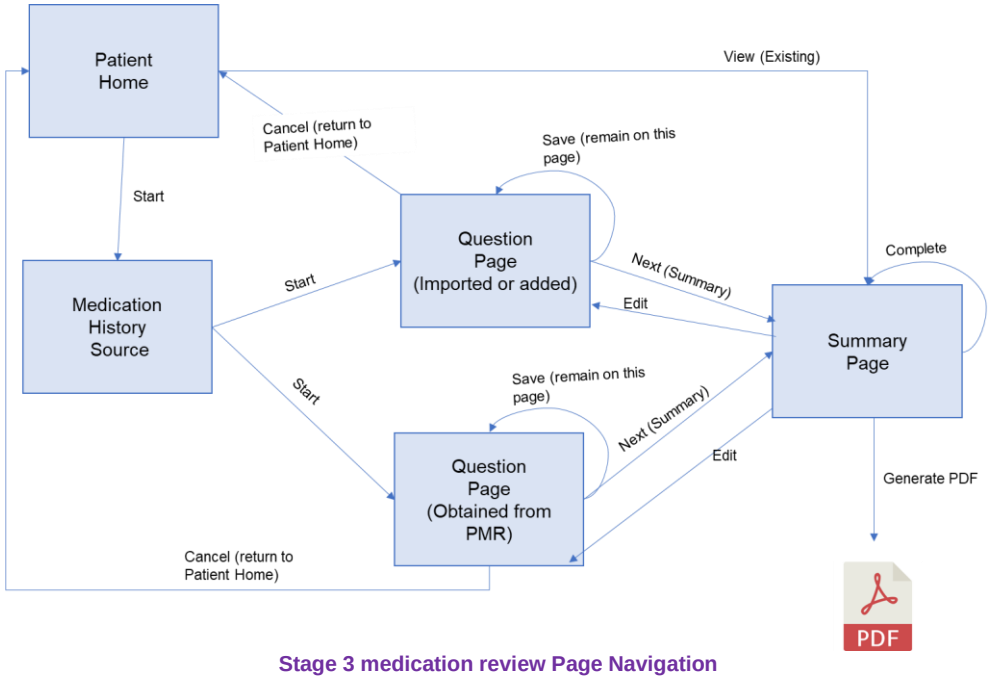
The screen below shows the top of the questions (data entry) page.



Stage 3 medication review (Top of question page)

6.9.2 Page navigation structure

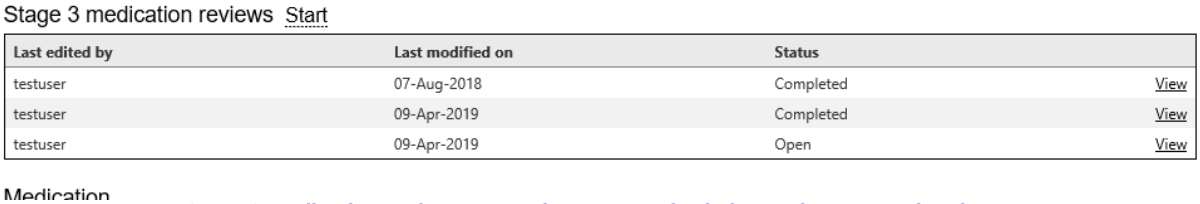
The page navigation for a stage 3 medication review is shown below. From the summary page, there is an option to generate a PDF summary of a completed assessment.



Stage 3 medication review Page Navigation

6.9.3 Patient Home summary of stage 3 medication reviews

A new function to start a stage 3 medication review and view existing stage 3 medication reviews" has been added to the patient home pharmaceutical care plan tab. This section also displays existing stage 3 medication reviews.


Stage 3 medication reviews Start

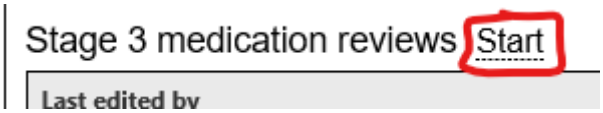
Last edited by	Last modified on	Status	
testuser	07-Aug-2018	Completed	View
testuser	09-Apr-2019	Completed	View
testuser	09-Apr-2019	Open	View

Medication

Stage 3 medication review start and summary of existing reviews on patient home

6.9.4 Start a stage 3 medication review

To start a stage 3 medication review, select the "Start" link from the patient home next to the stage 3 medication review heading.



Start a stage 3 medication review

The select source/view dispensing date range page is displayed.

6.9.5 Select source and view dispensing date range

The pharmacist can base the stage 3 medication review on medication history that has been imported from the PMR or added to PCR. Alternatively, they look at medication directly in the PMR that has not been imported to PCR. All stage 3 medication reviews must consider 12 months history so there are no dispensing date range options to select.

- Where the review will be based on medication that has been imported or added to PCR select "Imported or added to PCR" option.

- Where the review will be based on medication history obtained from the PMR, select "Obtained from PMR (not imported or added)" option.

All stage 3 medication reviews must consider 12 months of medication history. This means that there is no dispensing date range to select.

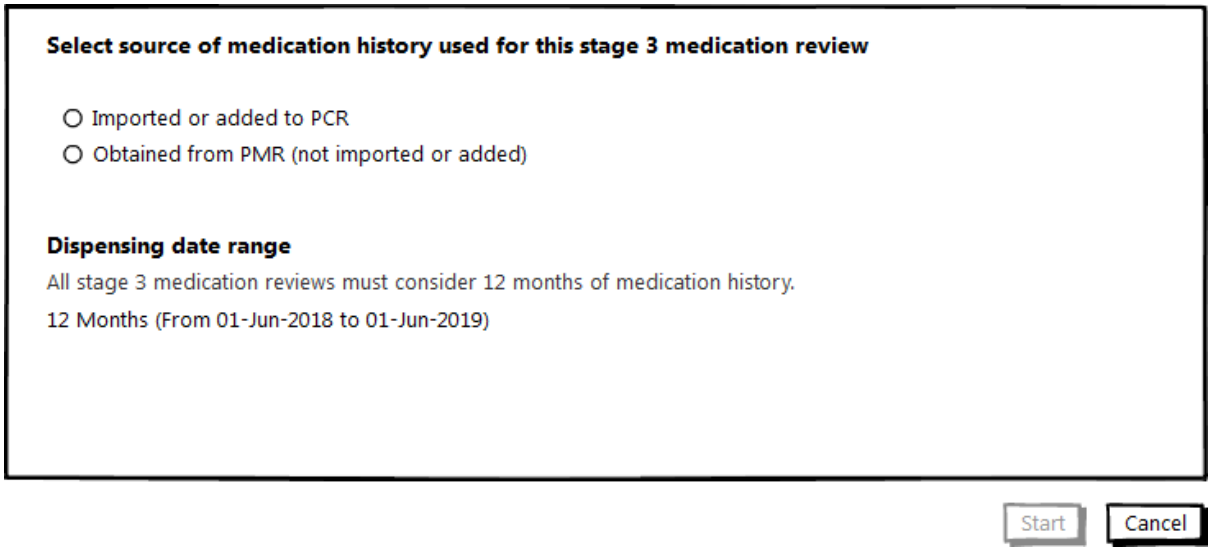
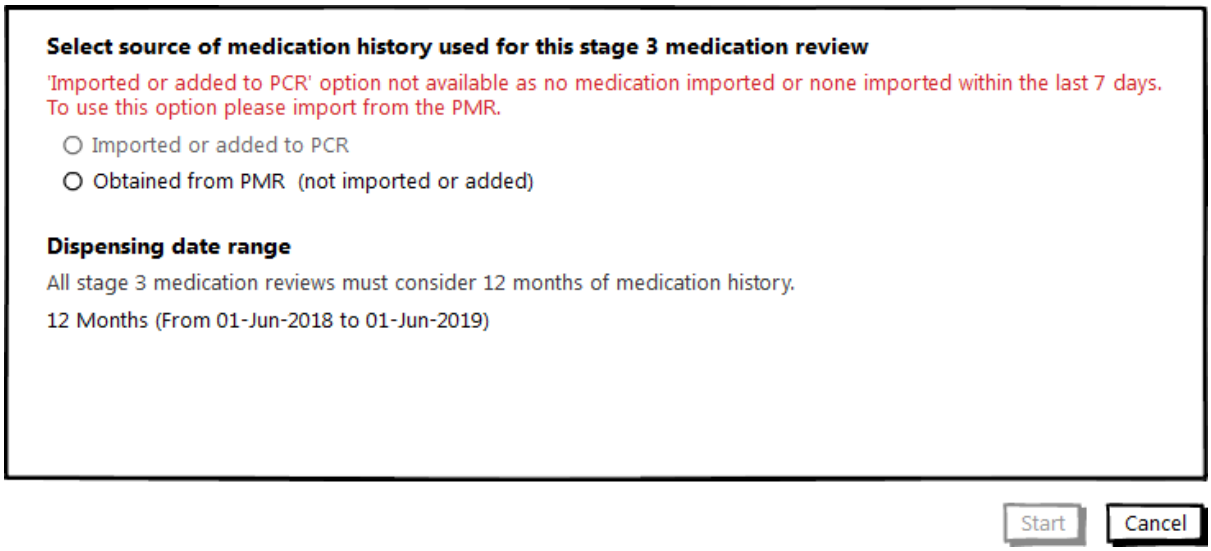


Figure 6-51: Select medication history source

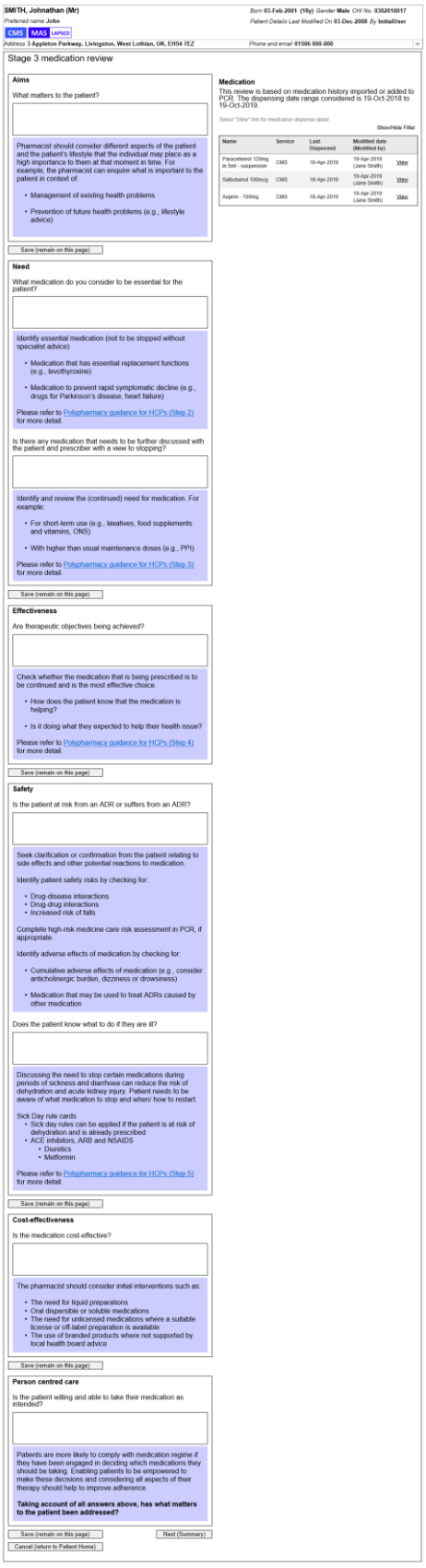
The option to use the imported or added function is disabled if no medication has been imported in the last 7 days and an error message is displayed, shown below.



Once you have selected your medication source option select “Start”, the stage 3 medication review question data entry page (responses) is displayed.

6.9.6 Question (data entry) page

Allows the pharmacist to detail a written response to stage 3 medication review questions in each polypharmacy domain. All data entry functions are on one single scrollable page. For the Imported or added to PCR option, medication history is displayed on the right. The entire page is shown below.



Stage 3 medication review question page

There is an option to “Save (Remain on this page)” below the guidance for each question group. Once all questions responses have been provided, select “Next (Summary)” to navigate to the summary page.

The table below lists all questions and guidance included in the stage 3 medication review:

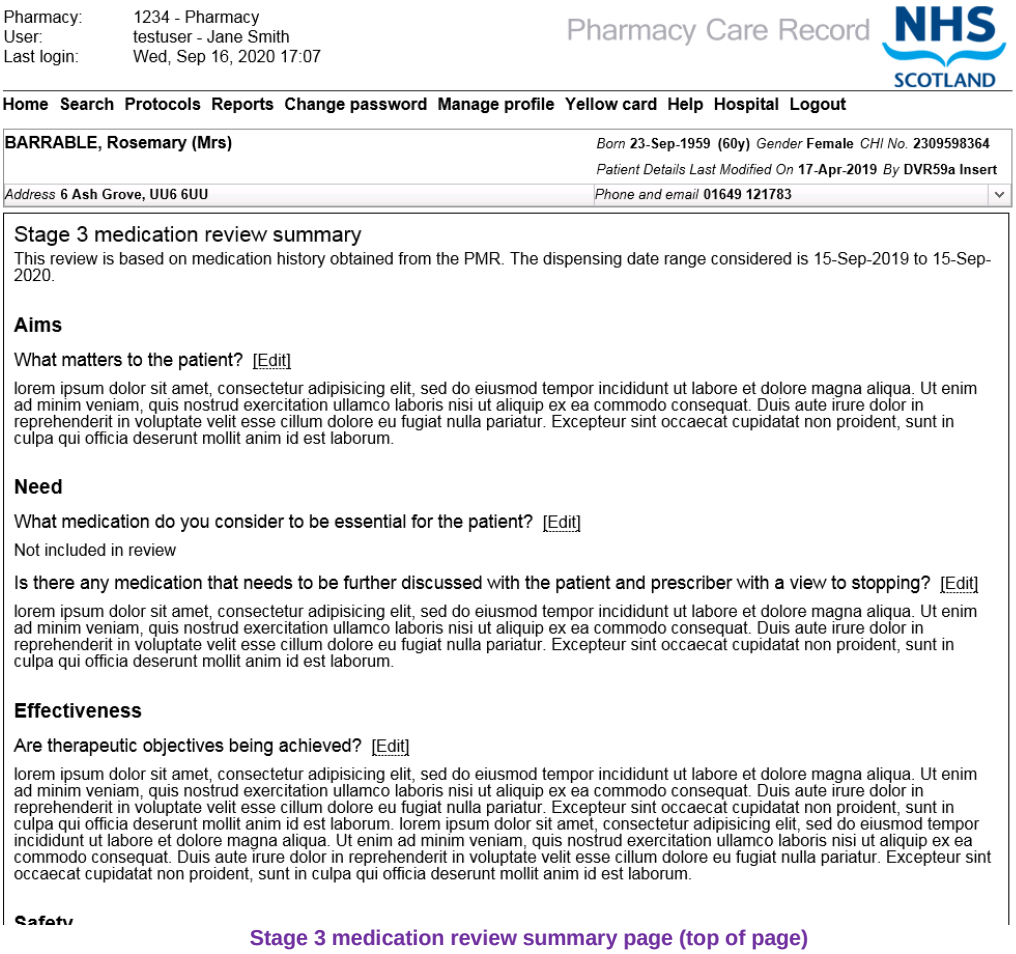
Domain	Question	Guidance
Aims	What matters to the patient?	Pharmacist should consider different aspects of the patient and the patient’s lifestyle that the individual may place as a high importance to them at that moment in time. For example, the pharmacist can enquire what is important to the patient in context of: • Management of existing health problems • Prevention of future health problems (e.g., lifestyle advice).
Need	What medication do you consider to be essential for the patient?	• Medication that has essential replacement functions (e.g., levothyroxine) • Medication to prevent rapid symptomatic decline (e.g., drugs for Parkinson’s disease, heart failure) Please refer to Polypharmacy guidance for HCPs (Step 2) for more detail.
Need	Is there any medication that needs to be further discussed with the patient and prescriber with a view to stopping?	Identify and review the (continued) need for medication. For example: For short-term use (e.g., laxatives, food supplements and vitamins, ONS). With higher than usual maintenance doses (e.g., PPI) Please refer to Polypharmacy guidance for HCPs (Step 3) for more detail.
Effectiveness	Are therapeutic objectives being achieved?	Check whether the medication that is being prescribed is to be continued and is the most effective choice. How does the patient know that the medication is helping? Is it doing what they expected to help their health issue? Please refer to Polypharmacy guidance for HCPs (Step 4) for more detail.
Safety	Is the patient at risk from an ADR or suffers from an ADR?	Seek clarification or confirmation from the patient relating to side effects and other potential reactions to medication.

Domain	Question	Guidance
		Identify patient safety risks by checking for: Drug-disease interactions Drug-drug interactions Increased risk of falls Complete high-risk medicine care risk assessment in PCR, if appropriate. Identify adverse effects of medication by checking for: Cumulative adverse effects of medication (e.g., consider anticholinergic burden, dizziness or drowsiness). Medication that may be used to treat ADRs caused by other medication.
Safety	Does the patient know what to do if they are ill?	Discussing the need to stop certain medications during periods of sickness and diarrhoea can reduce the risk of dehydration and acute kidney injury. Patient needs to be aware of what medication to stop and when/ how to restart. Sick Day rule cards - Sick day rules can be applied if the patient is at risk of dehydration and is already prescribed - ACE inhibitors, ARB and NSAIDS - Diuretics - Metformin Please refer to Polypharmacy guidance for HCPs (Step 5). For more detail.
Cost-effectiveness	Is the medication cost-effective?	The pharmacist should consider initial interventions such as: the need for liquid preparations oral dispersible or soluble medications the need for unlicensed medications where a suitable license or off-label preparation is available The use of branded products where not supported by local health board advice
Person centred care	Is the patient willing and able to take their medication as intended?	Patients are more likely to comply with medication regime if they have been engaged in deciding which medications they should be taking. Enabling patients to be empowered to make these decisions and considering all aspects of their therapy should help to improve adherence.

Domain	Question	Guidance
		Taking account of all answers above, has what matters to the patient been addressed?

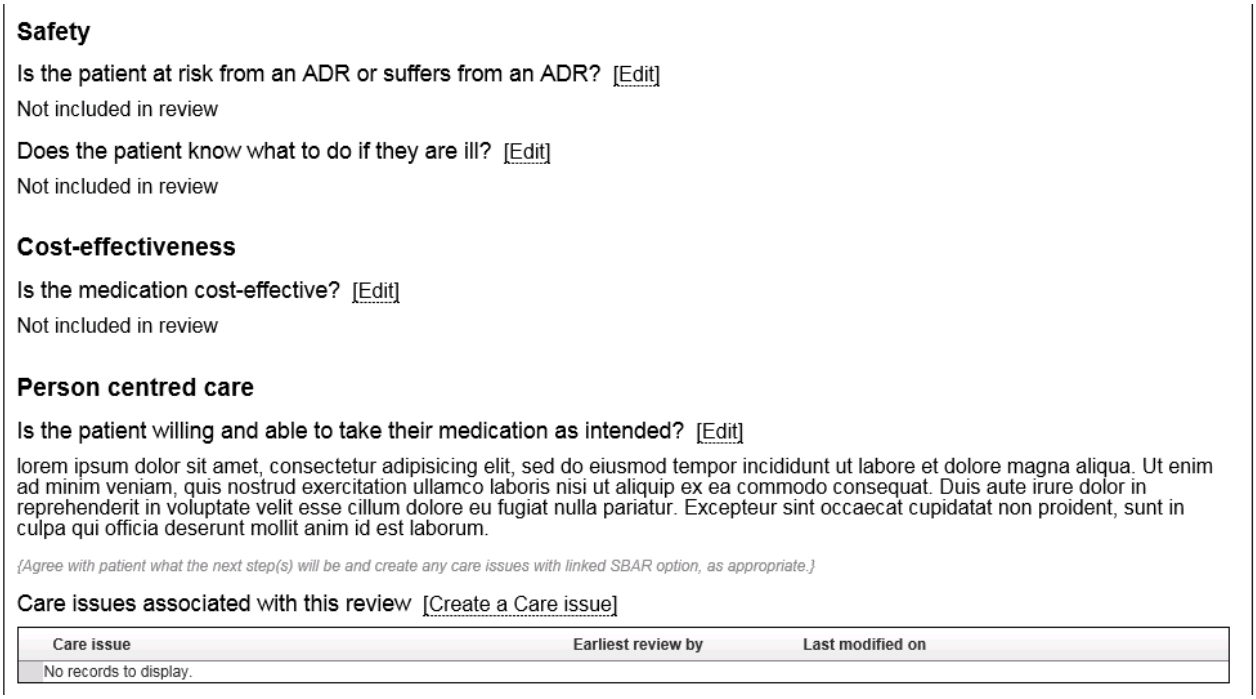
6.10 Summary page

The summary page displays all questions and the detail written by the pharmacist on the question page. If the pharmacist has not entered any text for a n individual question “Not included in review” is automatically displayed. For each question there is a link to “Edit” the question response.



Stage 3 medication review summary page (top of page)

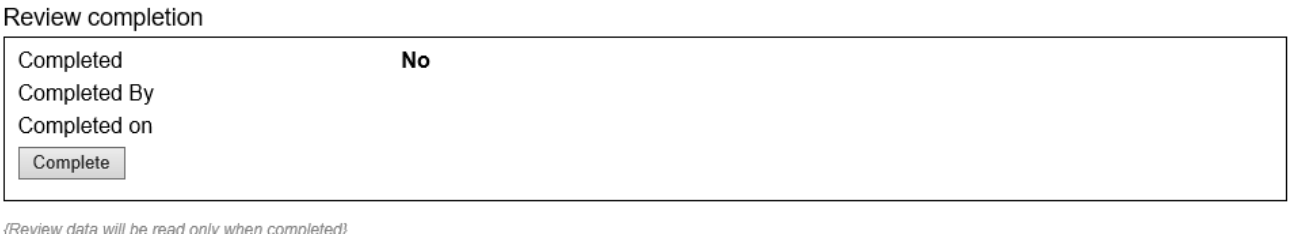
Below the main questions and responses section of the stage 3 medication review summary page is the option to “create a Care issue” associated with the review. Existing care issues are displayed in this view. For each care issue there is the option to create a linked SBAR.



Stage 3 medication review summary page: care issues

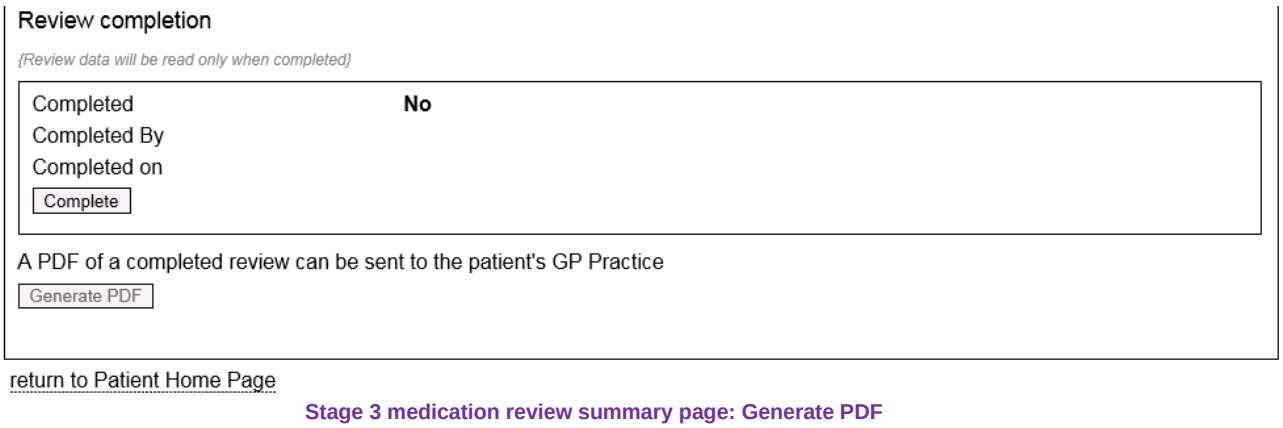
6.11 Completing a stage 3 medication review.

Function to complete review is accessible form the summary page.



Stage 3 medication review summary page: review completion

Once completed a button to generate a PDF is displayed. Selecting the “Generate PDF button will create the PDF and display the option to save the file.

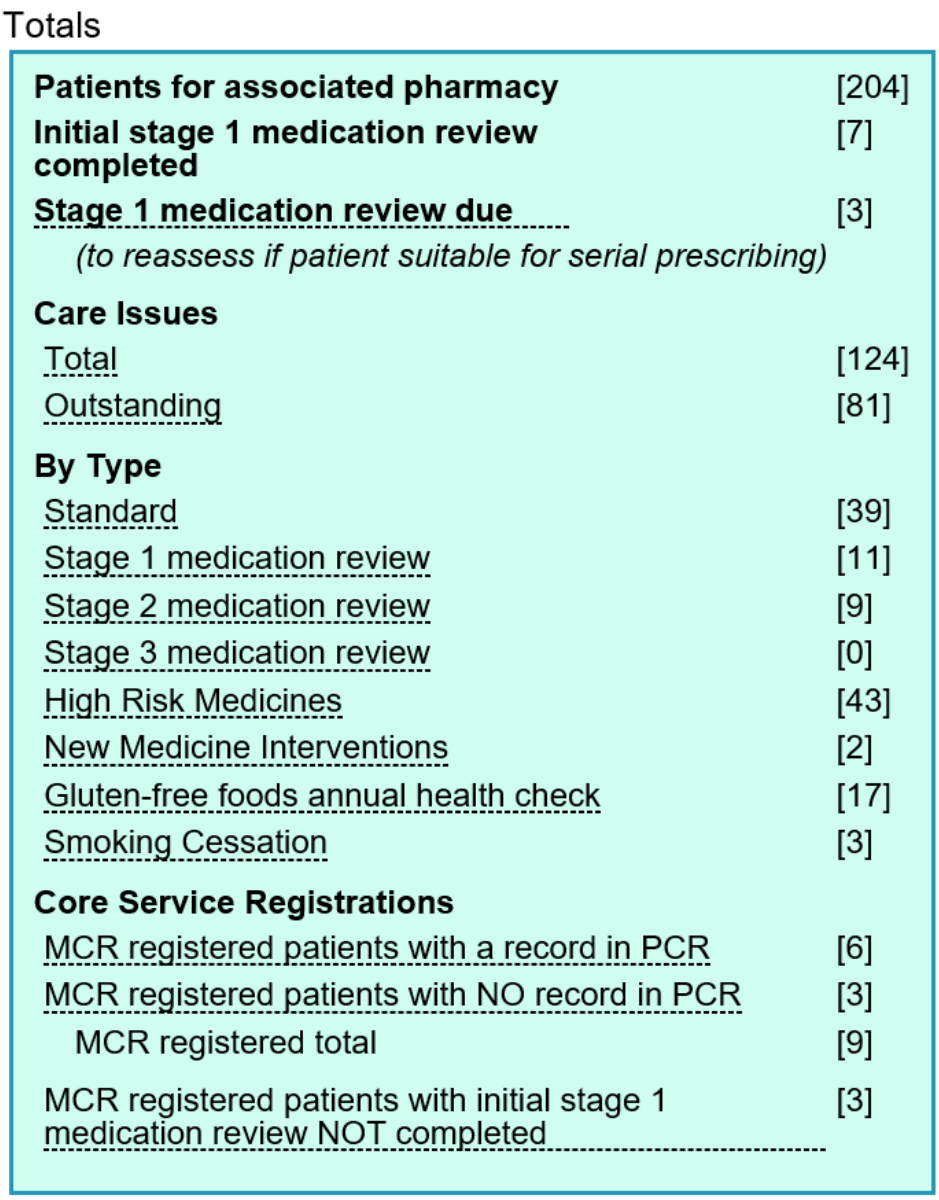


Stage 3 medication review summary page: Generate PDF

6.12 Pharmacy home total updated with stage 3 medication review care issue counts

New links in “Totals” section of pharmacy home

- (Care Issues) “By Type” for “stage 3 medication review”
  - This shows a count and link to all care issues created from the stage 3 medication review summary page.



Stage 3 medication review: pharmacy home care issue totals

6.13 Stage 3 medication review reports

New reports for stage 3 medication review are summarised here. For more detail on each individual report please refer to section 12, Reports.

- All stage 3 medication reviews
- All open stage 3 medication reviews
- All completed stage 3 medication reviews
- All stage 3 medication reviews with open care issues

6.13.1 All stage 3 medication reviews

Pharmacy: 1234 - Pharmacy
User: testuser - Jane Smith
Last login: Wed, Sep 16, 2020 17:07

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

All stage 3 medication reviews — Number of records on report: 23

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status	
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	17-Sep-2020	testuser	Open	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Open	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	15-Sep-2020	testuser	Completed	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	Completed	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	15-Sep-2020	testuser	Open	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	Completed	View

return to Reports Page

6.13.2 All open stage 3 medication reviews

Pharmacy: 1234 - Pharmacy
User: testuser - Jane Smith
Last login: Wed, Sep 16, 2020 17:07

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

All open stage 3 medication reviews

Number of records on report: 3

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	17-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	15-Sep-2020	testuser	View

return to Reports Page

6.13.3 All completed stage 3 medication reviews

Pharmacy: 1234 - Pharmacy
User: testuser - Jane Smith
Last login: Wed, Sep 16, 2020 17:07

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

All completed stage 3 medication reviews — Number of records on report: 20

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	15-Sep-2020	testuser	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	View

return to Reports Page

6.13.4 All stage 3 medication reviews with open care issues

Pharmacy: 1234 - Pharmacy
User: testuser - Jane Smith
Last login: Wed, Sep 16, 2020 17:07

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

All stage 3 medication reviews with open care issues — Number of records on report: 15

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status	No. of open care issues	
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	Completed	1	View

return to Reports Page

6.14 Medication

The patient home shows a summary of medication.

To review medication:

- Select the “Review” link on the patient home (Figure 6-52)

Medication

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
Gooey Grey Sludge		AMS	Desire to eat Gooey Grey sludge	08-May-2019	PCRDVR02User	False	View
Paracetamol		MCR	Test	11-Aug-2021	TestUser	False	View
Aspirin		CPUS	Test	11-Aug-2021	TestUser	False	View
Test Medicine 1		AMS	Test Medicine 1	11-Aug-2021	TestUser	False	View
Test Medicine 2		AMS	Test Medicine 2	11-Aug-2021	TestUser	False	View

[5 of 5] Review

Figure 6-52: Review Medication

- A list of medications are displayed (Figure 6-53)

Medications

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
Gooey Grey Sludge		AMS	Desire to eat Gooey Grey sludge	08-May-2019	PCRDVR02User	False	View
Paracetamol		MCR	Test	11-Aug-2021	TestUser	False	View
Aspirin		CPUS	Test	11-Aug-2021	TestUser	False	View
Test Medicine 1		AMS	Test Medicine 1	11-Aug-2021	TestUser	False	View
Test Medicine 2		AMS	Test Medicine 2	11-Aug-2021	TestUser	False	View

Add Medication
Import Medication

Figure 6-53: Medications

To add a medication:

- Click the “Add medication” link (Figure 6-53), the entry/edit medication is displayed (Figure 6-54)

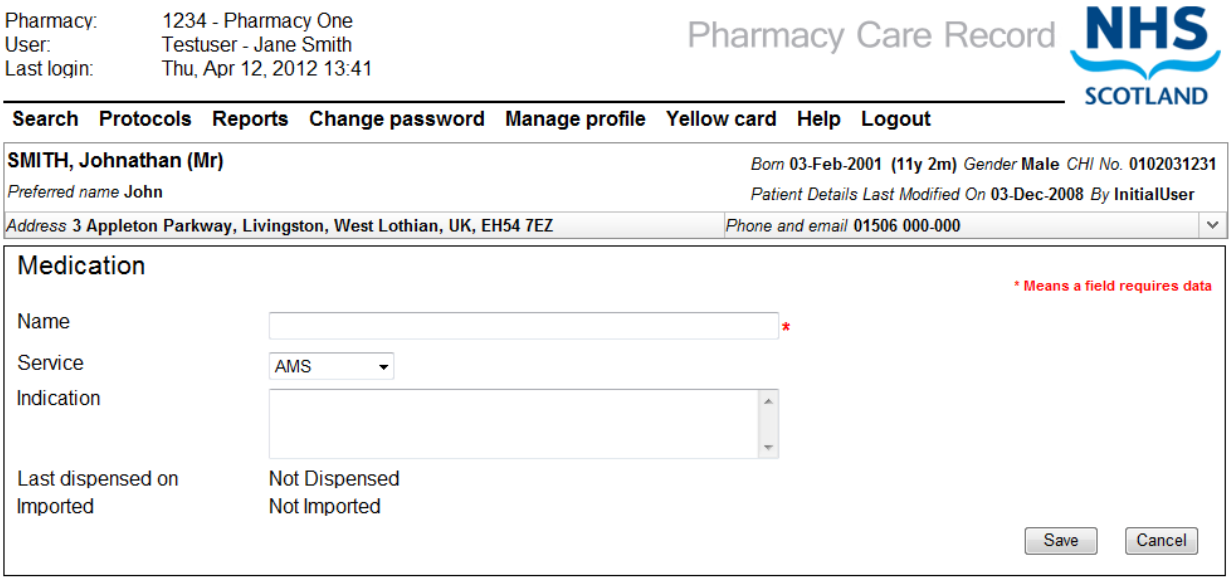


Figure 6-54: Add medication

- Enter the medication name (Mandatory)
- Select the service under which the medication was dispensed
- You can enter an indication (optional)
- Click the “Save button, the medication detail page is displayed (Figure 6-55)*

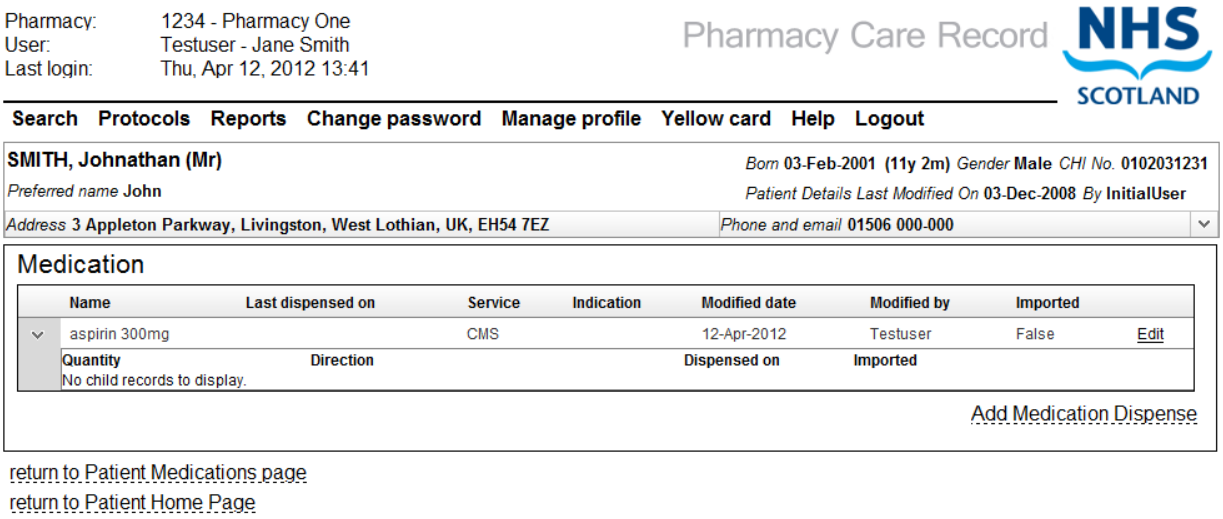


Figure 6-55: Medication summary

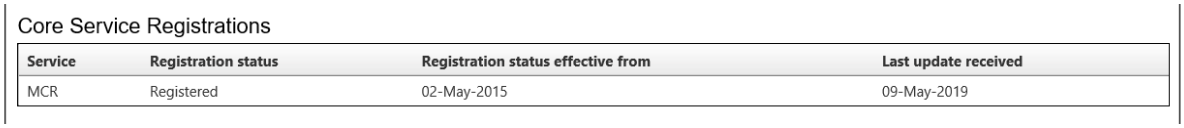
- *Alternatively click cancel to return to the patient home, no details will be saved

Note: *The imported value is ‘false’ this indicates that this item has been added manually.*

- Select the edit link to amend any details.

6.15 Core Service Registrations

The patient home displays a summary of registration information for patients that are known to be registered for MCR Figure 6-56.


Core Service Registrations

Service	Registration status	Registration status effective from	Last update received
MCR	Registered	02-May-2015	09-May-2019

Figure 6-56: Core Service Registrations

6.16 Pharmaceutical care risk assessment (Historical)

The function to create a Pharmaceutical care risk assessment was available from the initial release of PCR up to PCR version 12. It provided a snapshot assessment of the patient's situation in relation to their therapy and subsequent impact on their pharmaceutical care.

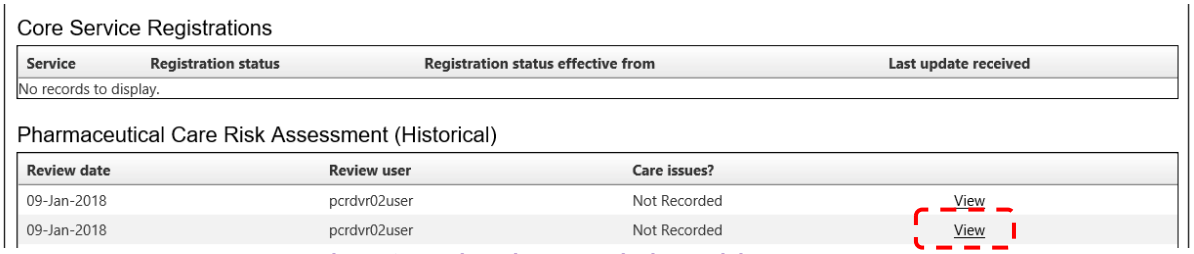
The pharmaceutical care risk assessment has been superseded by:

- Stage 1 medication review" (Implemented in PCR version 13.1)
- Stage 2 medication review (Implemented in PCR version 13.2)

However, pharmaceutical care risk assessments created in PCR (up to PCR version 12) remain viewable as historical record in PCR version 13.1 onwards.

To view a Pharmaceutical Care Risk Assessment (Historical)

- Select the "View" link next to the historical Pharmaceutical care risk assessment on the "Pharmaceutical care plan" tab. (Figure 6-57)


Core Service Registrations

Service	Registration status	Registration status effective from	Last update received
No records to display.			

Pharmaceutical Care Risk Assessment (Historical)

Review date	Review user	Care issues?	
09-Jan-2018	pcrdvr02user	Not Recorded	View
09-Jan-2018	pcrdvr02user	Not Recorded	View

Figure 6-57: View pharmaceutical care risk assessment

- The "Care Risk Assessment" page is displayed (Figure 6-58).

All information is 'read only'.

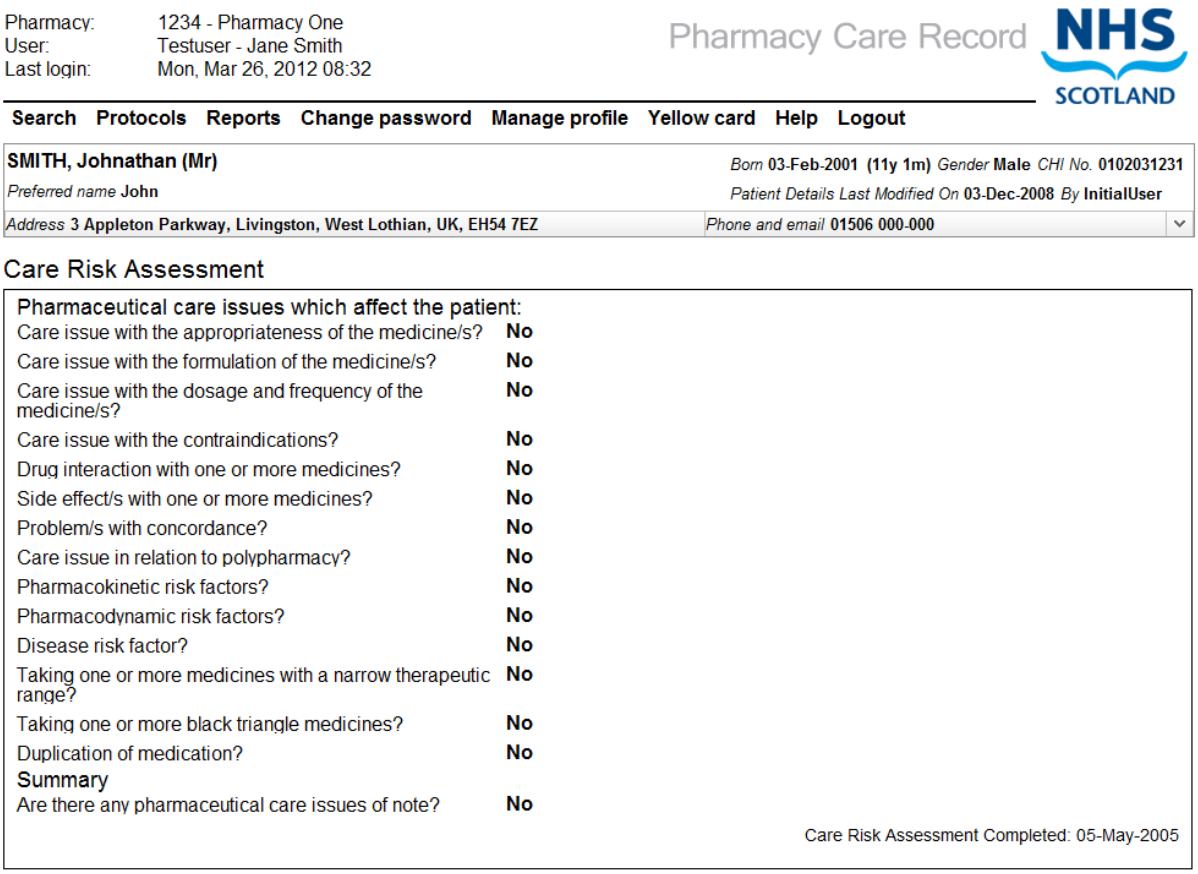


Figure 6-58: Care risk assessment (Historical) – Read only

7 High risk medicine care risk assessments

7.1 Overview

A high risk medicines care risk assessment allows pharmacists to record information about a patient's use of a particular medicine type. A high risk medicine care risk assessment can be completed for Methotrexate, Lithium, or Warfarin.

The assessment is a series of grouped questions, answers and supporting protocol guidance. The capability supports the capture and recording of the answers in line with the provided protocol.

The questions are grouped into the following sections:

- Concordance
- Interactions and precautions
- Adverse reactions
- Monitoring

A patient can have multiple high risk medicine care risk assessments over time.

Sections can be answered in sequence or be completed individually and reviewed and updated from the review page. Not all sections of the assessment need to be completed at the same time. Individual sections can be completed, saved and returned to at a later date.

Care issues and care issue outcomes can be associated with a high risk medicine care risk assessment; these can be viewed alongside standard care issues as well as with the associated high risk medicine care risk assessment.

A high risk medicine care risk assessment care issue and care issue outcome can be created with prepopulated text based on the context of an individual question. They can also be created independent of the questions – without prepopulated text.

The high risk medicine care risk assessment supports the concept of a status – Open or Completed. Care issues and care issue outcomes can continue to be added and updated to a completed high risk medicine care risk assessment.

7.2 Start a high risk medicine care risk assessment

Step 1 – start a high risk medicine care risk assessment:

Identify the patient you want to create a high risk medicine care risk assessment for and go to the patient home page.

Select the "High Risk Medicine Assessment" tab (Figure 7-1)

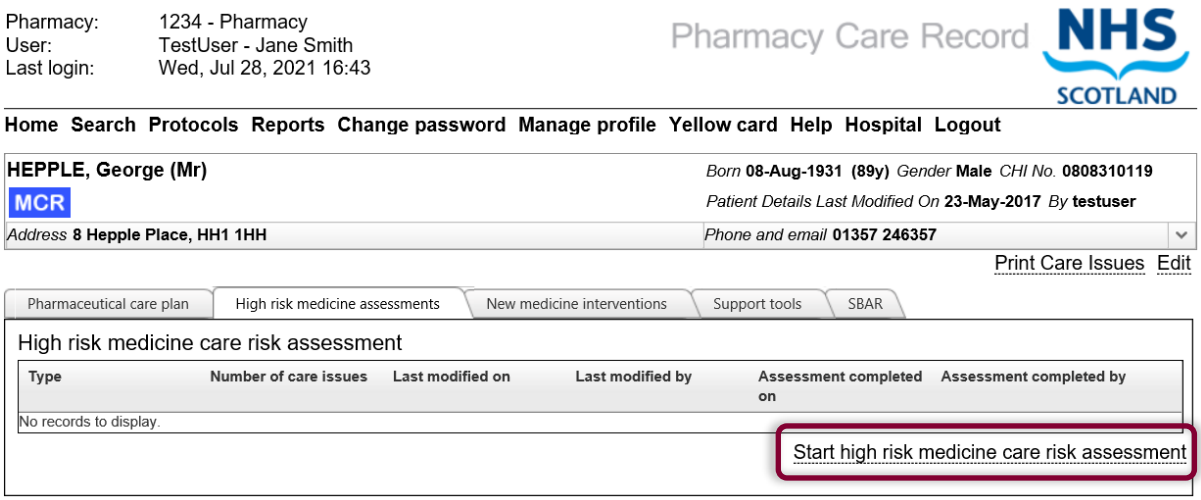


Figure 7-1: high risk medicines tab

Select "Start high risk medicine care risk assessment" link
The system will display the "high risk medicine selection" screen (Figure 7-2)

Step 2 – select a high risk medicine from the list:

- Select the high risk medicine from the drop down menu (The possible values are Methotrexate, Lithium, or Warfarin)

Figure 7-2: Drug Selection

***Note:** "Methotrexate" used in this example.*

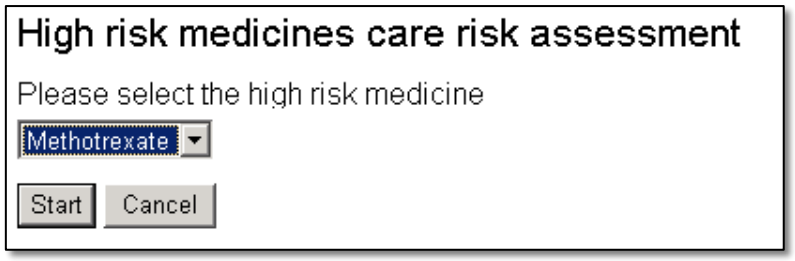


Figure 7-3: Select high risk medicine

Click the “Start” button (Figure 7-3)

The system will navigate to the Methotrexate “Concordance” questions page (Figure 7-4)

Note: *By selecting the “Start” button (Figure 7-3), creates a new high risk medicine care risk assessment within PCR.*

Selecting the “Cancel” button (Figure 7-3) returns the system to the patient home page – a high risk medicine care risk assessment is not created.

7.3 Create a high risk medicine care risk assessment

Having completed the steps in section 5.2, this section guides you through the procedure to create and save a high risk medicine care risk assessment.

Step 1 – Answer "Concordance" questions:

Provide an answer to all questions on the Concordance page by selecting either 'Yes' or 'No' for each question (Figure 7-4).

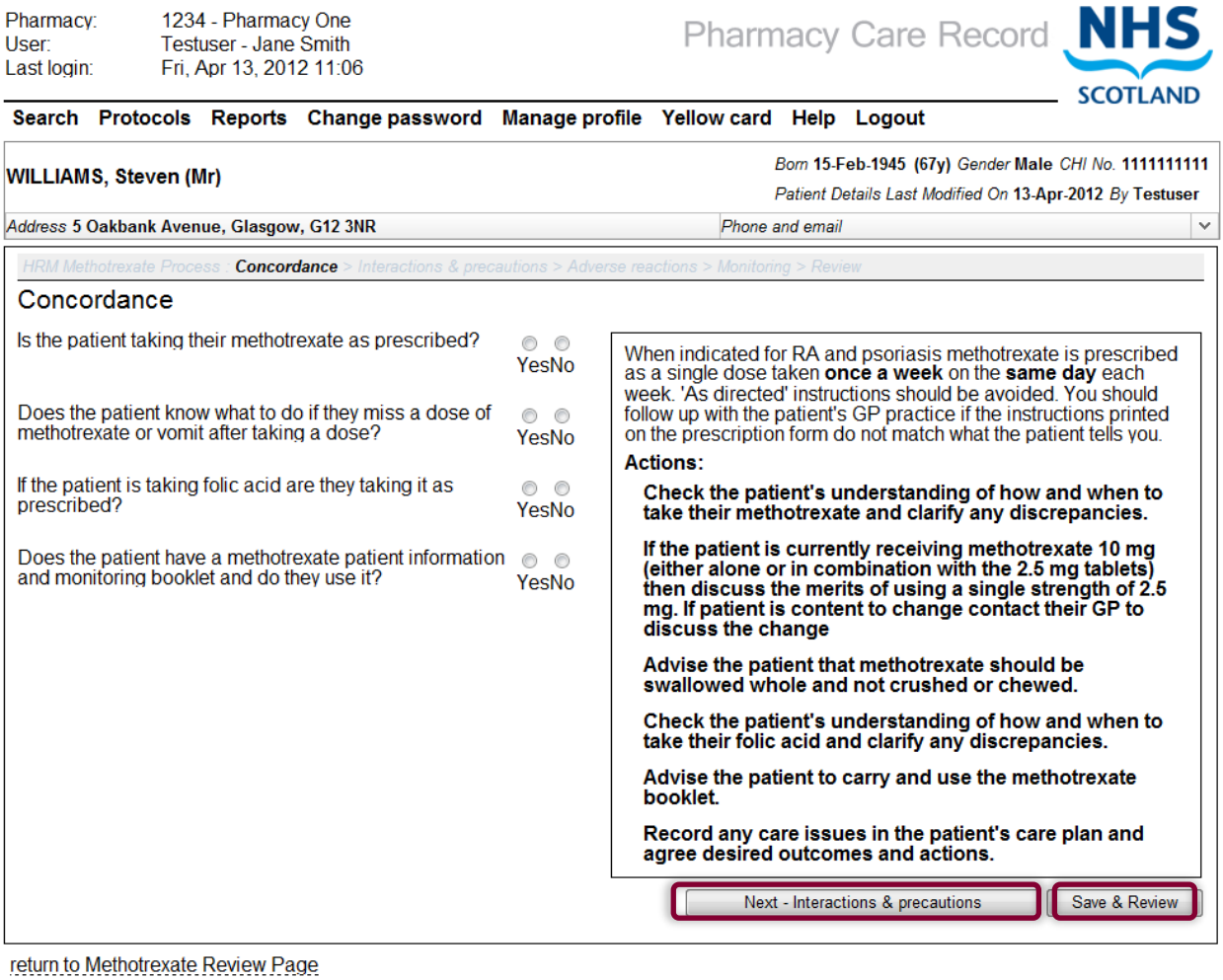


Figure 7-4: Methotrexate "Concordance" as example

User Options:

Select the "Next – Interactions & Precautions" button; The system will save entered data and navigate to the "Interactions & Precautions" screen; or

Select the "Save & Review" button; The system will save entered data and navigate to the "Review" screen for the selected high risk medicine

Note:

All questions are mandatory. If an answer is not selected an error message will be displayed when either the "Next" or "Save & review" buttons are selected, (Figure 7-5).

It is not possible to navigate to the next questions screen or the "review" screen unless an answer is provided for each question.

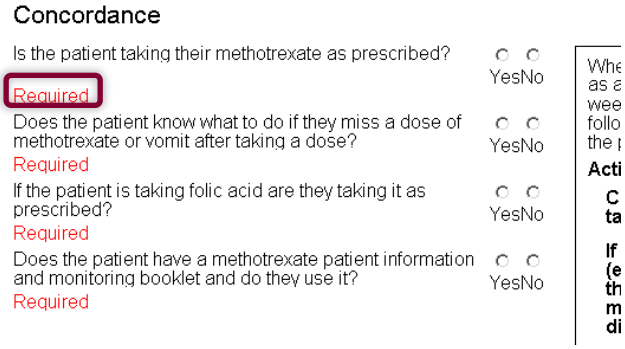


Figure 7-5: Error message – mandatory information

Step 2 Answer "Interactions & Precautions" questions:

***Note:** The Interactions & Precautions questions screen can be navigated to from the "Concordance" screen or directly from the review page if the High Risk Medicine Care Risk Assessment has already been created and saved.*

Select an answer for each of the questions on the Interactions & Precautions screen (Figure 7-6)

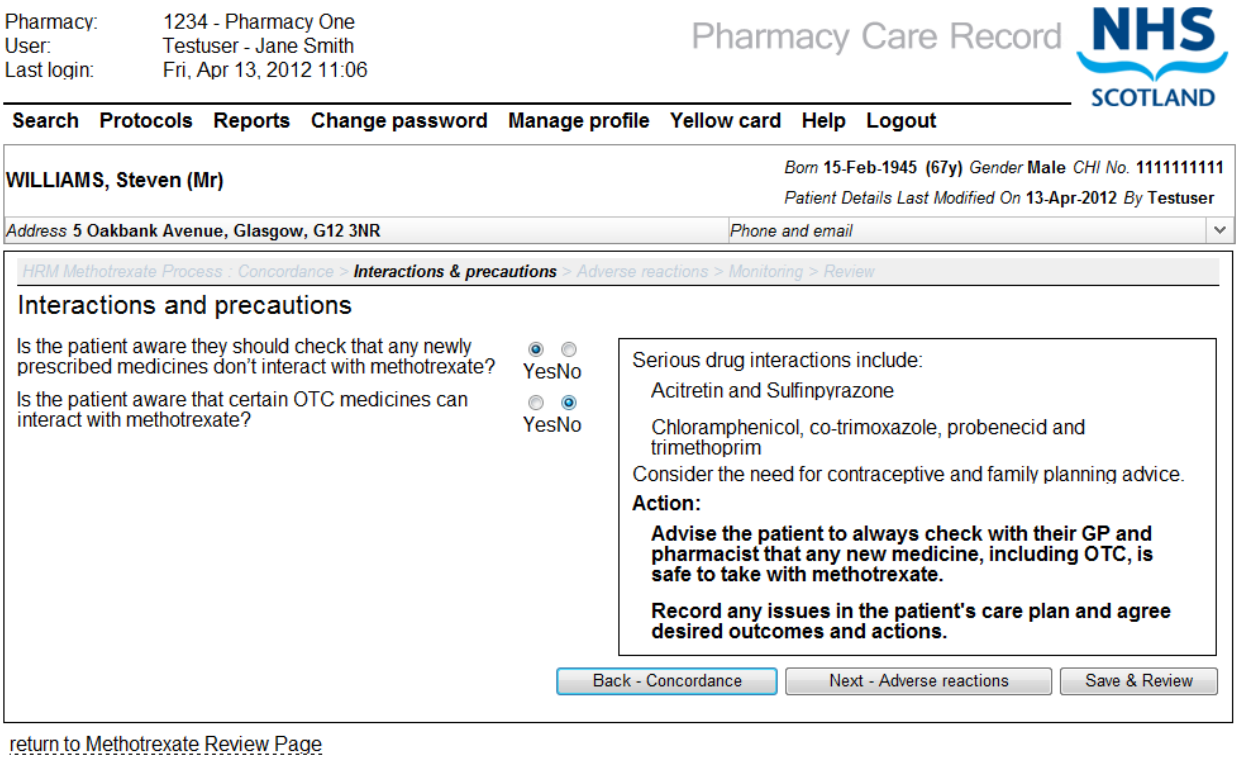


Figure 7-6: Interactions & Precautions screen

User Options:

Select the “Back – Concordance” button; the System will save entered data and navigate to the “Concordance” screen, (Figure 2-3); OR

Select the “Next – Adverse reactions” button; the system will save entered data and navigate to the “Adverse reactions” screen, (Figure 2-6); OR

Select the “Save & Review” button; The system will save the question answers and navigate to the “Review” screen for the selected medicine

Step 3: Answer “adverse reactions” questions:

Note: *The Adverse reactions questions screen can be navigated to from the “Interactions & precautions” screen or directly from the review page if the high risk medicine care risk assessment has already been created and saved.*

Select an answer for each of the questions on the Adverse reactions” screen (Figure 7-7)

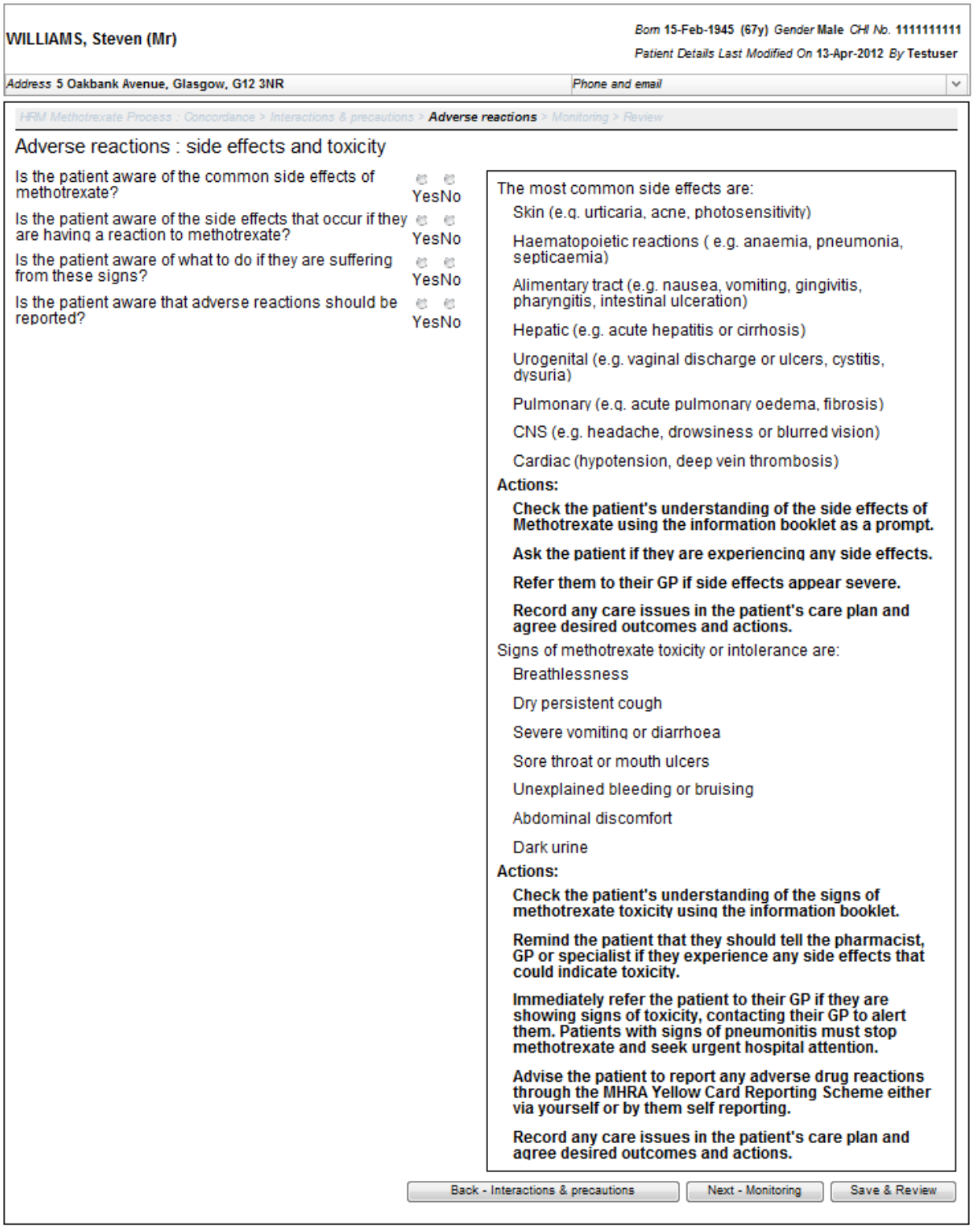


Figure 7-7: Adverse reactions screen

User Options:

Select the “Back – Interactions & precautions” button; the System will save entered data and navigate to the “Interactions & precautions” screen, (Figure 2-5); OR

Select the “Next – Monitoring” button; the system will save entered data and navigate to the “Adverse reactions” screen, (Figure 7-8); OR

Select the “Save & Review” button; the system will save the question answers and navigate to the “Review” screen for the selected medicine

Step 4: Answer monitoring questions

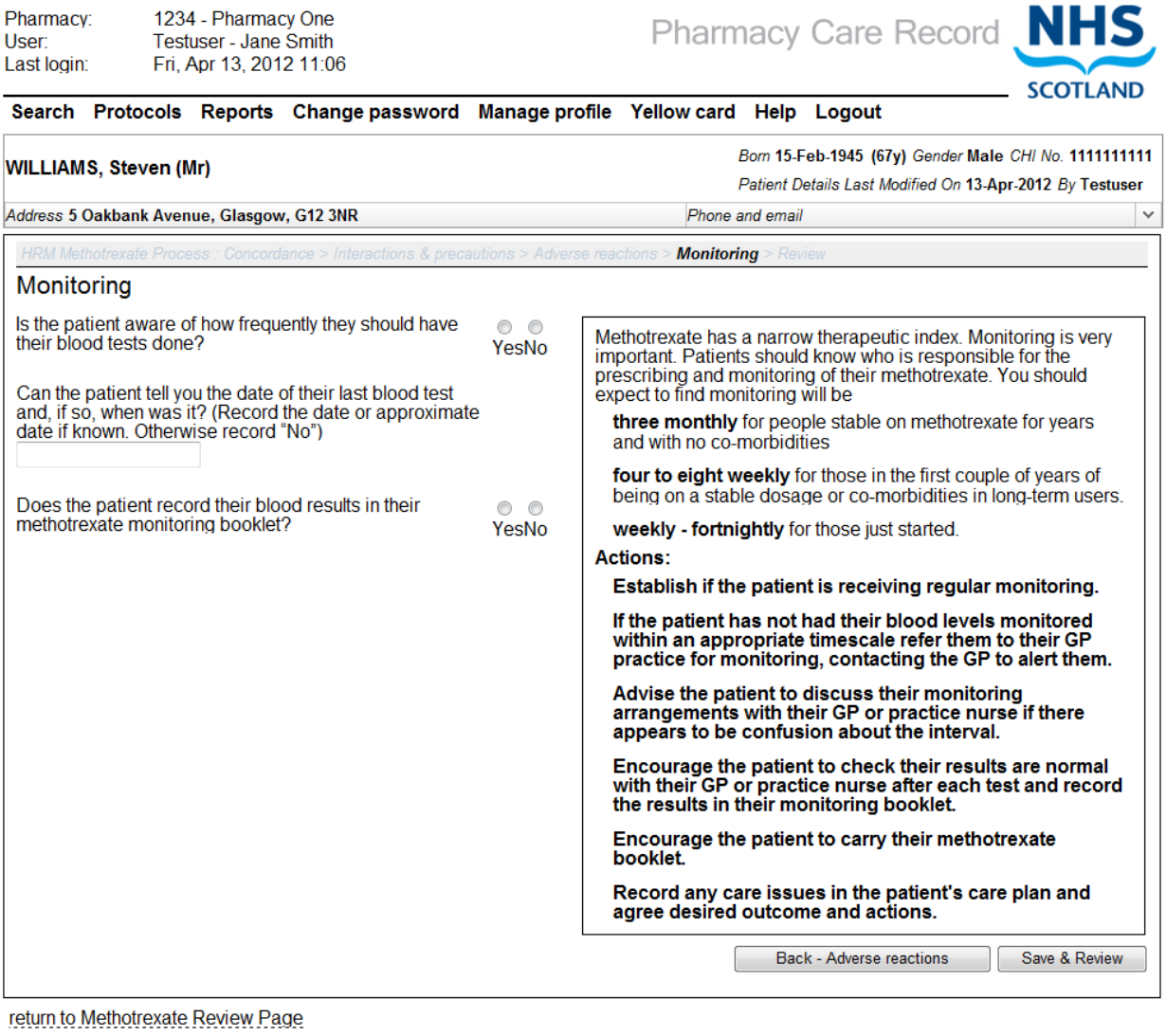


Figure 7-8: Monitoring questions screen

- Provide answers to the monitoring questions using the radio buttons for question 1 and 3 and the text input field for question 2.

User Options:

- Select the “Back – Adverse reactions” button; The system will navigate to the “Adverse reactions” screen, (Figure 7-7); OR
- Click the “Save & Review” button. The system will navigate to the “Methotrexate Review” screen (Figure 7-9)

7.4 High risk medicine care risk assessment summary page

The summary page shows an overview of all questions and any answers provided for the medicine selected in section 5.2, step 3.

If an answer has not been provided for a question this will be shown as “Unanswered”, (Figure 7-10)

The headings for each question group are hyperlinks to the corresponding questions pages. (See highlighted examples in concordance section).

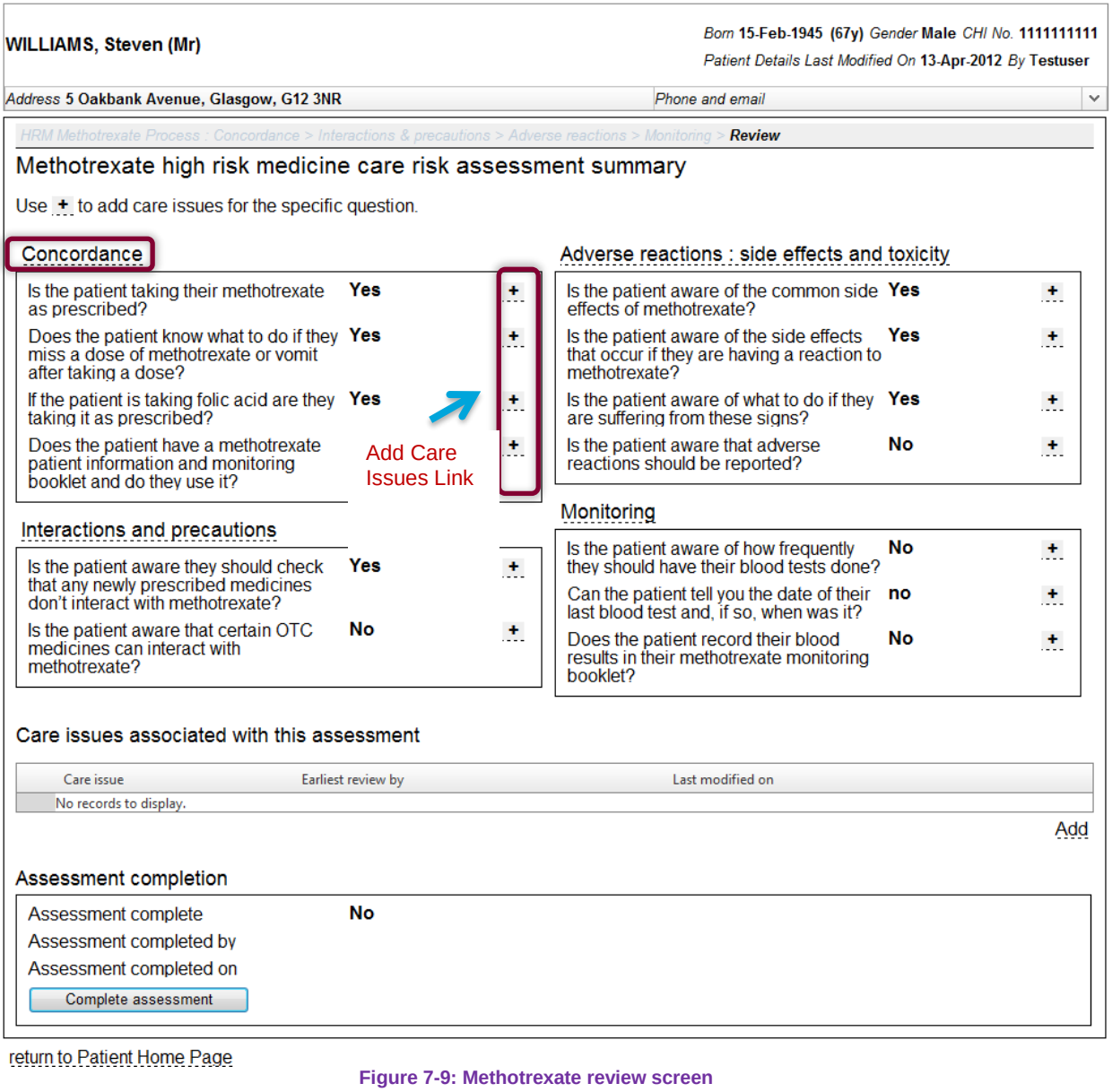


Figure 7-9: Methotrexate review screen

Care Issues associated with the assessment are shown below the questions summary. (Figure 7-9)

The assessment completion status is shown at the bottom of the screen (Figure 7-10)

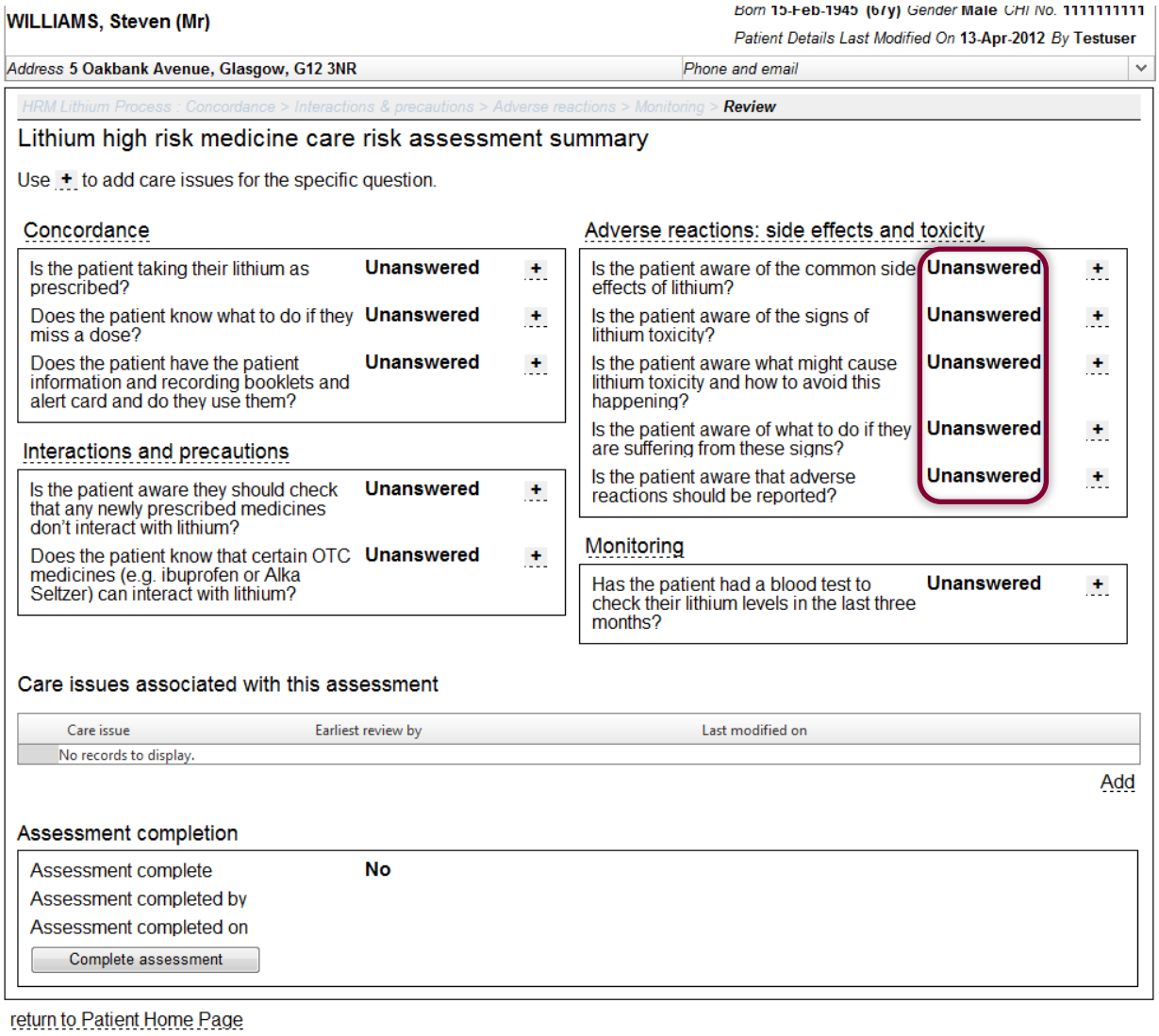


Figure 7-10: denotes unanswered questions

7.4.1 Additional information on Warfarin Summary Page

The Warfarin summary page has additional “Key Messages” and “Actions” information text.

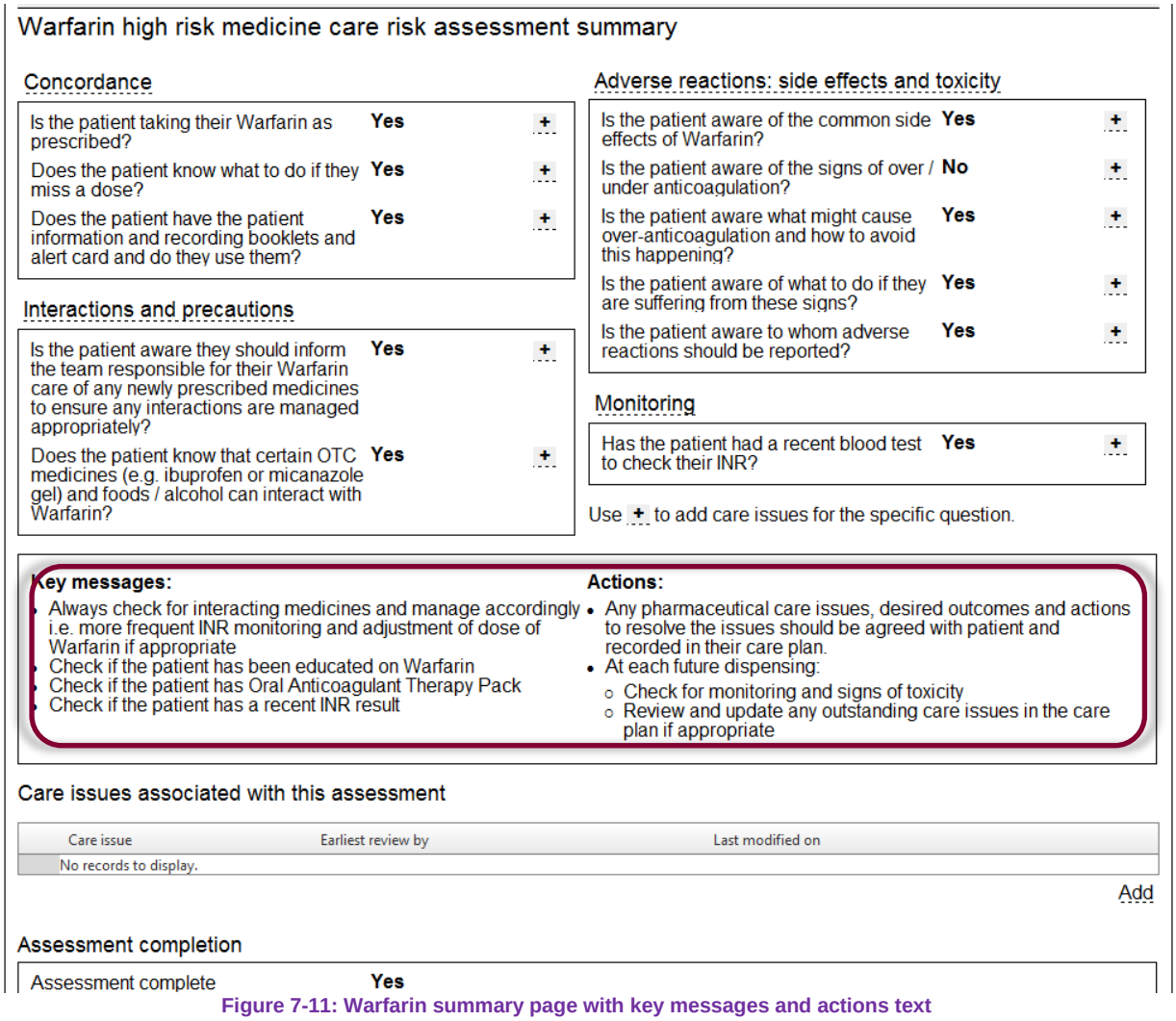


Figure 7-11: Warfarin summary page with key messages and actions text

7.5 Create associated care issue and care issue outcome using prepopulated text

Selecting a link next to a question on the high risk medicine review page will populate the care issue with default text.

Note: *This option does not mean that the care issue is associated with the actual question – the association is at assessment level.*

Step 1: Select link

- Select a + link for the question that you want to create a care issue / care issue outcome for, (Figure 7-12)

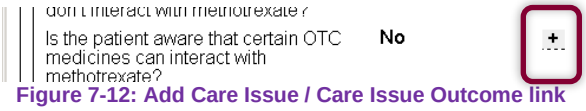


Figure 7-12: Add Care Issue / Care Issue Outcome link

- The system will display the high risk medicines "Record care issue" screen (Figure 7-13)

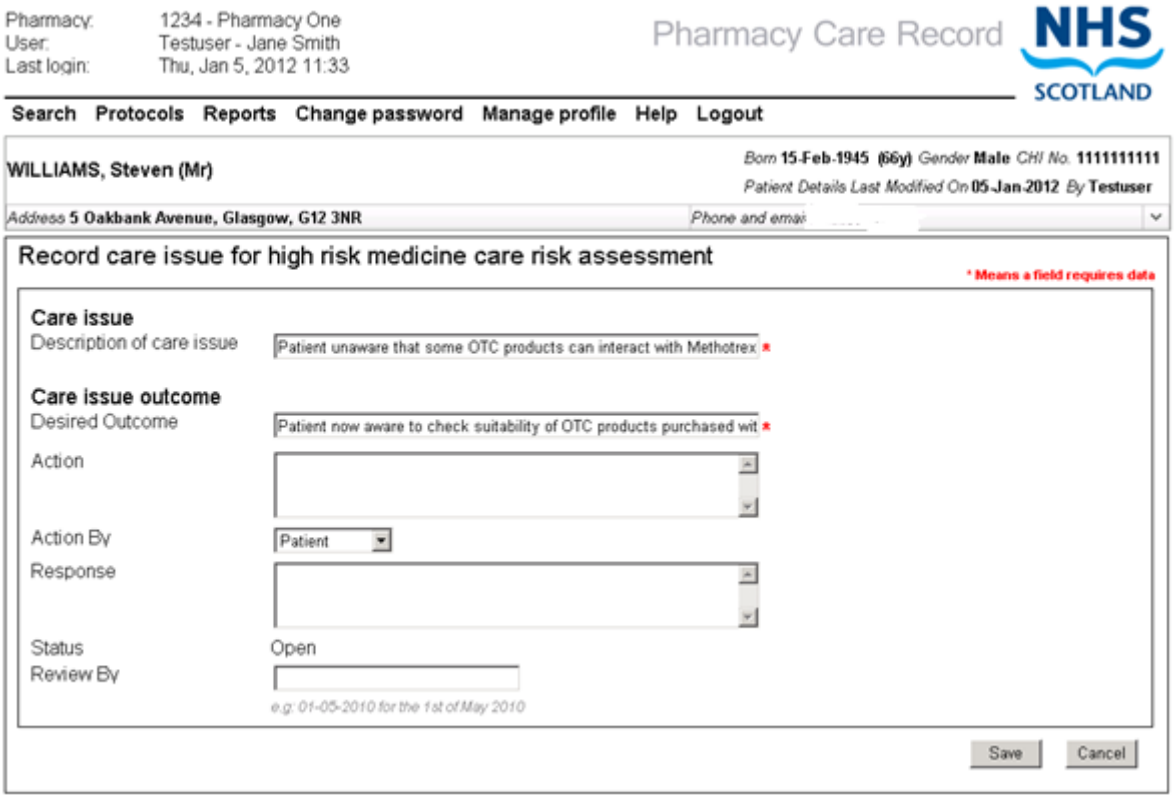


Figure 7-13: high risk medicines "Record care issue" screen

Note: *The "description of care issue" text input box and the "Desired outcome" text input box will be prepopulated with default text. This text can be modified.*

Step 2: Enter form details

Enter relevant details into the form:

- Description of care issue (Mandatory)
- Desired Outcome (Mandatory)
- Action
- Action By
- Response
- Status (Display Text)
- Review by

Step 3: Save details

- Click “Save”
- The system will add the Care Issue / Care Issue Outcome to the PCR database and navigate to the “Review” screen
- The newly created Care Issue / Care Issue Outcome will be listed in the “Care issues associated with this assessment” grid (Figure 2-12)

***Note:** If the entered “Review by” date is in the past a warning message will be displayed.*

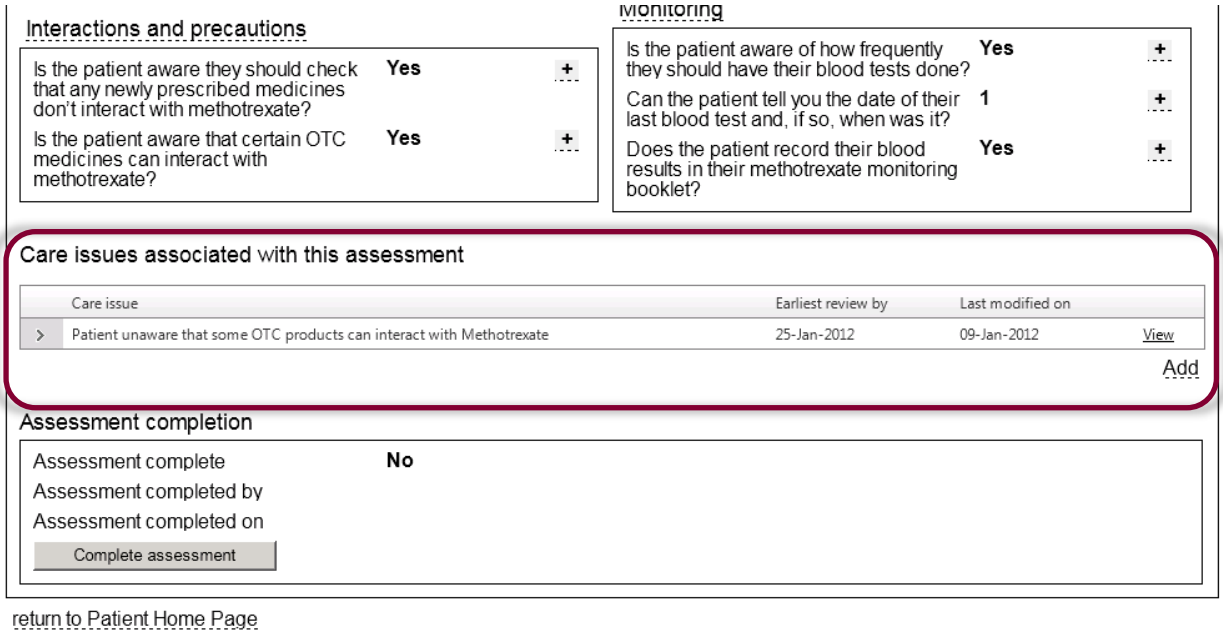


Figure 7-14: Care Issues Associated with This Assessment

7.7 Create associated care issue / care issue outcome using the “Add” link

This option allows you to add an associated care issue (with the assessment), but without prepopulating any text.

Step 1: Select link

- Select the “Add” link at the bottom of the “Care issues associated with this assessment” grid (Figure 7-14)
- The care issue form is displayed (Figure 7-15)

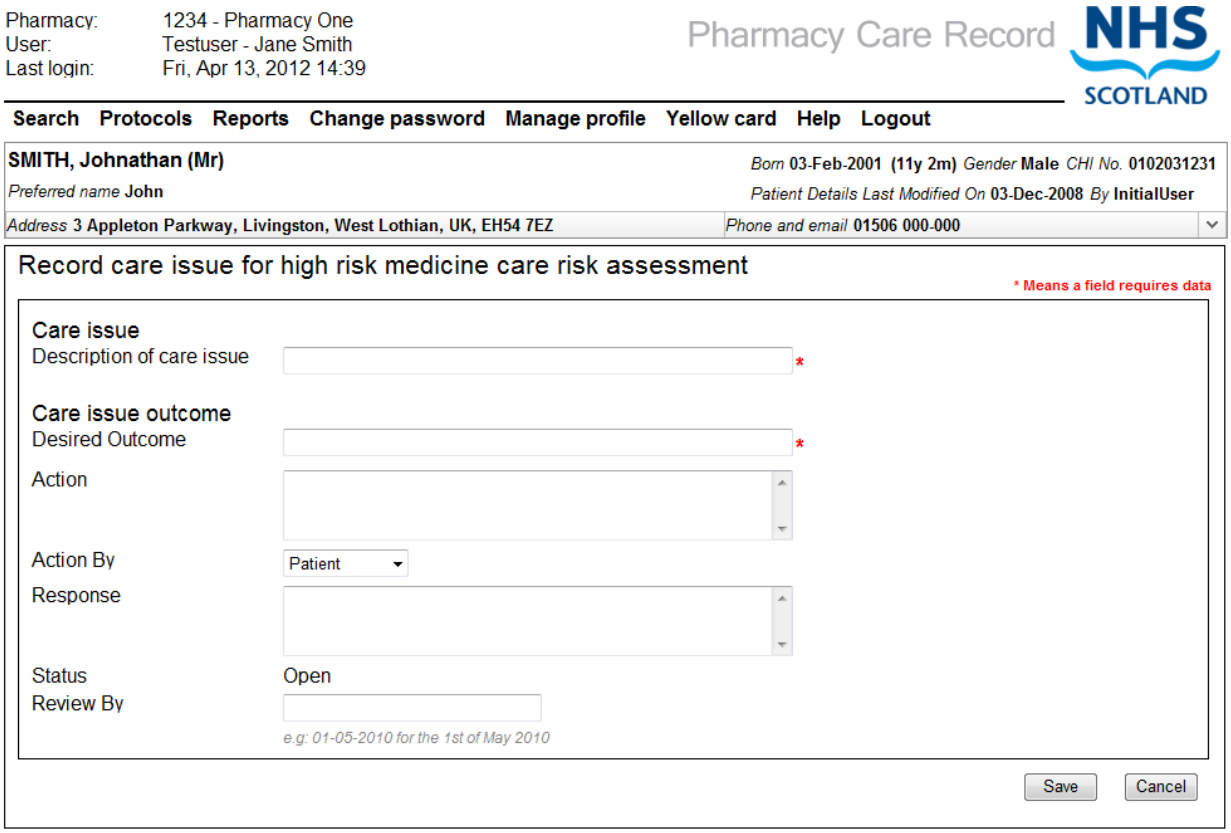


Figure 7-15: Record care issue

Step 2: Enter form details

Enter relevant details into the form:

- Description of care issue (Mandatory)
- Desired Outcome (Mandatory)
- Action
- Action By
- Response
- Status (Display Text)
- Review by

Step 3: Save details

- Click “Save”
- The system will add the care issue / care issue outcome to the PCR database and navigate to the “Methotrexate Review” screen
- The newly created care issue / care issue outcome will be listed in the “care issues associated with this assessment” grid (Figure 7-16)

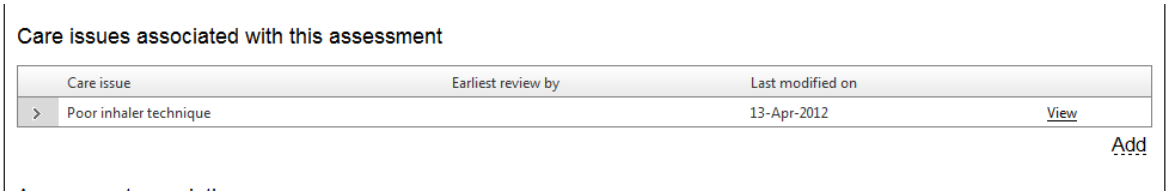


Figure 7-16: Associated care issues

Note: *Because this care issue is not associated with a question, there is no prepopulated text in the form.*

7.8 Set the status of a high risk medicine care risk assessment to "Completed"

To "Complete" a high risk medicine care risk assessment:

- From the HRM review page, select the "Complete assessment" button in the "Assessment completion" section of the Review screen (Figure 7-17)
- The system will set the status of the assessment to completed and refresh the page (Figure 7-18)
- The assessment completion details will be updated:
    - Assessment Complete = Yes
    - Assessment completed by – Pharmacist ID
    - Assessment completed on – date

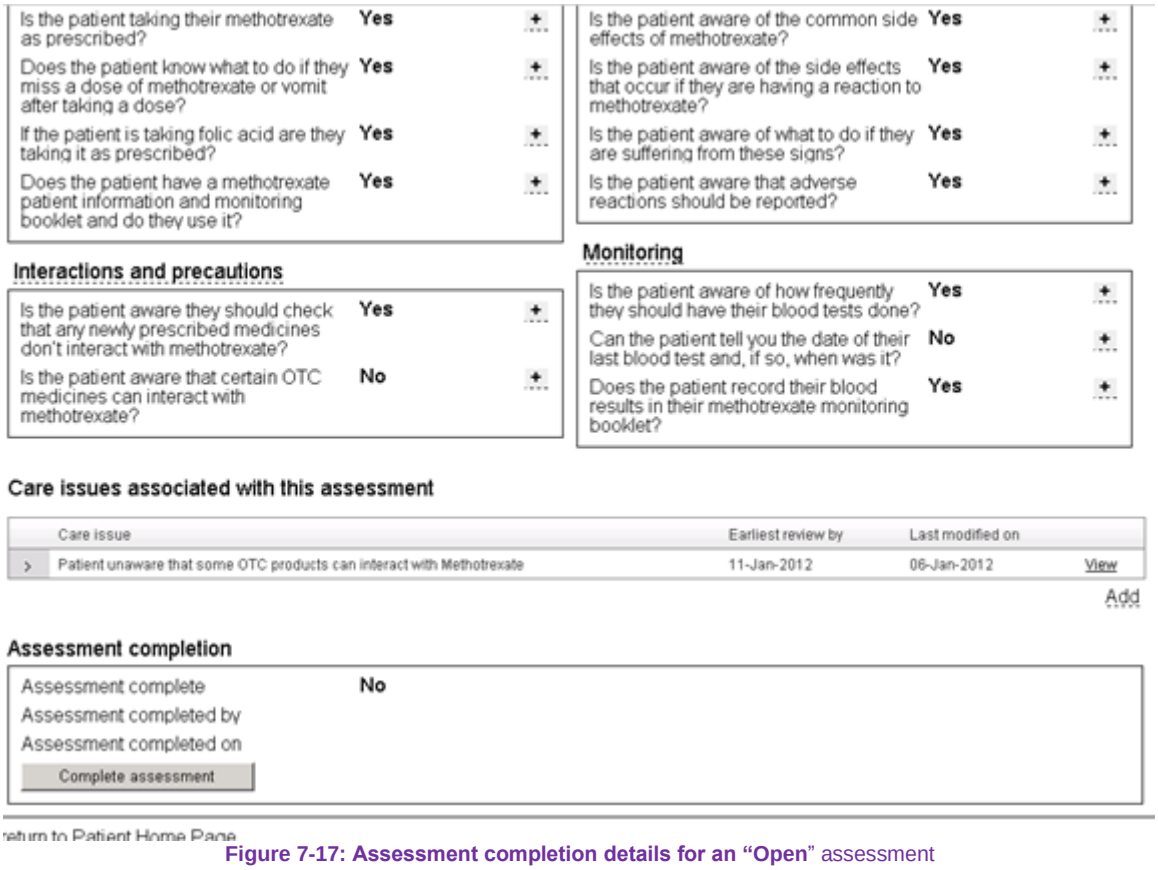


Figure 7-17: Assessment completion details for an "Open" assessment

Figure 7-18: Assessment completion details updated

The user can navigate back to the patient home from the link at the bottom of the review page.

7.9 Access existing high risk medicine care risk assessments from the patient home page

"Open "or "Completed" HRM Care Risk Assessments can be accessed from the "High Risk Medicines" tab on the Patient Home page.

To edit an "Open" High Risk Medicine Care Risk Assessment;

- Select the "Edit" link for the HRM Care Risk Assessment you want to edit (Figure 7-19)
- The system will navigate to the HRM Care Risk Assessment Review page

To view a "Completed" High Risk Medicine Care Risk Assessment:

- Select the "View" link for the HRM Care Risk Assessment you want to View (Figure 7-19)
- The system will navigate to the HRM Care Risk Assessment Review page

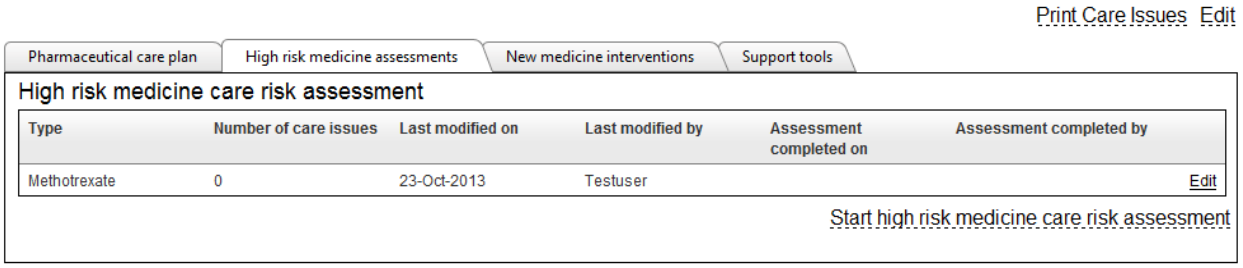


Figure 7-19: High Risk Medicines tab

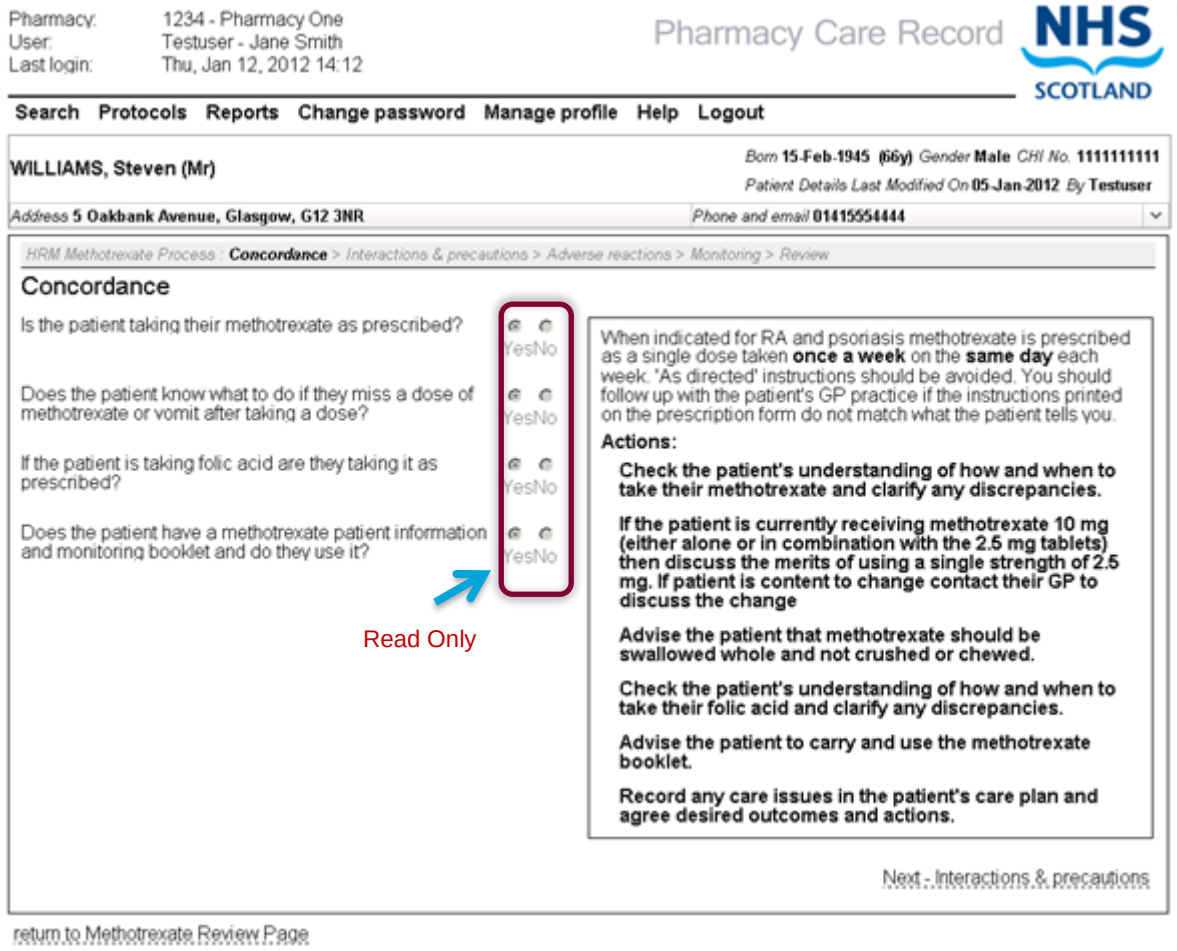


Figure 7-20: Read only – completed assessment

Note: *All data for a completed HRM Care Risk Assessment is shown as read only (Figure 7-20). This means that responses for a completed HRM Care Risk Assessment cannot be edited; however, it is still possible to add a Care Issue / Care Issue Outcome to a completed HRM Care Risk Assessment.*

8 New medicine interventions

8.1 Overview

The New Medicine Interventions allows healthcare professionals to create and maintain an intervention record for patients that have a newly prescribed medicine. This functionality allows users to:

- Start a new medicine intervention record where you record the medication details, indication, instructions and service type
- Create and maintain an initial intervention record
- Create and maintain one or more follow-up intervention records
- Associate care issue / care issue outcomes to a new medicine intervention record
- Complete a new medicine intervention record

8.2 Start a new medicine intervention

To start a new medicine intervention:

- Select the "New Medicines Interventions" tab on the patient home page (Figure 8-1)
- Select the "Start new medicine intervention" link, the "enter medication details" page will be displayed (Figure 8-2)

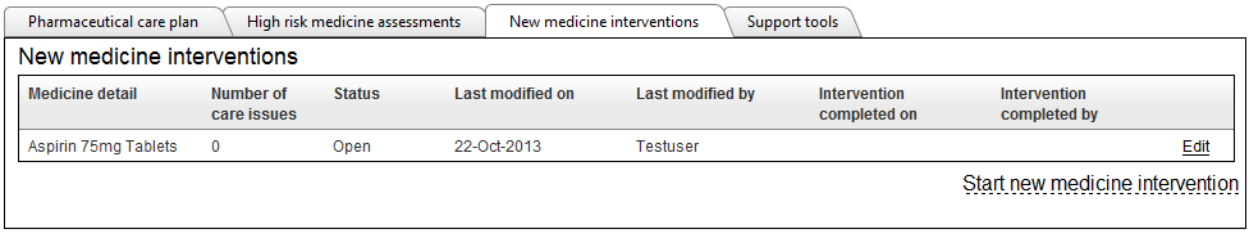


Figure 8-1: New medicines interventions tab on patient home page

8.3 Enter medication details

To enter and save medication details:

- Enter the required information in the medication details page (Figure 8-2)

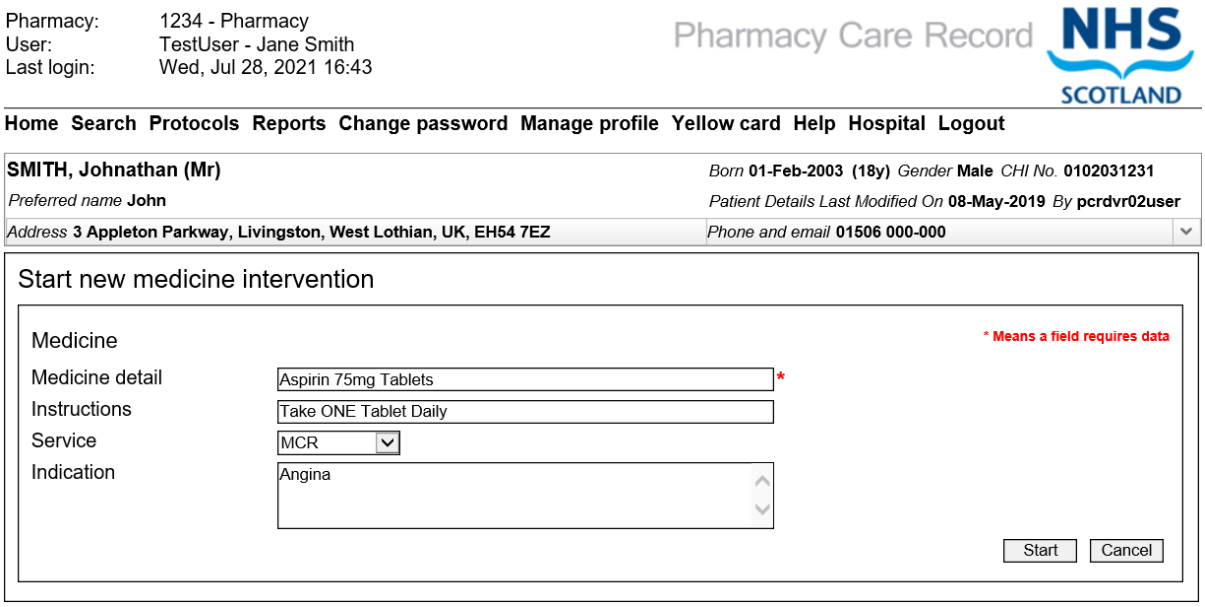


Figure 8-2: Medication details page

The table below shows an example of data to be entered in the medication details page.

Item	Example
Medicine detail (Name, Strength and Form)	Aspirin 75mg Tablets
Instructions	Take ONE Tablet Daily
Service	Select from list: MCR or AMS. Note the list also includes MAS, CPUS, OTC or other; it is not expected that any of these latter categories will be used for the New Medicine Intervention service.
Indication	Angina

- Select the “Start” button, the “Initial Intervention” entry page will be displayed.

8.4 Enter answers to initial intervention questions

The Initial intervention entry page is shown in (Figure 8-3)

To enter answers to initial intervention questions:

- Confirm or select intervention date in the “Intervention” record section of the page (Figure 8-3).

***Note:** The Intervention date will default to today’s date. If you have gathered the information from the patient on a different date you can use the date picker to change this.*

- Provide answers to initial intervention questions by selecting Yes, No or Not Recorded (Free text notes can be added to each question)
- Select the “Record & Review” button, the new medicines interventions review page is displayed (Figure 8-4)

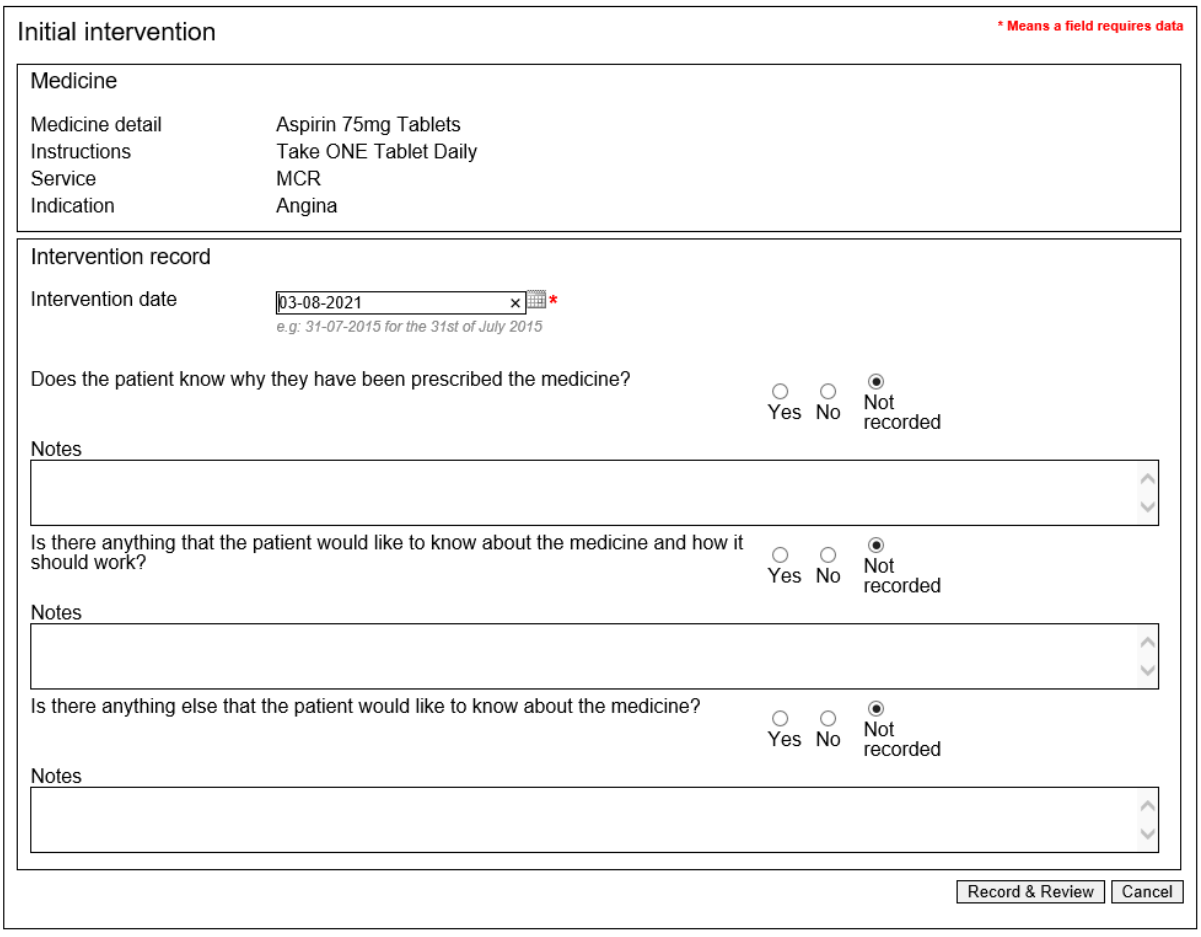


Figure 8-3: Initial intervention entry page

8.5 New medicines interventions review page

This section describes the options available from the new medicines interventions review page (Figure 8-4).

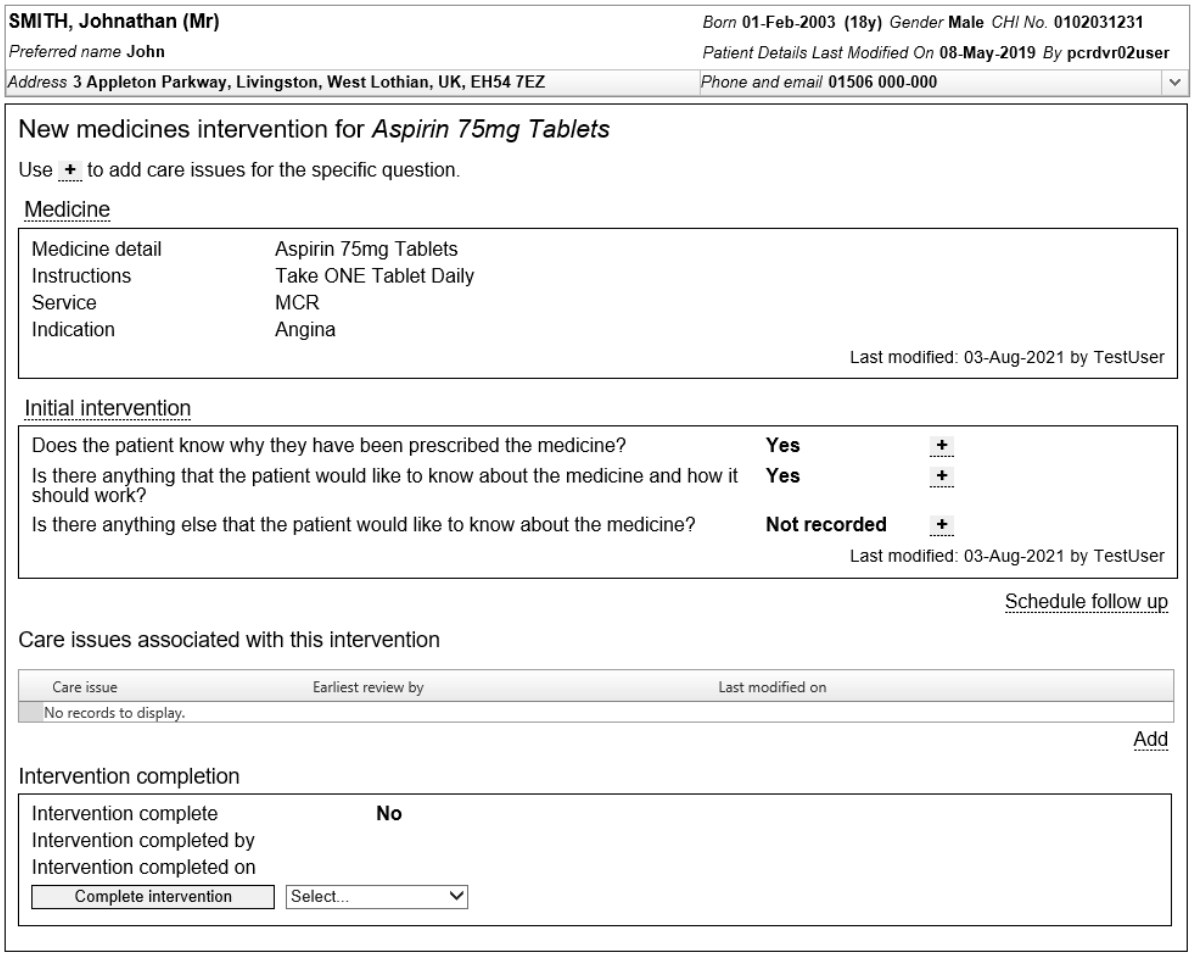


Figure 8-4: New Medicines interventions review page

Options from the new medicines intervention review page are:

- Schedule a follow-up intervention
- Edit a follow-up intervention (If one exists)
- Edit an initial intervention
- Add a care issue / care issue outcome and associate with a new medicine intervention record
- Selecting a reason for completion and set status to completion

Note: *If intervention is set to complete. Data on the review page is read only. However, it is still possible to create care issues for a completed intervention.*

8.6 Schedule a follow up intervention

Having started an initial intervention (see section 8.2) you can create subsequent follow-up intervention records.

An “In person” follow up intervention is when the patient will visit the pharmacy to provide follow up information on the use of their newly prescribed medicine. Alternatively, the follow up intervention can be conducted “By telephone”.

To schedule an “In person” follow up intervention:

- Select the “Schedule follow up” link from the new medicine interventions review page (Figure 8-5), the system will display a “Schedule follow up” pop up form (Figure 8-6)

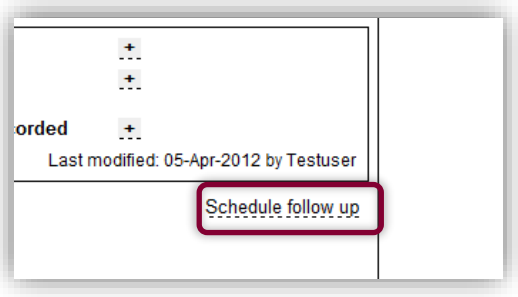


Figure 8-5: “Schedule follow up” link

- Use the date picker in the pop up form (Figure 8-6) to select the date you have agreed with the patient for the follow up intervention to take place,
- Add free text details of the timeslot if required (e.g. after 1pm)
- Select “In person” as the contact method

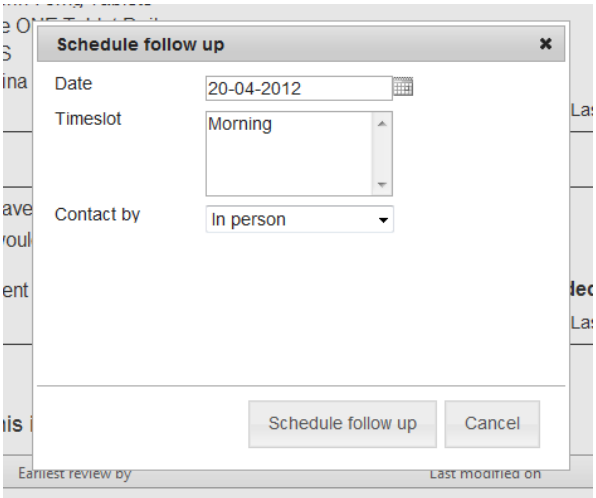


Figure 8-6: Schedule follow up pop up dialogue

- Select the “Schedule follow up” button on the pop up form, the follow up intervention will be added to PCR and the new medicine interventions review page will be refreshed to show the “In person” follow up record that has been created (Figure 8-7)

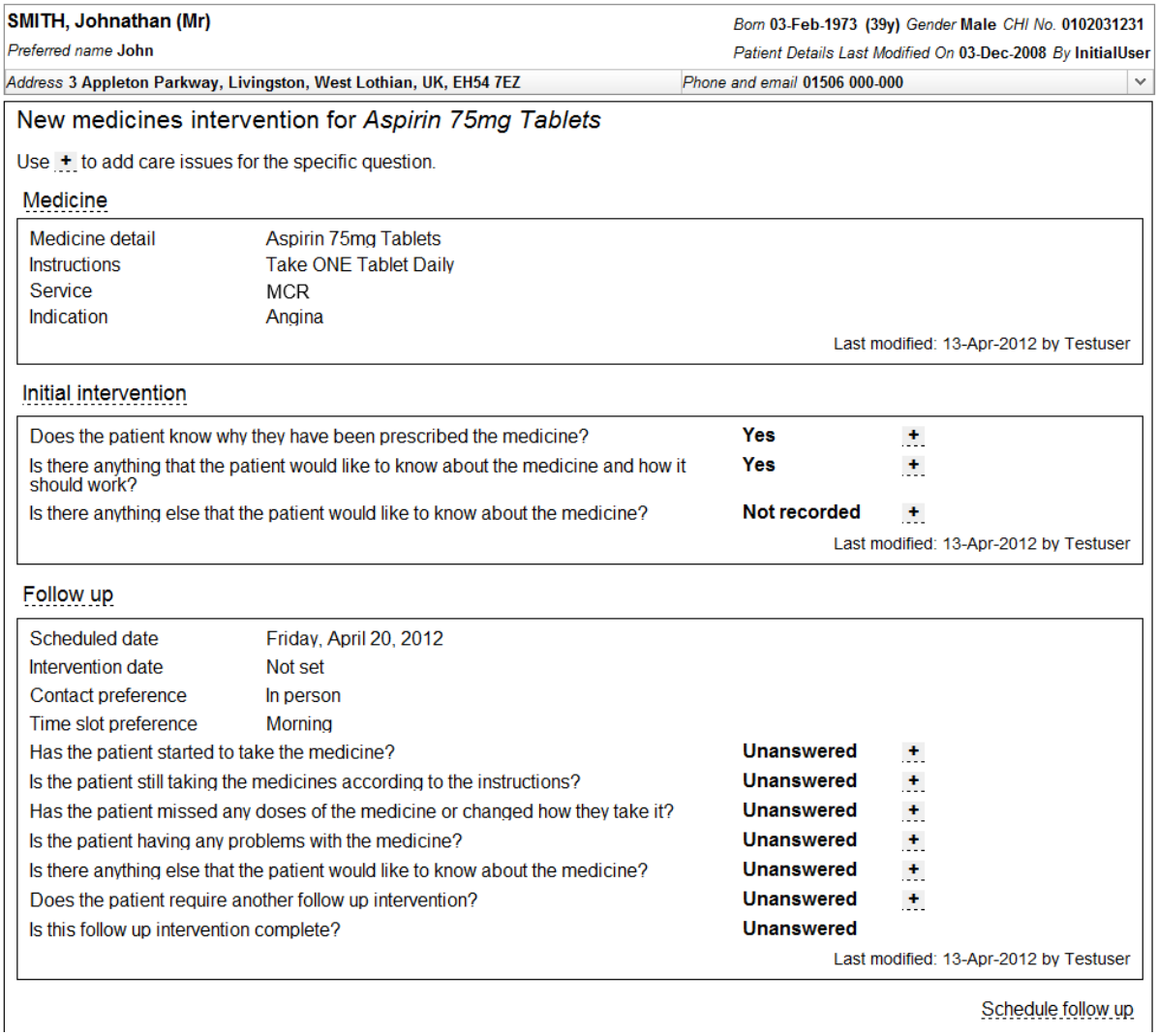


Figure 8-7: Follow up record shown on review page

To schedule a "By Telephone" follow up intervention:

- Select the "Schedule follow up" link from the new medicine interventions review page (Figure 8-5), the system will display a "Schedule follow up" pop up form (Figure 8-6)
- Use the date picker in the pop up form to select the date you have agreed with the patient for the follow up intervention to take place
- Add free text details of the timeslot, if required (E.g. after 1pm)
- Select "By telephone" as the contact method, the pop up form will automatically extend to display existing contact telephone information and a box to add an alternative contact telephone number (Figure 8-8)

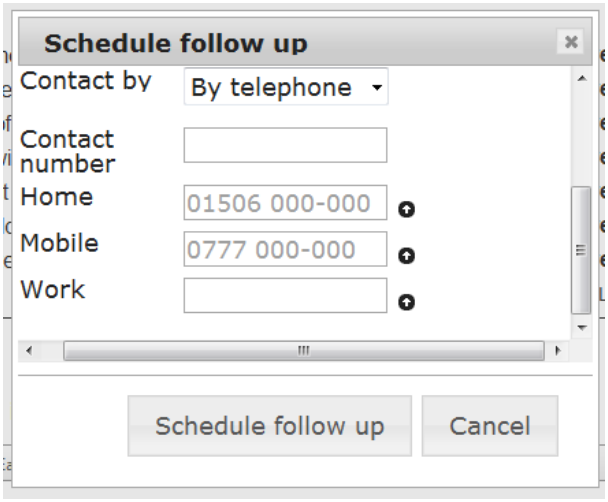


Figure 8-8: Schedule follow up "By Telephone"

Note: *Date and timeslot are mandatory*

User Options

- Use the arrow buttons ( ) to copy an existing telephone number (held in the patient profile) for the patient to use as the contact number for the follow up intervention; or
- Enter another number in the "contact number" box to use for the follow up intervention record.

- Select the "Schedule follow up" button on the pop up form, the follow up intervention will be added to PCR and the new medicine interventions review page will be refreshed to show the "By telephone" follow up record that has been created, this will be identical to that shown in Figure 8-7 with the exception that the contact preference is set to 'By Telephone' and the contact number is displayed.

8.7 Complete a follow up intervention

Having already scheduled a follow up intervention, use the following procedure when the patient has been successfully contacted by Telephone or is present in the pharmacy.

Note: *You may decide to record the follow-up intervention details offline while speaking to the patient and update PCR later. If this is the case it is very important that the "intervention date" represents the date you actually recorded the information and not when you updated PCR.*

To complete a follow up intervention:

- Identify the patient in PCR and navigate to the review/summary page of the New Medicine intervention and select the follow-up link shown in Figure 8-9.

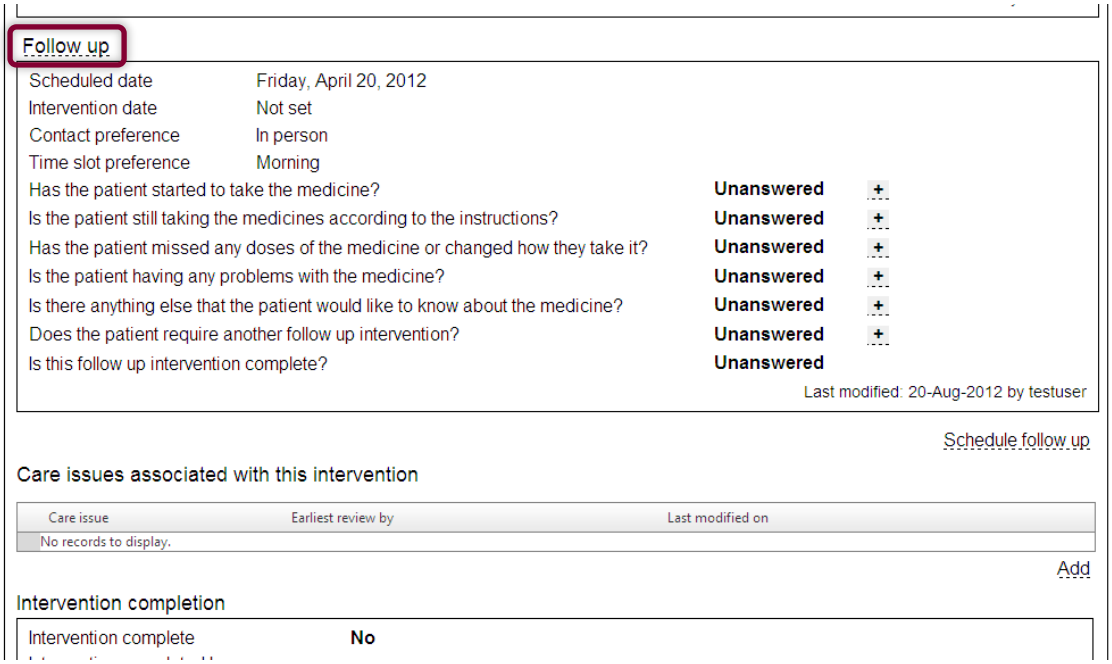


Figure 8-9: Select link to edit follow up intervention

- The follow-up intervention edit page will be shown, Figure 8-10.

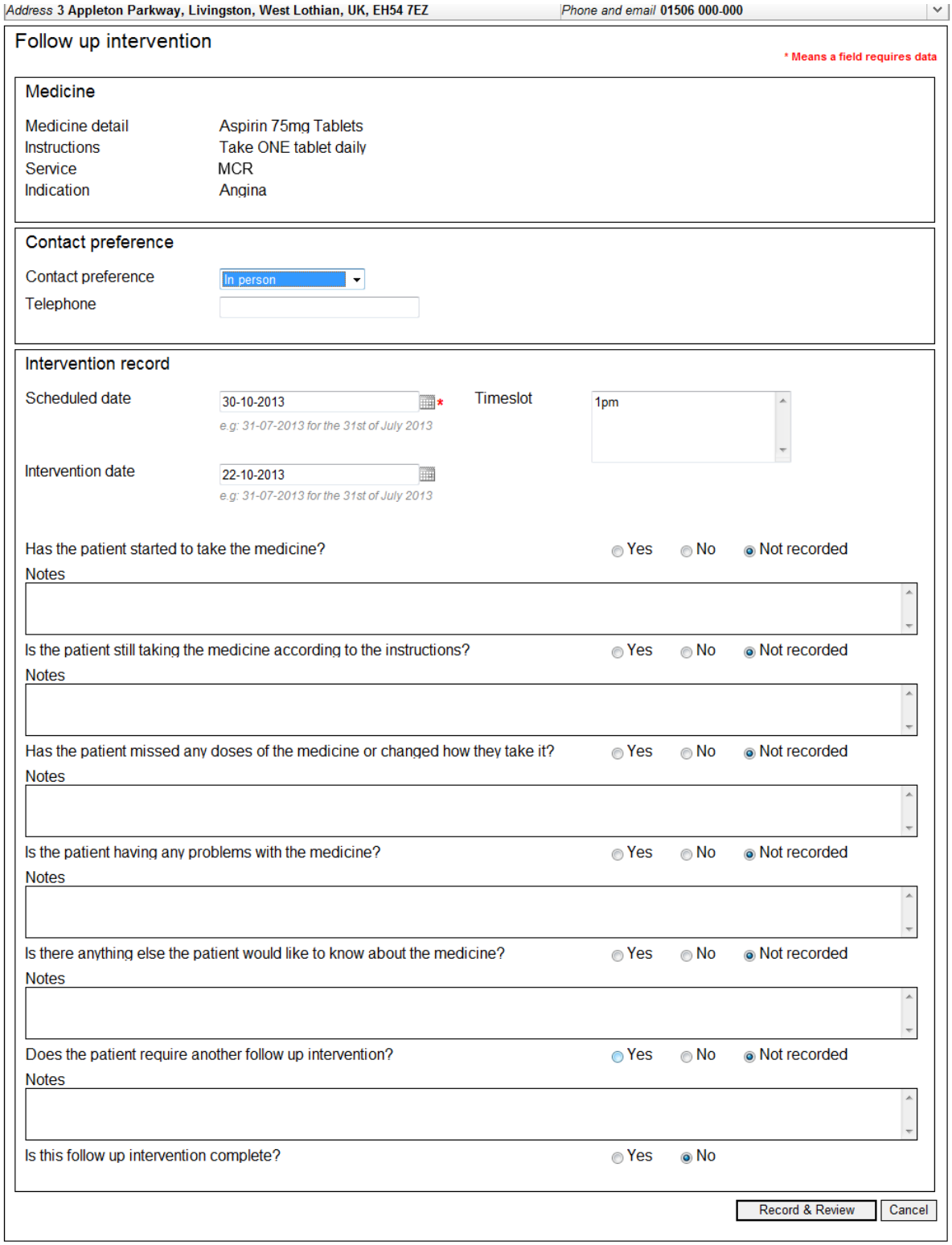


Figure 8-10: Edit follow up intervention details

Editing options

To change the scheduled date only:

You may decide to edit the follow up intervention to change the scheduled date only.

- Enter new scheduled date
- Select the “Record & Review” button to save your answers and return to the new medicine intervention review page, Figure 8-11.

To answer the follow up questions:

- Confirm that the intervention date is correct. This is the date you met with the patient in person or spoke to the patient by phone. The intervention date will always default to “Today”. You may need to change it if you are entering the details retrospectively.

- Answer the first six follow up intervention questions using the radio buttons: ‘Yes’, ‘No’ or ‘Not recorded’. You may optionally add text notes against each question:

    - Has the patient started to take the medicine?

    - Is the patient still taking the medicine according to the instructions?
    - Has the patient missed any doses of the medication or changed how they take it?
    - Is the patient having any problems with the medication?
    - Is there anything else that the patient would like to know about the medicine?
    - Does the patient require another follow up intervention?

- Answer the final question using the radio buttons: ‘Yes’ or ‘No’ only.:

    - Is the follow up intervention complete?

Note: If you answer yes to the final question this is only an indication that you are satisfied the intervention is complete. This will not complete the overall intervention and all questions can still be edited. To complete the overall intervention, see section 6.10.

User options:

- Select the “Record & Review” button to save your answers and return to the new medicine intervention review page, Figure 8-11
- Select the “Cancel” button to exit without saving any changes and return to the new medicine intervention review page.

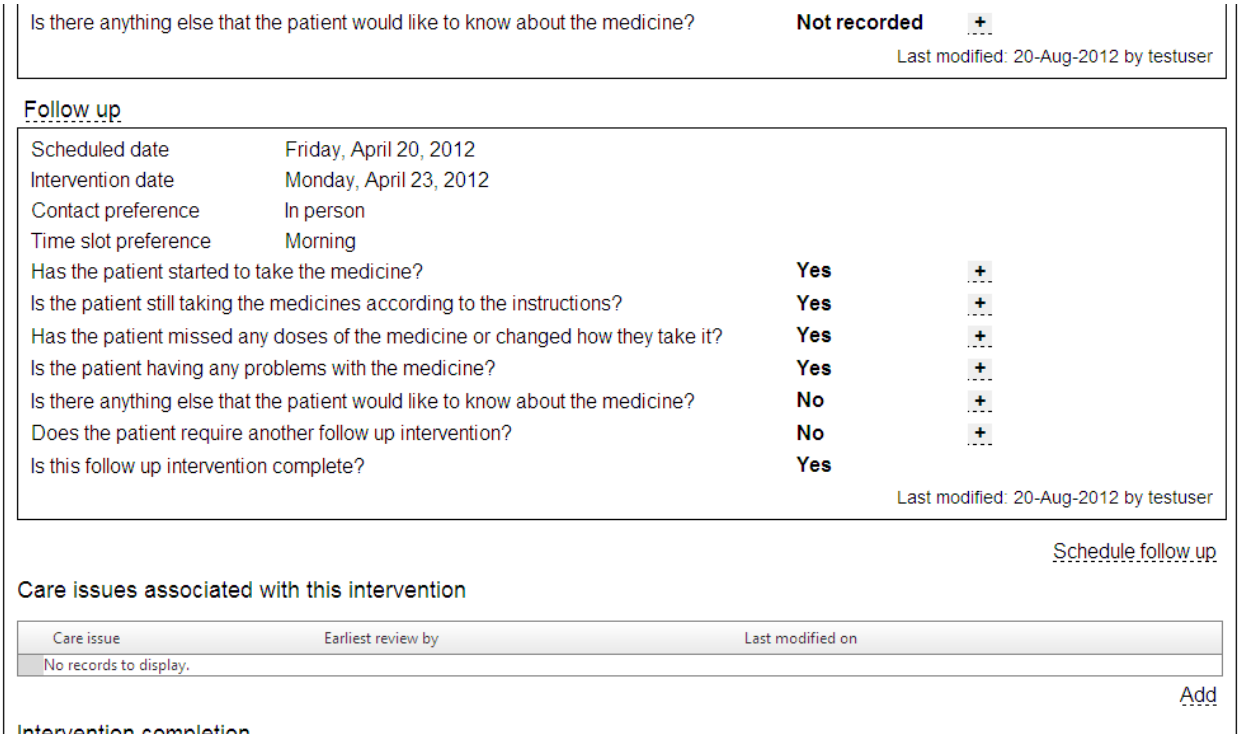


Figure 8-11: New medicine intervention review page with completed follow up intervention

8.8 Add care issue / care issue outcome

Care issues and care issue outcomes can be added from links within the new medicine interventions review page. There are two options to consider when adding a care issue / care issue outcome:

- Associate with new medicine intervention
- Associate with new medicine intervention based on the context of an intervention question

Note: *All care issues are associated to the intervention record not the question.*

To add a care issue / care issue outcome:

- Select the “Add” link at the bottom right hand side of the care issues section of the new medicine interventions review page (Figure 8-12)

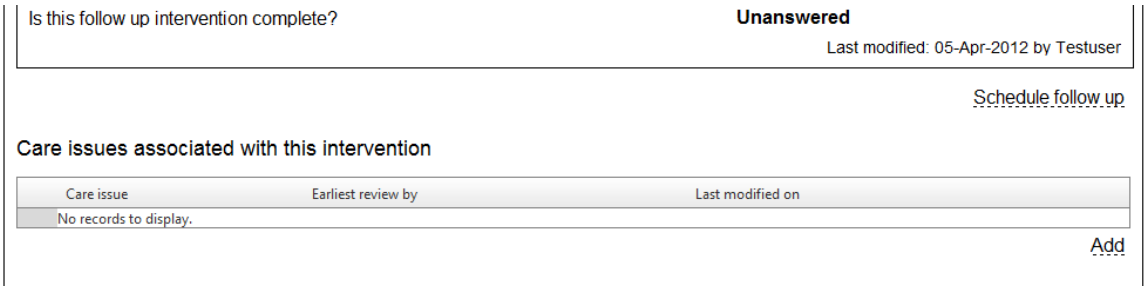


Figure 8-12: Care issues associated with a new medicine intervention

- The “Record care issues for new medicine intervention” page will be displayed (Figure 8-13)

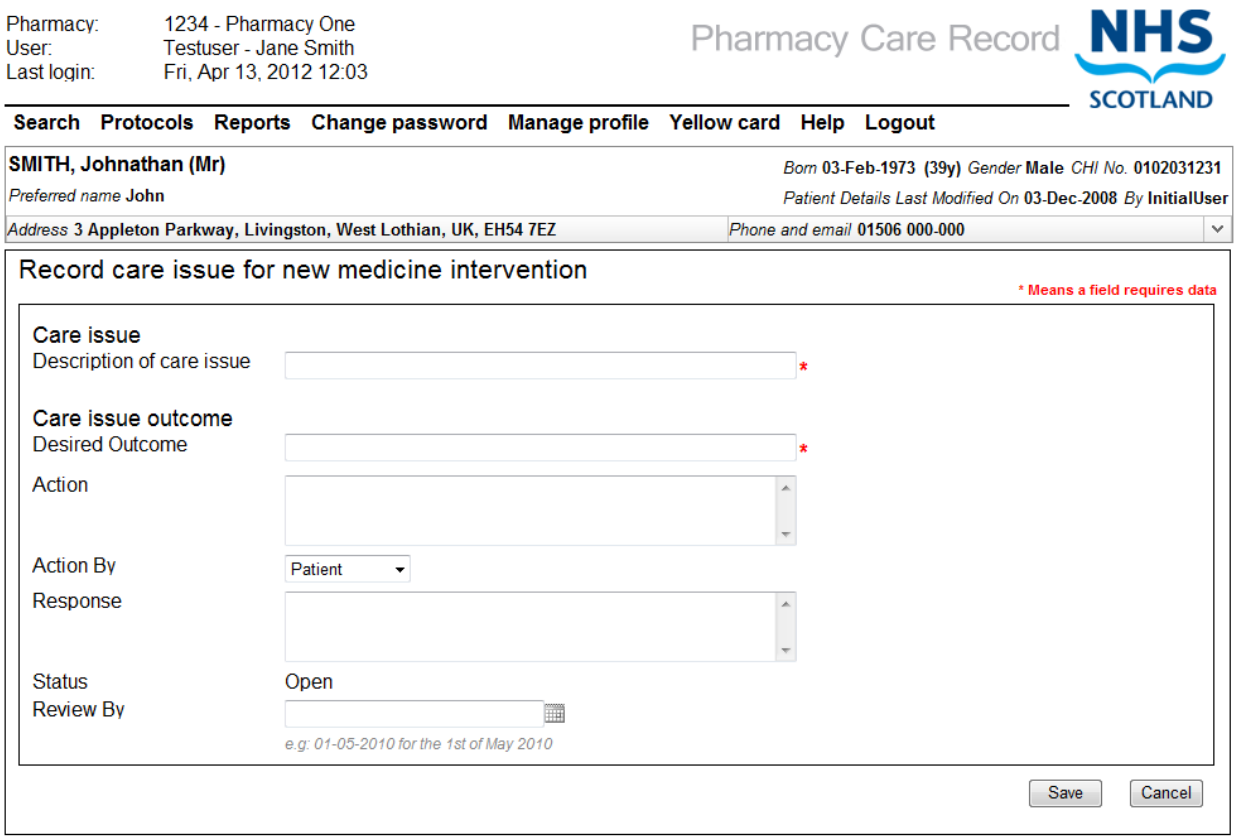


Figure 8-13: Record care issues for new medicine intervention

- Enter the details of the care issue and care issue outcome and click the “Save” button.

Note: *Description and desired outcome are always required.*

- The care issue and care issue outcome information is saved in PCR and the new medicine intervention review page is displayed. A summary of the added care issue is shown on the review page (Figure 8-14)

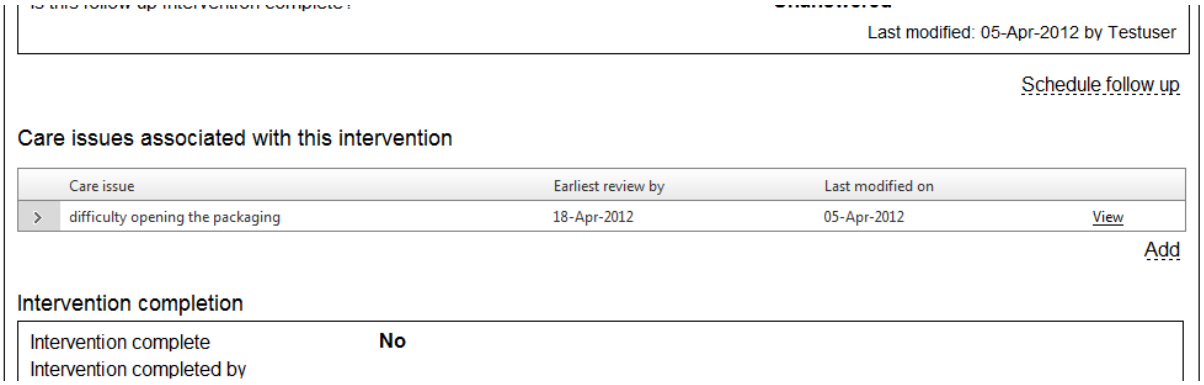


Figure 8-14: Summary of added care issue

To add a care issue / care issue outcome with context to a specific intervention question:

- Select the + link next to a specific question listed on the new medicines intervention review page. (Figure 8-15)

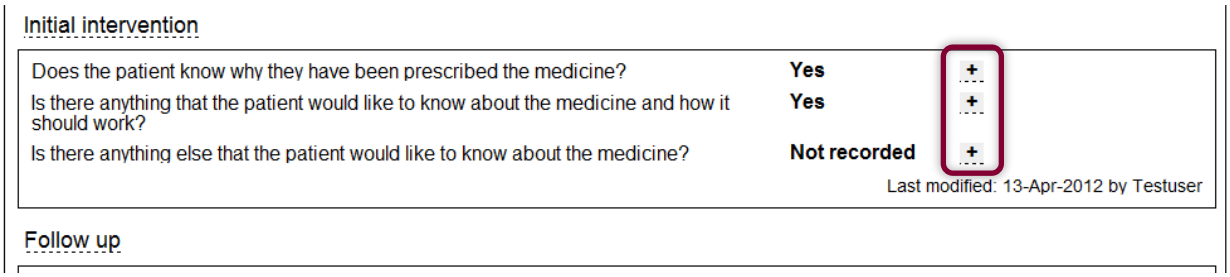


Figure 8-15: Link to add a question-specific care issue

Note: *Initial intervention is shown in the above example. These links exist for follow up intervention questions too.*

- The "Record care issues for new medicine intervention" page will be displayed and the description of care issue and desired outcome input boxes will be prepopulated with default text (Figure 8-16)

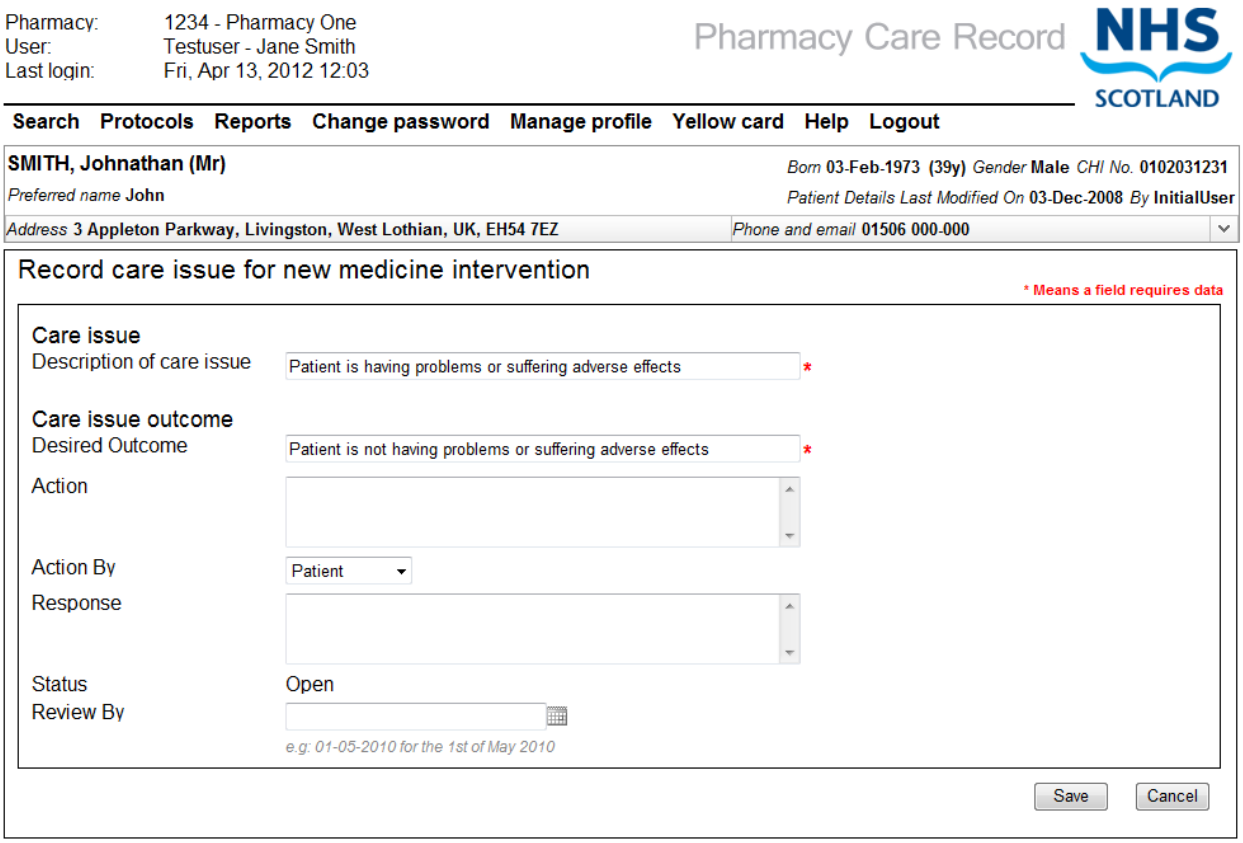


Figure 8-16: Record care issue

- Enter the details of the care issue and care issue outcome and click the "Save" button.

- The care issue and care issue outcome information is saved in PCR and the new medicine intervention review page is displayed. A summary of the added care issue is shown on the review page (Figure 8-14)

Note: *Selecting the cancel button will display the new medicine interventions review page – no data will be saved.*

8.9 Complete a new medicine intervention record

A new medicine intervention can be completed in the following circumstances:

- Patient is adhering
- Patient is not adhering
- Patient lost to follow up

To set the status of a new medicine intervention to complete:

- Select a reason from the dropdown menu in the “Intervention Completion” section of the review page (Figure 8-17).

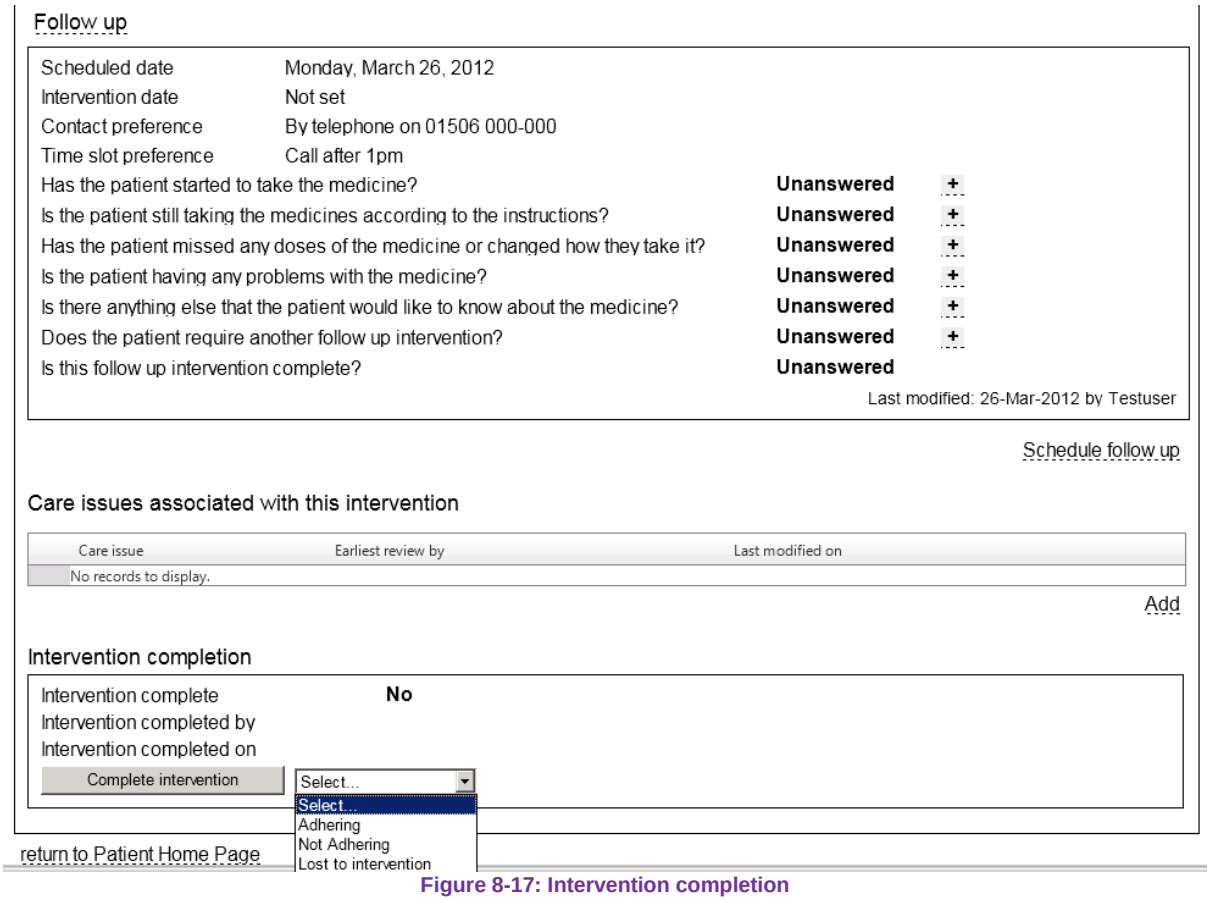


Figure 8-17: Intervention completion

- Select the “Complete intervention” button, the page will refresh and the intervention completion information will be updated (Figure 8-18)

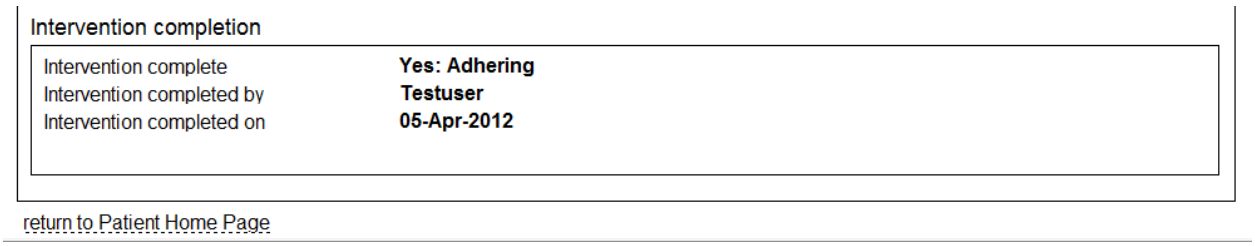


Figure 8-18: Intervention completion information displayed

8.10 Summary of new medicine interventions for an individual patent

The new medicine interventions tab on the patient home page shows a summary of all new medicine interventions for a patient (Figure 8-19).

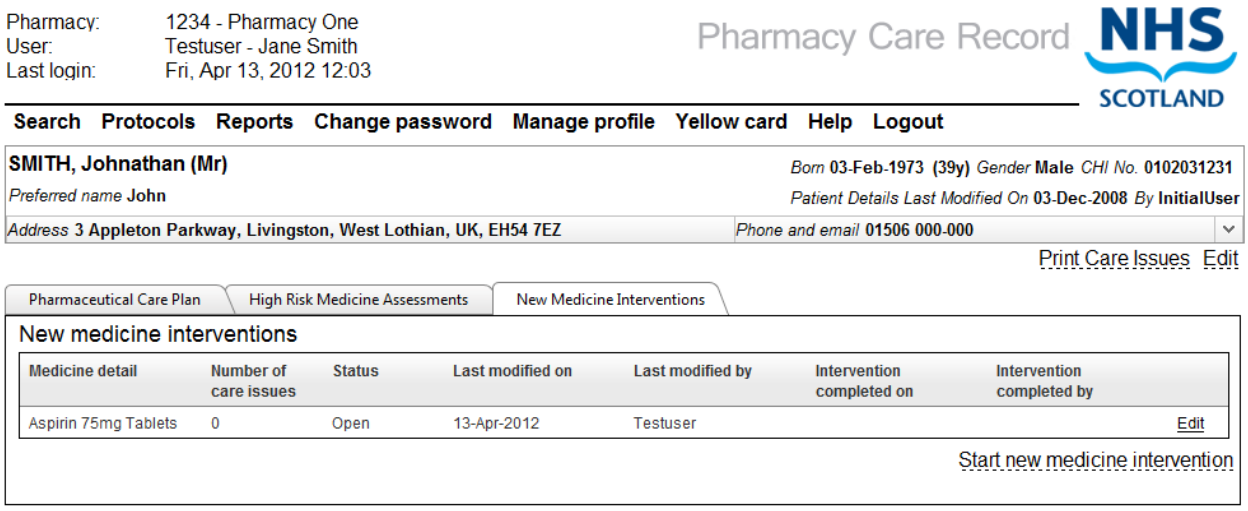


Figure 8-19: New medicine interventions summary on patient home page

This tab shows the following data:

- Medicine detail
- Number of care issues
- Status (mouse over to display completed reason)
- Last modified on
- Last modified by (hover to display full name of user)
- Intervention complete on
- Intervention complete by (hover cursor to display full name of user)
- “Edit or View” link, navigates to new medicine interventions review page (*Edit* if status is “open” *View* if status is “Completed”)

9 Gluten-free foods annual health check (Support tool)

9.1 Overview

A Gluten-free foods annual health check can be created by pharmacists and pharmacy technicians for patients that are known to be following a Gluten-free diet.

The health check consists of a series of grouped questions and answers with the option to select an “Outcome” based on the patient’s response to the questions. Each question group is supported by protocol guidance.

The questions groups are:

- Concordance
- Interactions and precautions
- Adverse effects
- Monitoring

A patient can have multiple gluten-free foods annual health checks over time.

Question groups can be answered in sequence, completed individually, or reviewed and updated at any point prior to completion. Not all question groups need to be completed at the same time. Individual questions/outcomes or question groups can be completed, saved and returned to at a later point in time.

Care issues and care issue outcomes can be associated with Gluten-free support tool assessments; these can be viewed alongside standard care issues as well as with the associated Gluten-free foods annual health check

A gluten-free foods annual health check care issue and care issue outcome can be created with prepopulated text based on the context of an individual health check question. They can also be created independent of the questions – without prepopulated text.

The gluten-free foods annual health check can have a status of Open or Completed. Care issues and care issue outcomes can continue to be added and updated to a completed gluten-free foods annual health check.

Note: Assessment outcomes (e.g. advice given, need for referral etc.), together with any associated care issues must be communicated to the patient’s GP. This can be done using the SBAR feature (Section 10). Please refer to the latest NES GFFS resource pack for more information.

9.2 Start a Gluten-free foods annual health check (support tool)

To start a Gluten-free foods annual health check:

- Select the “Support tools” tab on the patient home page (Figure 9-1)
- Select the “Start support tool assessment” link, the “Support tool selection” page will be displayed (Figure 9-2)

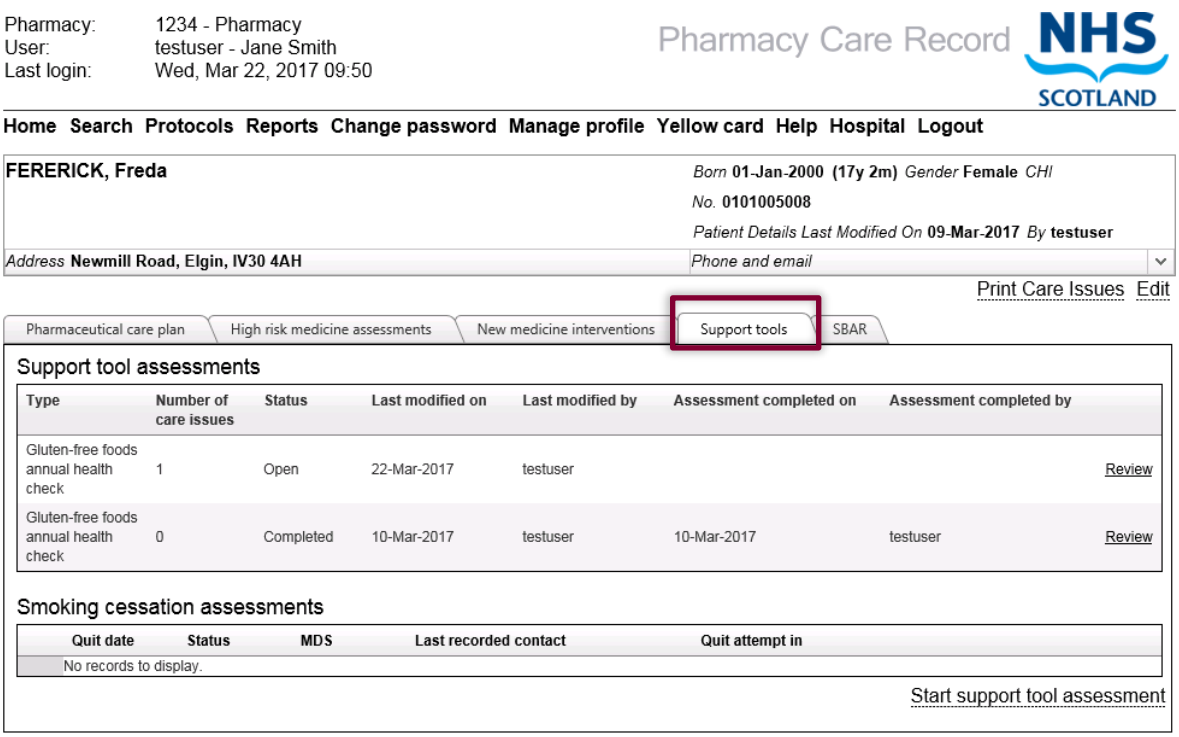


Figure 9-1: Support tools tab

- Select “Gluten-free foods annual health check” from the dropdown menu
- The “Concordance” page is displayed

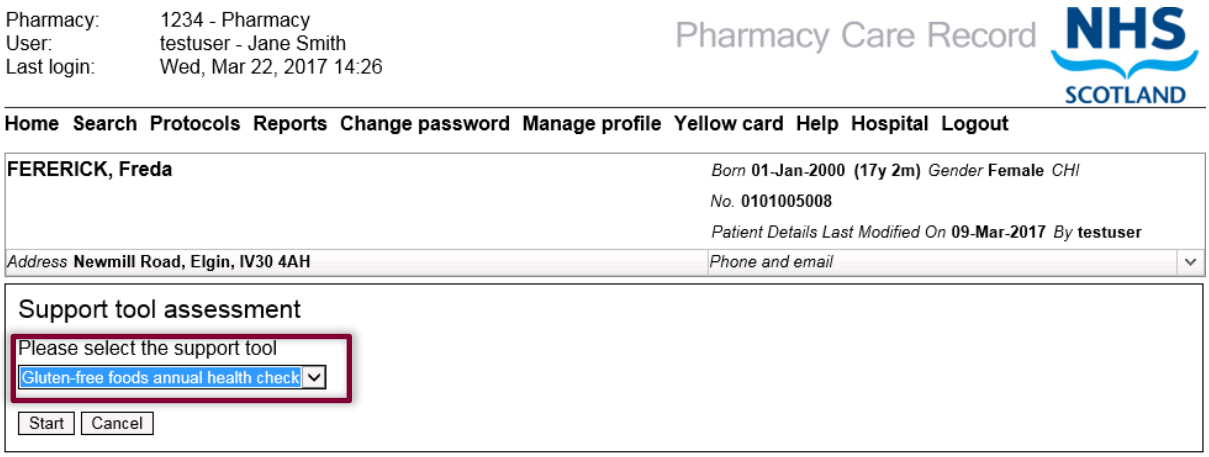


Figure 9-2: Support tool selection

By selecting the "Start" button (Figure 9-2), this will create a new Gluten-free foods annual health check within PCR. Selecting the "Cancel" button will return the system to the patient home page – a Gluten-free foods annual health check will not be created.

9.3 Create a Gluten-free foods annual health check

Having completed the steps in section 9.2, this section guides you through the procedure to create and save a Gluten-free foods annual health check.

All questions are mandatory. If an answer is not selected an error message will be displayed when either the "Next" or "Save & review" buttons are selected. It is not possible to navigate to the next questions screen or the "review" screen unless an answer is provided for each question.

Outcomes are not mandatory but can be selected if required.

Protocol guidance text is displayed on the right-hand side of each question page.

Step 1 – Answer "Concordance" Questions:

- Provide an answer to all questions on the "Concordance" page by selecting either 'Yes' or 'No' for each question, Figure 9-3.
- Select any applicable Outcomes by clicking the relevant checkbox.

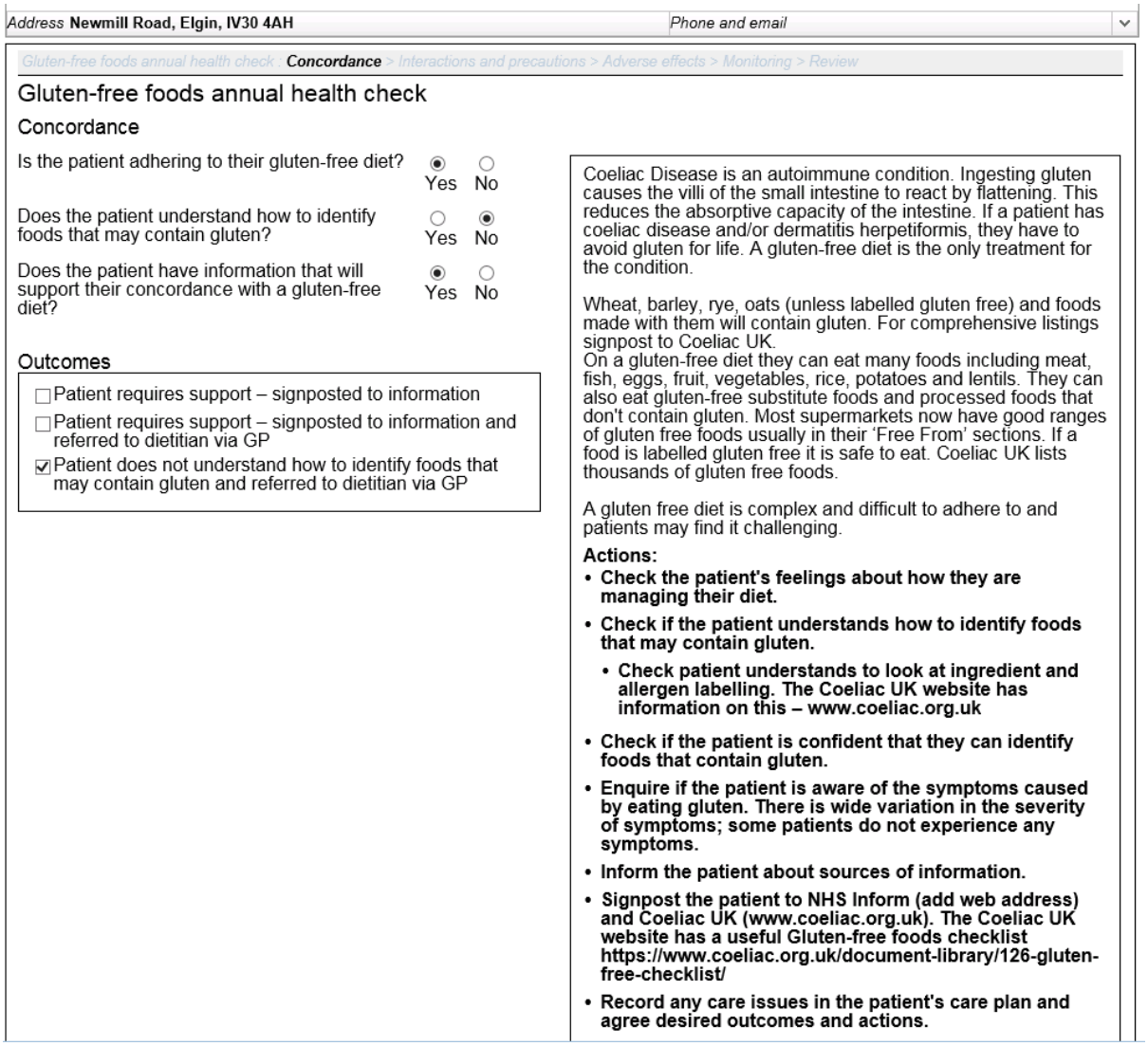


Figure 9-3: Concordance

User Options:

- Select the "Next – Interactions & Precautions" button; The system will save entered data and navigate to the "Interactions & Precautions" page.
- Select the "Save & Review" button; The system will save entered data and navigate to the "Review" page for the selected assessment.

Step 2 – Answer "Interactions & Precautions" Questions:

- Provide an answer to all questions on the Interactions & Precautions page by selecting either 'Yes' or 'No' for each question, Figure 9-4.
- Select any applicable Outcomes by clicking the relevant checkbox.

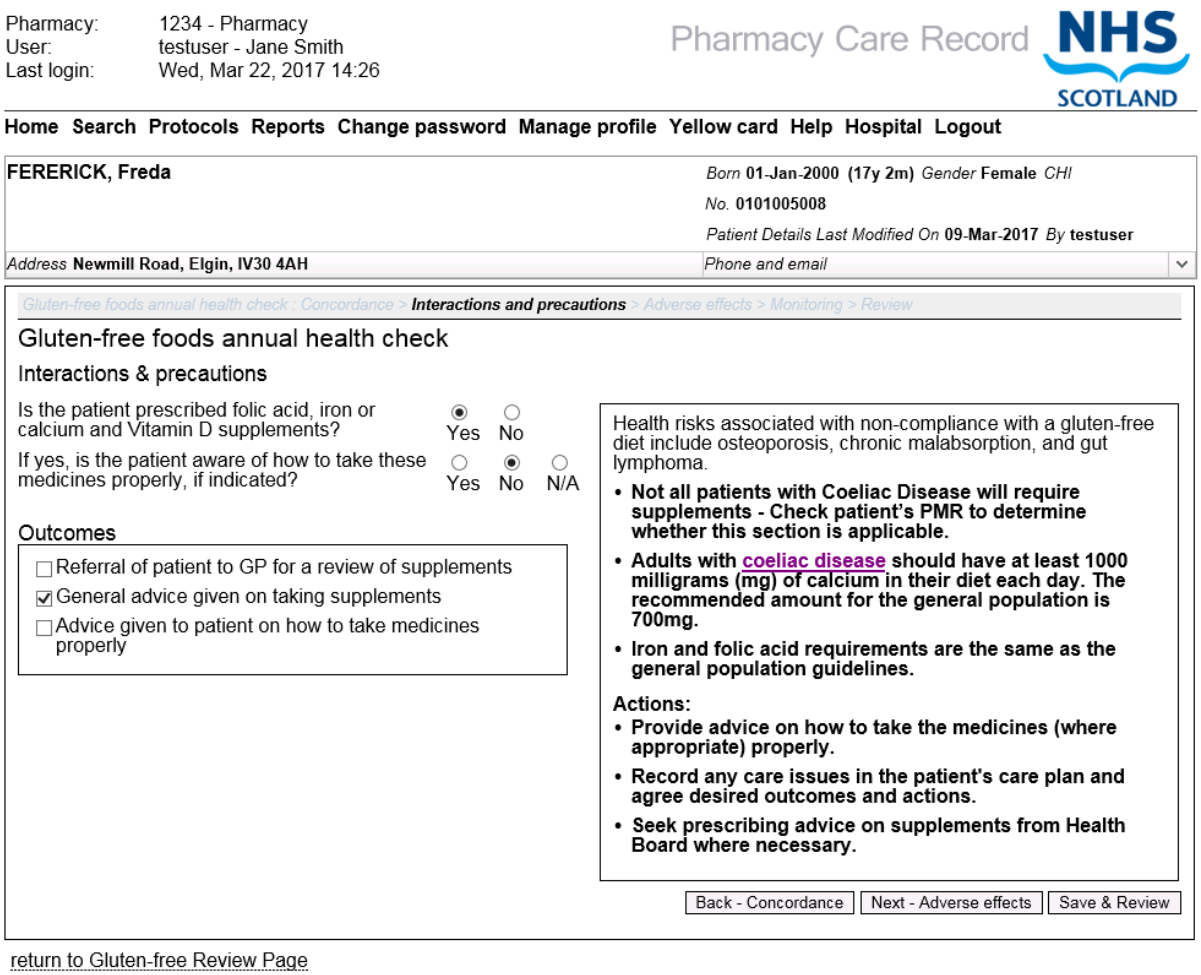


Figure 9-4: Interactions and Precautions

User Options:

- Select the “Back – Concordance” button; the System will save entered data and navigate to the “Concordance” screen.
- Select the “Next – Adverse effects” button; the system will save entered data and navigate to the “Adverse effects” screen
- Select the “Save & Review” button; The system will save the question answers and navigate to the “Summary” screen for the assessment

Step 3 – Answer “Adverse effects” Questions:

- Provide an answer to all questions on the Adverse effects page by selecting either ‘Yes’ or ‘No’ for each question, Figure 9-5.
- Select any applicable Outcomes by clicking the relevant checkbox.

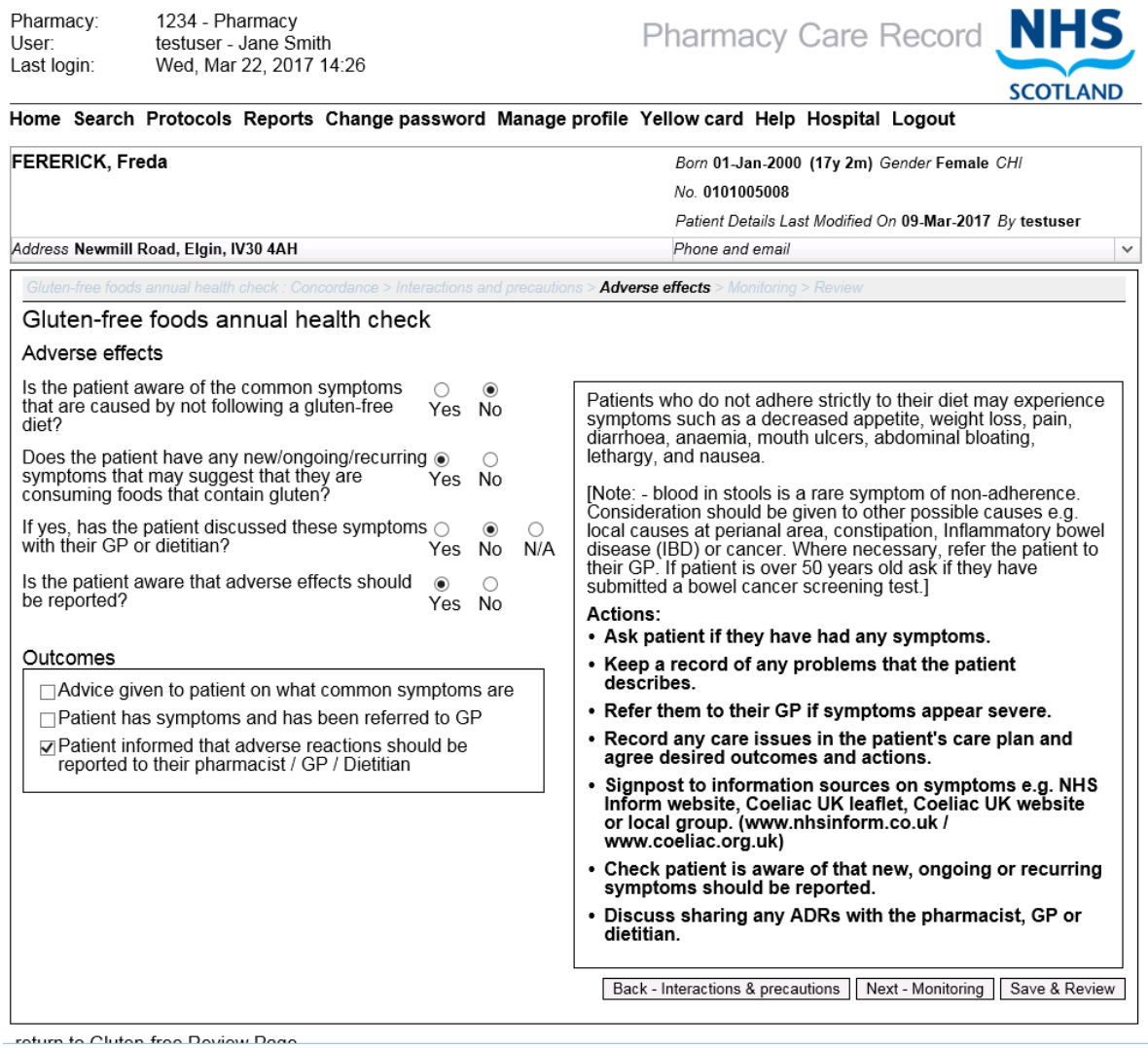


Figure 9-5: Adverse effects

User Options:

- Select the “Back – Interactions & precautions” button; the System will save entered data and navigate to the “Interactions & precautions” page.
- Select the “Next – Monitoring” button; the system will save entered data and navigate to the “Monitoring” page.
- Select the “Save & Review” button; the system will save the question answers and navigate to the “Summary” page for the assessment.

Step 4 – Answer "Monitoring" Questions:

- Provide an answer to all questions on the Monitoring page by selecting either 'Yes' or 'No' for the first question and completing relevant details about the Gluten-free annual health check and height and weight information, Figure 9-6.
- Select any applicable Outcomes by clicking the relevant checkbox.

Note: See below for additional information on completing this page.

- Select "Save and review" the Gluten-free support tool assessment summary page is displayed

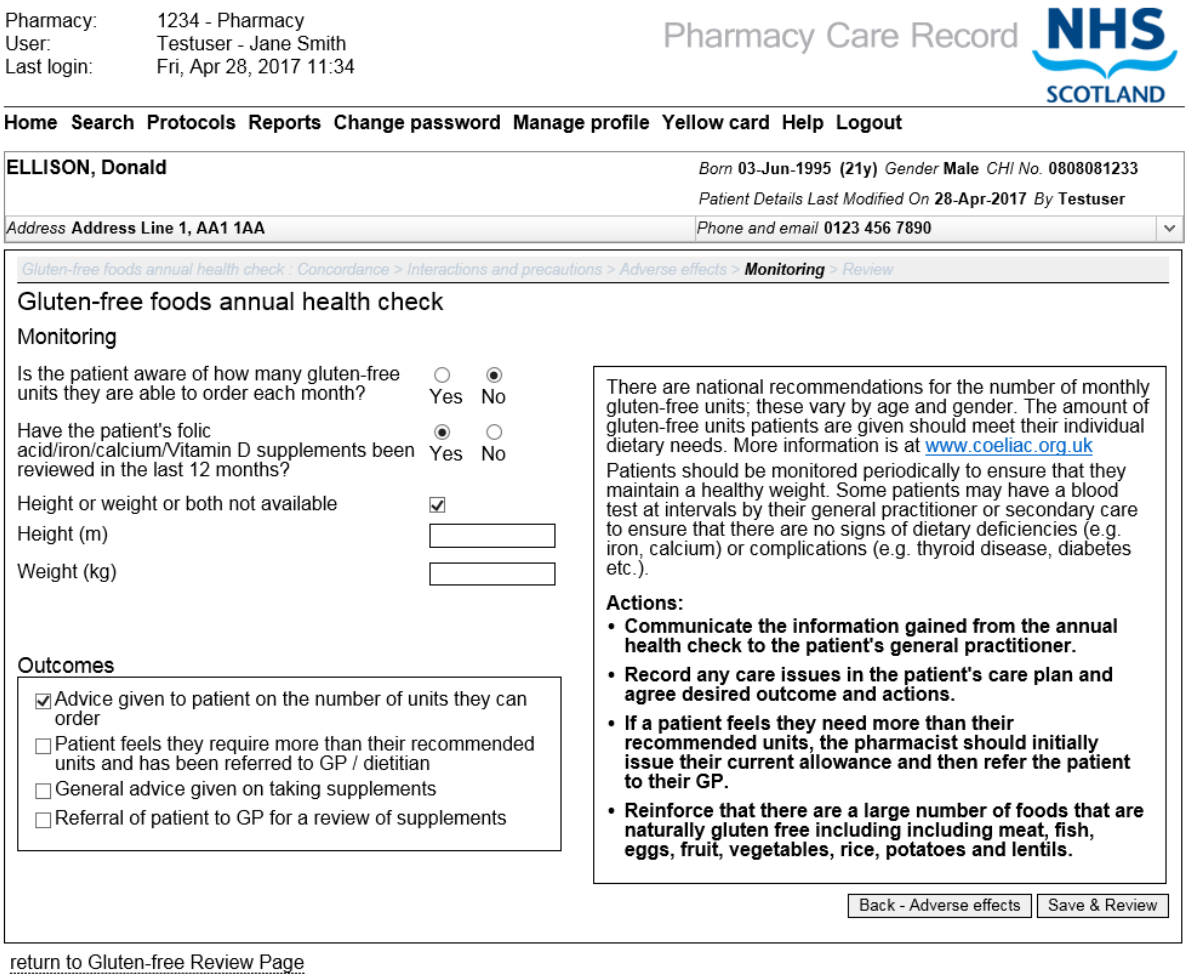


Figure 9-6: Monitoring

(Note: Height and weight are mandatory unless "Height or weight or both not available" checkbox is selected.)

User Options:

- Select calculator icon to calculate BMI (if height and weight entered).
- Select the "Back – Adverse effects" button; The system will navigate to the "Adverse reactions" page.

- Click the “Save & Review” button. The system will navigate to the “Summary” page, Figure 9-7

9.4 Gluten-free foods annual health check summary page

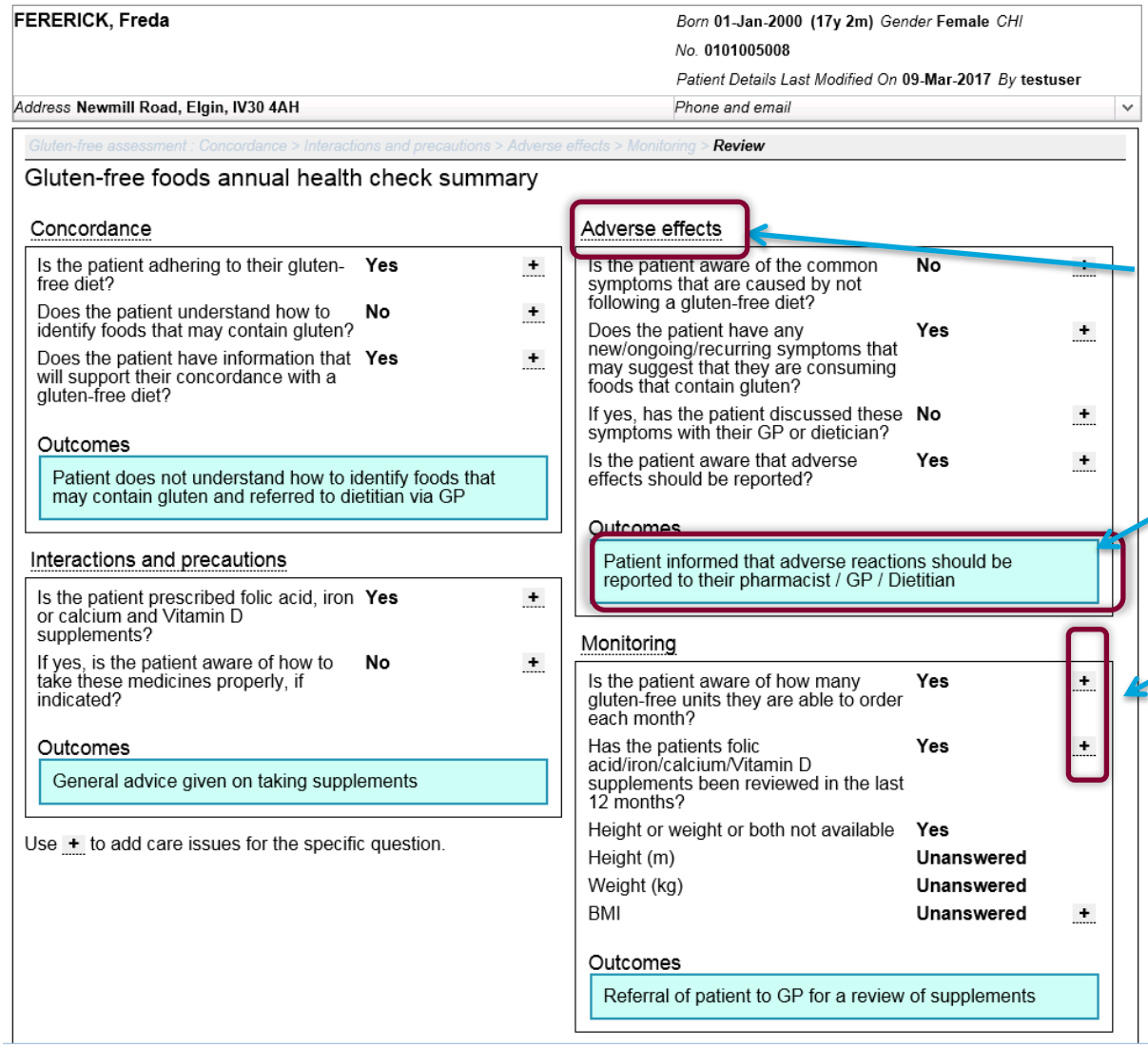


Figure 9-7: Gluten-free health check support tool summary page

Outcomes are displayed beneath each section.

Care issues associated with the annual health check are shown below the questions summary.

The assessment completion status is shown at the bottom of the page.

9.5 Create associated Care Issue and Care Issue Outcomes using prepopulated text

Selecting a link next to a question on the Gluten-free summary page will populate the care issue with default text.

Note: *This option does not mean that the care issue is associated with the actual question – the association is at assessment level.*

Step 1: Select link

- Select a + link for the question on the Gluten-free foods annual health check Summary page that you want to create a care issue / care issue outcome for, (Figure 9-8)

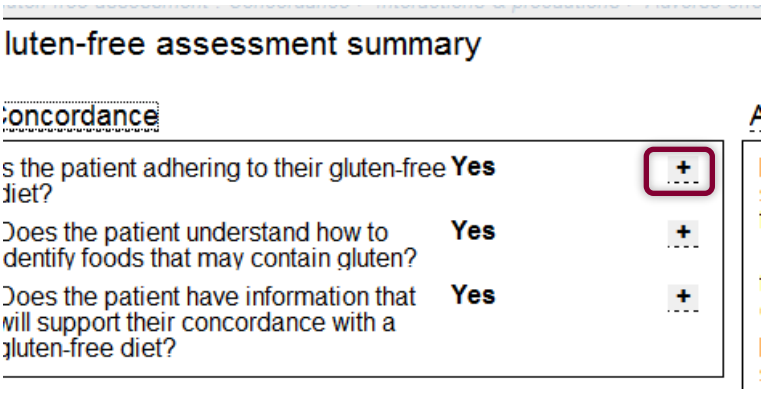


Figure 9-8: Add Care Issue / Care Issue Outcome link

- The system will display the support tool assessment “Record care issue” page (Figure 9-9)

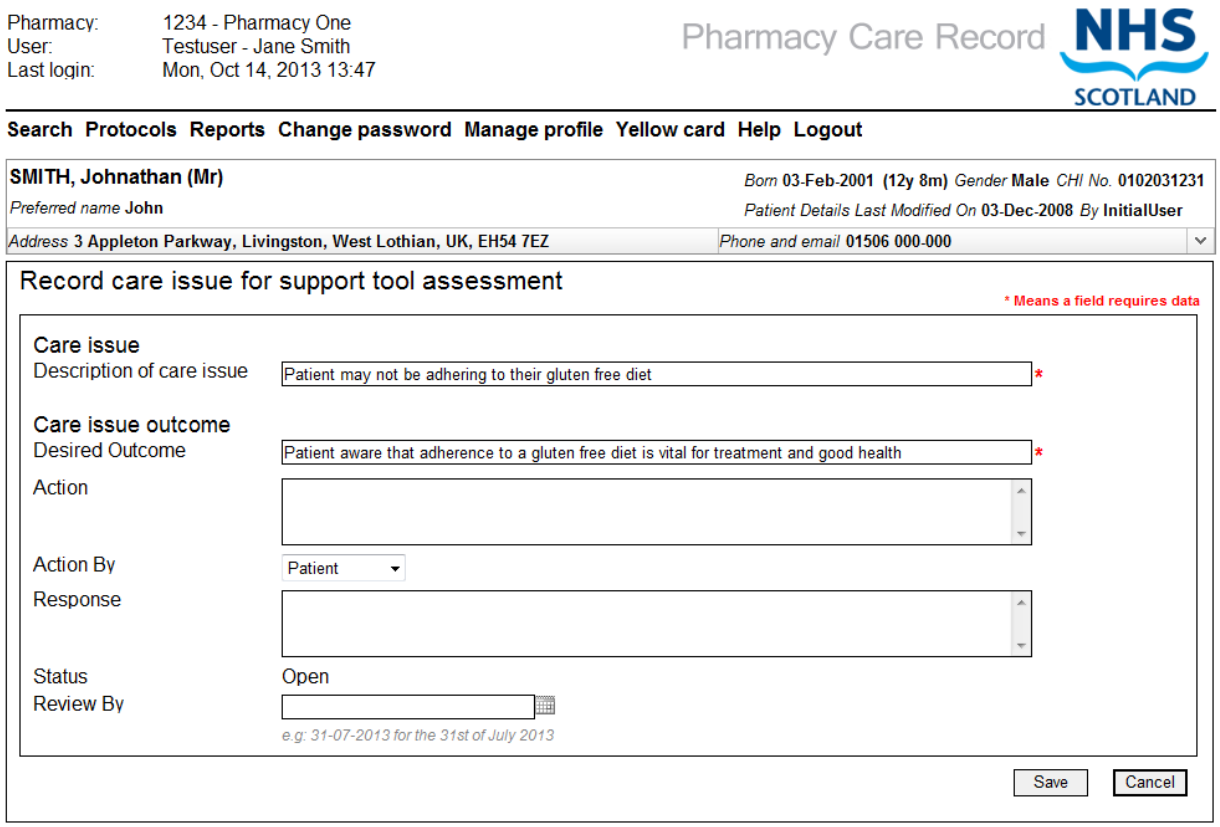


Figure 9-9: Gluten-free "Record care issue" screen

***Note:** The "description of care issue" text input box and the "Desired outcome" text input box will be prepopulated with default text. This text can be modified.*

9.6 Create associated care issue and care issue outcome using the "Add" link

This option allows you to add an associated Care Issue (with the assessment), but without prepopulating any text.

Step 1: Select "Add" link

- Select the "Add" link at the bottom of the "Care issues associated with this assessment" grid on the Gluten-free foods annual health check page, Figure 9-7.
- The care issue form is displayed (Figure 8-10)

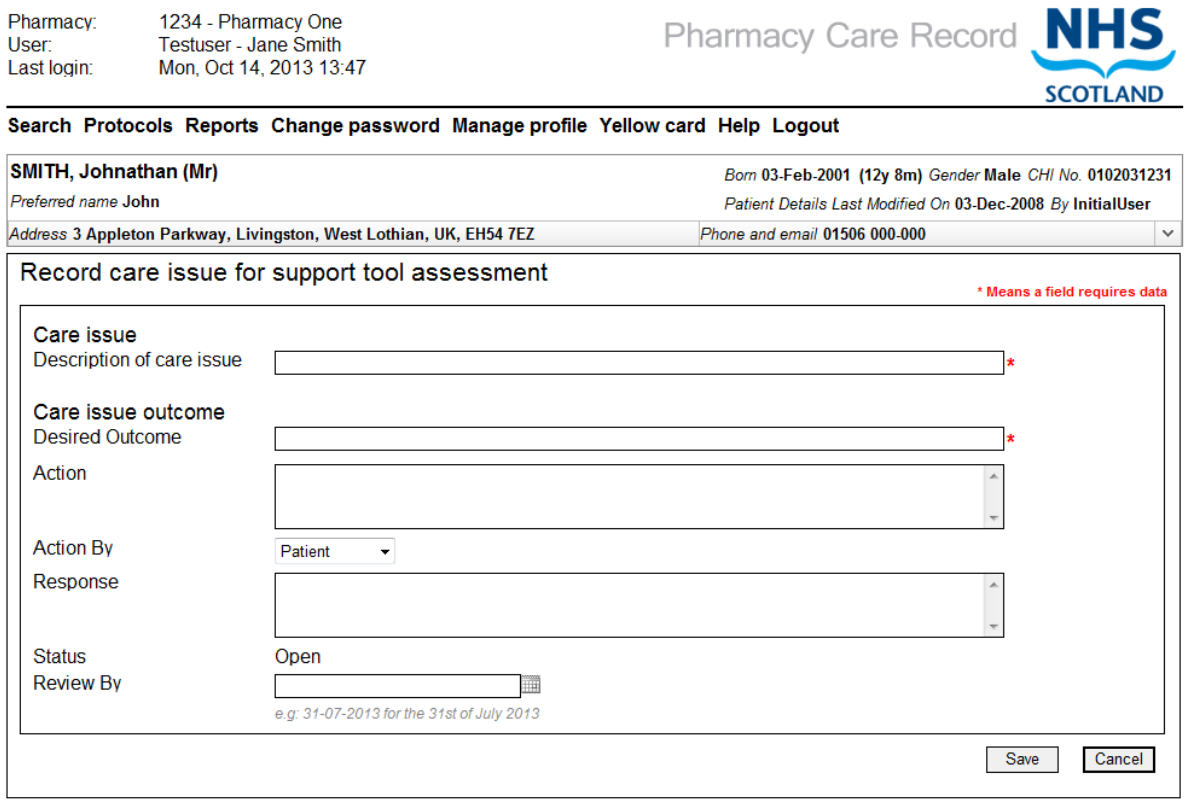


Figure 9-10: Record care issue using "Add" link

Step 2: Enter form details

Enter relevant details into the form:

- Description of care issue (Mandatory)
- Desired Outcome (Mandatory)
- Action
- Action By
- Response
- Status (Display Text)
- Review by

Step 3: Save details

- Click "Save"
- The system will add the care issue / care issue outcome to the PCR database and navigate to the "Gluten-free foods annual health check summary page"
- The newly created care issue / care issue outcome will be listed in the "care issues associated with this assessment" grid (Figure 7-16, Figure 9-12)

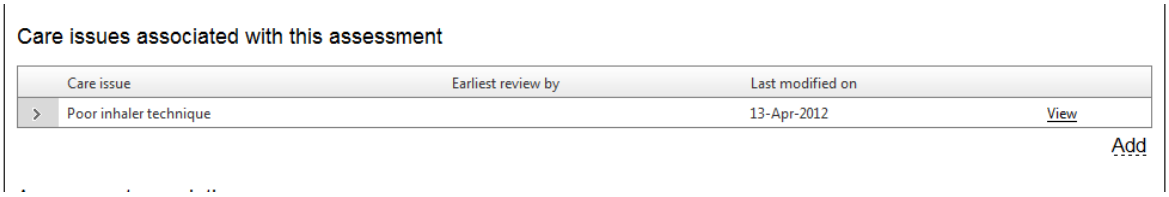


Figure 9-11: Associated care issues

Note: *Because this care issue is not associated with a particular question, there is no prepopulated text in the form.*

***Note:** If the entered "Review by" date is in the past a warning message will be displayed.*

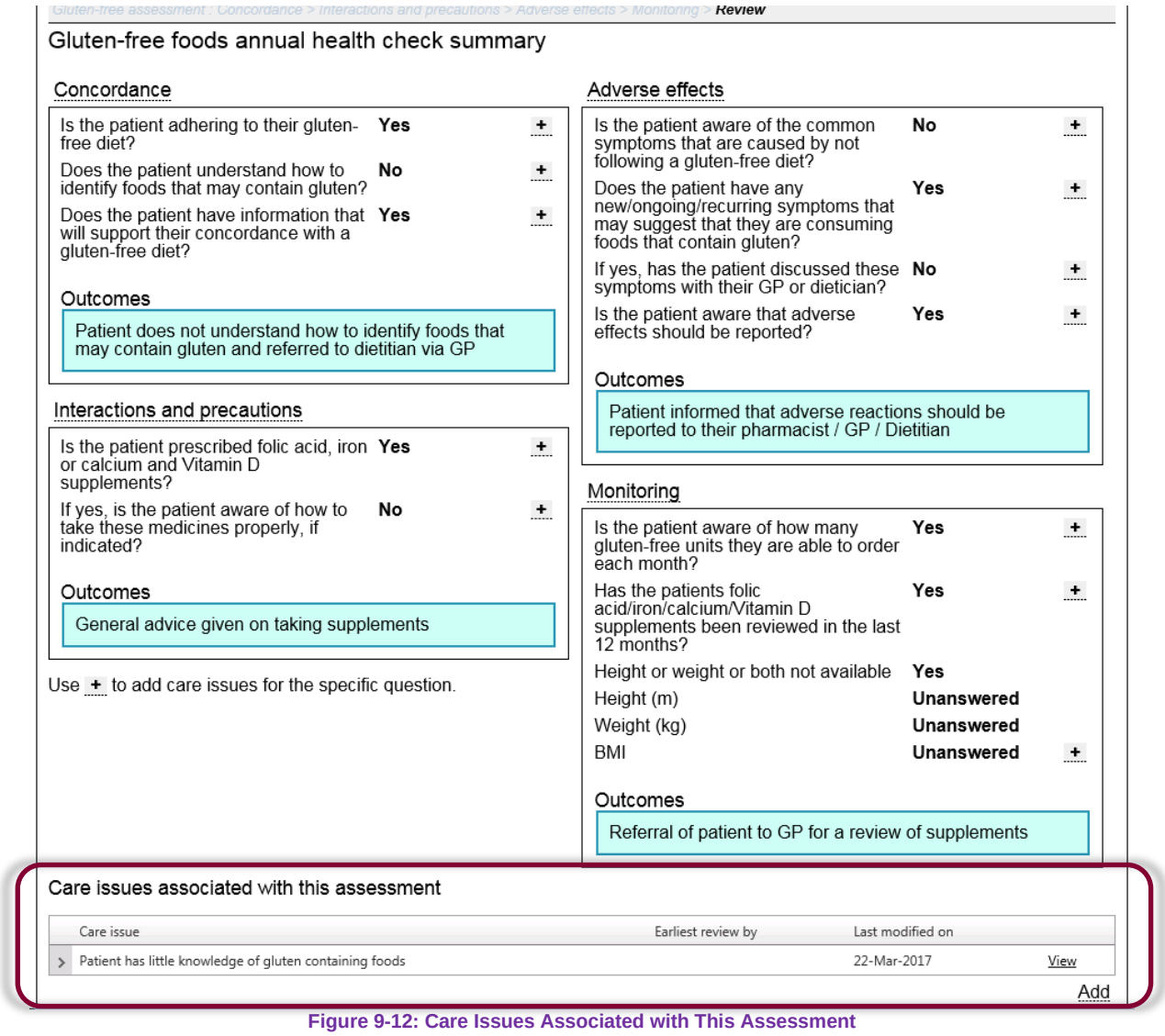


Figure 9-12: Care Issues Associated with This Assessment

9.7 Set the status of a Gluten-free foods annual health check to “Completed”

To “Complete” a Gluten-free foods annual health check:

- From the gluten-free health check summary page, select the “Complete assessment” button in the “Assessment completion” section of the Review screen (Figure 9-13Figure 9-13: Complete Assessment)

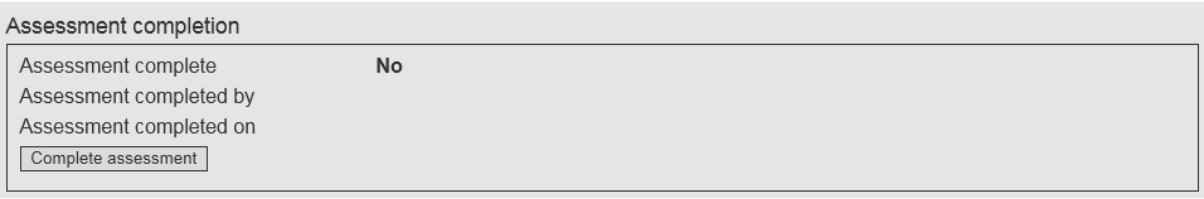


Figure 9-13: Complete Assessment

- The system will display the date of the next gluten-free annual health check. (Figure 9-14). This date will be defaulted to one year from today but can be changed if required.
- Click the Complete button.

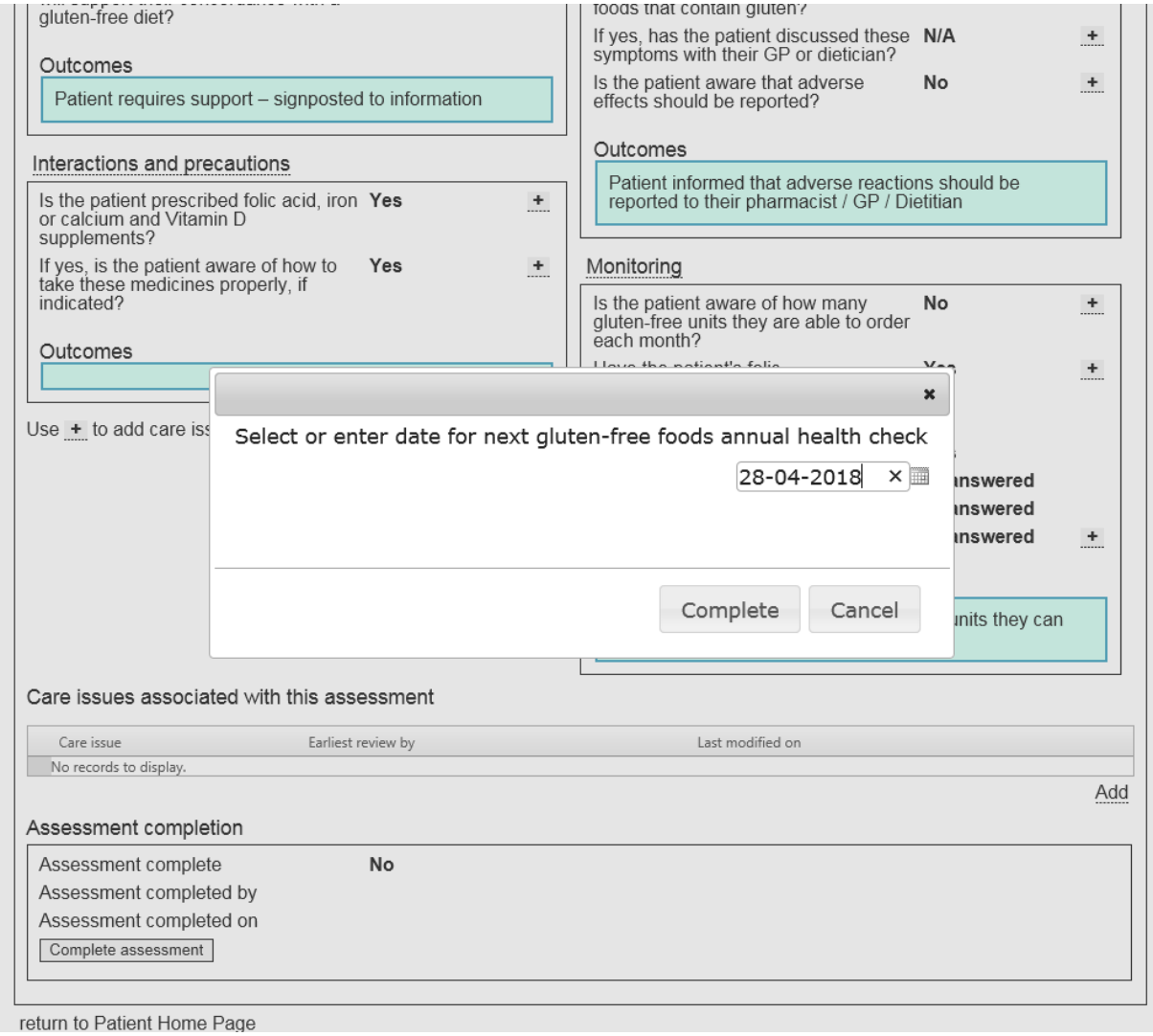


Figure 9-14: Complete Gluten-free foods annual health check (& set date of next one)

Note: The next gluten-free annual health check date can be changed by selecting a new date.

Note: By selecting the "Complete" button (Figure 9-16), this will complete the Gluten-free foods annual health check within PCR. Selecting the "Cancel" button will return the system to the Review page – the Gluten-free foods annual health check will not be completed.

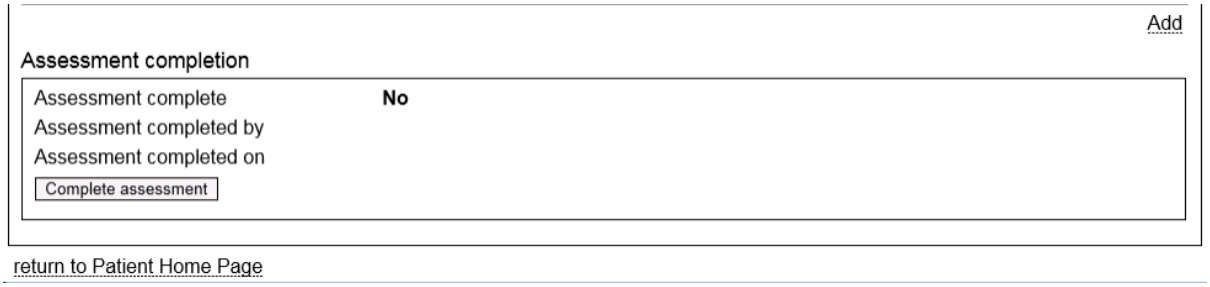


Figure 9-15: Assessment completion details for an "Open" assessment

- The system will set the status of the annual health check to completed and refresh the page (Figure 9-16)
- The assessment completion details will be updated:
    - Assessment complete = Yes
    - Assessment completed by = Pharmacist ID
    - Assessment completed on = date

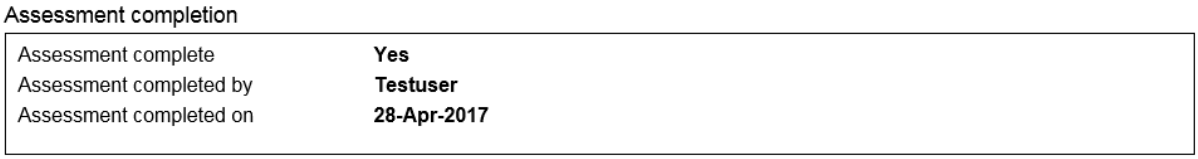


Figure 9-16: Assessment completion details updated when assessment closed

The user can navigate back to the patient home from the link at the bottom of the review page.

9.8 Access existing Gluten-free foods annual health checks from the Patient Home page

"Open "or "Completed" Gluten-free foods annual health checks can be accessed from the "Support tools" tab on the Patient Home page (Figure 9-17)

To edit an "Open" Gluten-free foods annual health check:

- Select the "Review" link for the Gluten-free foods annual health check you want to edit
- The system will navigate to the Gluten-free foods annual health check Review page

To view a "Completed" Gluten-free foods annual health check:

- Select the "Review" link for the Gluten-free foods annual health check you want to View
- The system will navigate to the Gluten-free foods annual health check Review page

To create a new (subsequent) gluten-free foods annual health check follow the same steps used for any previous ones created. As detailed in section 8.2 and 8.3

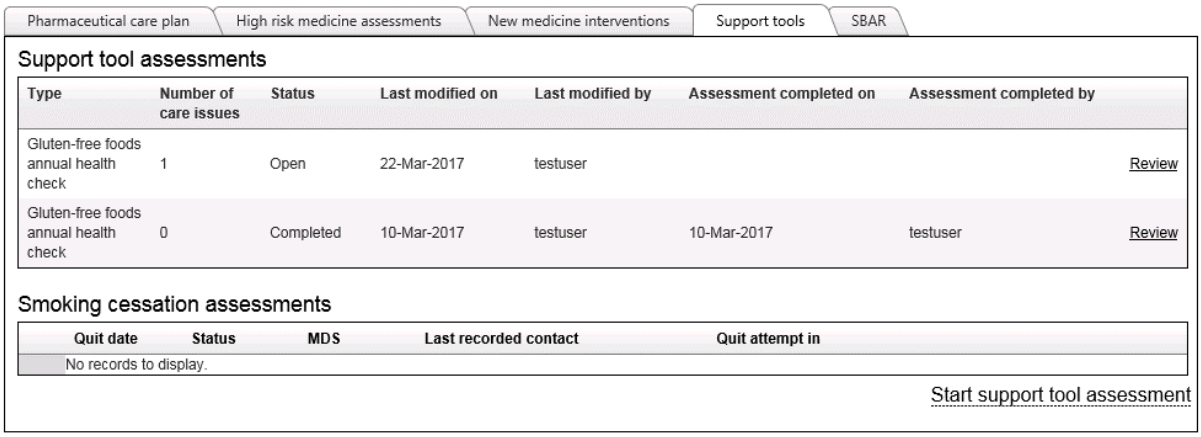


Figure 9-17: Support Tools tab

9.8.1 Example question page for completed assessment (Read only)

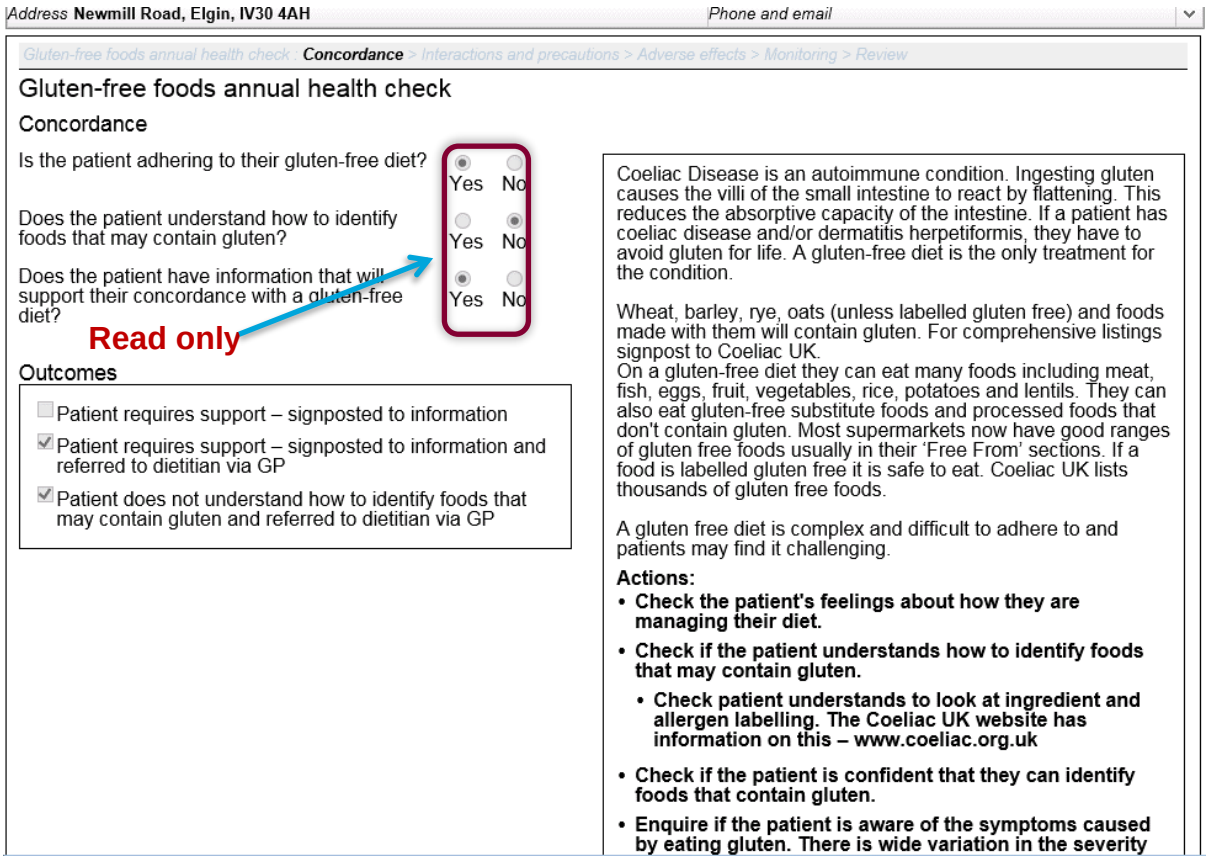


Figure 9-18: Read only – completed assessment

Note: *All data for a completed Gluten-free foods annual health check is shown as read only (Figure 9-18). This means that responses for a completed Gluten-free foods annual health check cannot be edited; however, it is still possible to add a Care Issue / Care Issue Outcome to a completed Gluten-free support tool assessment.*

Note: *The next gluten-free foods annual health check date can be changed in the Patient Profile edit screen.*

10 Smoking Cessation (Support tool)

10.1 Overview

10.1.1 Background

The Scottish Government wish to improve the number of successful quit attempts and to increase the level of responses to minimum dataset questions to the national smoking cessation database. To enable this, the Pharmacy Care Record (PCR) has been updated to provide a consistent electronic solution to support community pharmacies in the recording and management of national smoking cessation quit attempts. Additionally, PCR will support the pharmacy in capturing, validating and electronically submitting the national smoking cessation minimum dataset (MDS).

Smoking cessation is a service currently delivered by community pharmacists in all NHS Scotland health board areas. The service involves engaging with patients who wish to stop smoking by recording information about them, their tobacco use, and previous quit attempts.

The smoking cessation support tool function in PCR provides pharmacists with a function to record information about a patient who wants to stop smoking. Information recorded in PCR aligns with the Smoking Cessation Minimum Dataset and is submitted to the national smoking cessation database at specific intervals in the quit attempt.

Note: MDS is now referred to as Mandatory Progress report in PCR to align terminology.

10.1.2 Overview

The smoking cessation support tool assessment will allow the user to:

- Start a smoking cessation support tool assessment
- Record pre-quit registration information
- Confirm quit date and submit initial mandatory progress report.
- View and maintain pre-quit registration
- View, maintain and submit 4 and 12 week mandatory progress report
- View and record patient progress
- View and record patient contact attempts
- Validate mandatory progress report information prior to submission
- View mandatory progress report submission deadline alerts
- Submit 4 and 12 week mandatory progress report information for external processing
- View smoking cessation reports

10.1.3 Key information

- A unique reference is created for each quit attempt when the quit date is confirmed.
- The mandatory progress report submission deadlines are calculated in number of weeks from the quit date
- It is not possible to submit a twelve week mandatory progress report if the quit attempt failed at the four week follow up or the four week follow up was not completed.

- An open quit attempt will auto-closed by the system when either of the below two conditions are met
    - The quit attempt is identified as open even after 20weeks from quit attempt date.
    - Where a quit attempt date is not available from an attempt, the quit attempt is identified as open even after 20weeks from when the attempt was last modified.

10.2 Start Smoking Cessation Support Tool Assessment

To start a Smoking Cessation Support Assessment:

Log into PCR and identify the patient that you want to create the assessment for. You may need to create a new patient.

Select the support tools tab (on the patient home page) and click the “Start support tool assessment” link. The support tool assessment options page is displayed, Figure 10-1.

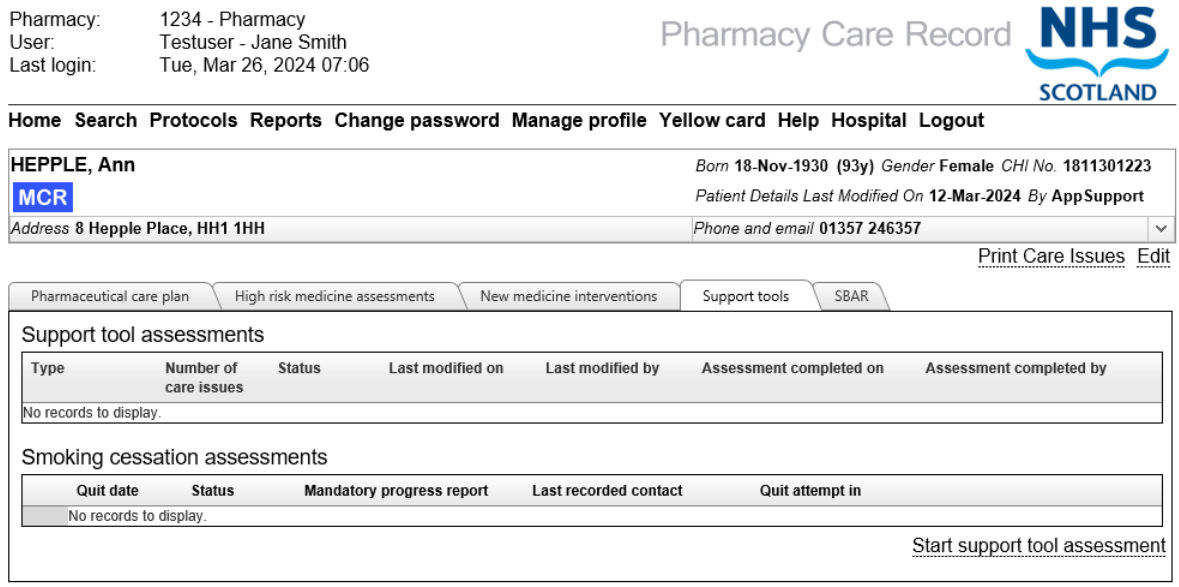


Figure 10-1: Start support tool assessment

- Select “Smoking Cessation” from the dropdown menu marked “Please select the support tool”, Figure 10-2.

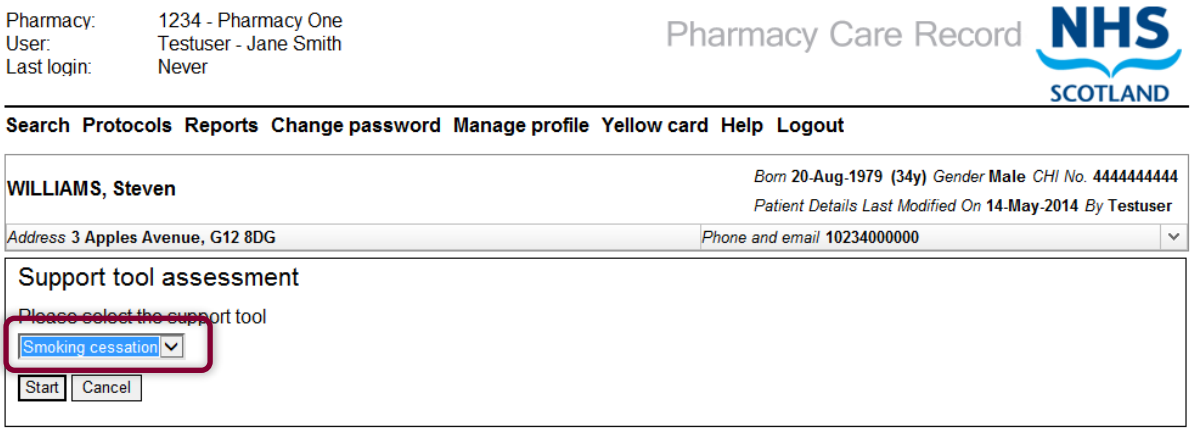


Figure 10-2: Please select the support tool

- Click “Start”. The system will display the “Pre-Quit registration” page, Figure 10-5.

“Start” creates a new assessment in PCR for the patient.

“Cancel” returns to the patient home page. No details are saved.

Note: Previously PCR did not allow creation of new smoking cessation quit attempts for a patient when a previous attempt for the same patient was still open in the system. This has now been changed. PCR will support creation of new smoking cessation quit attempts for a patient while previous such attempts for the patient are still open in the system. All such attempts are listed in the patient home page (support tools tab). Care must be taken to ensure that the correct quit attempt is chosen for any action that needed to be taken for a quit attempt.

10.3 Pre-Quit Registration

The Pre-Quit Registration page allows the user to enter or select the following information:

- Consent
- Client Information
- Tobacco use and quit attempts
- Pharmaceutical usage
- Referral and intervention context
- Observation on any medication used by patient and possible interactions with smoking of tobacco
- Additional observations or notes about the quit attempt

Information entered or selected on the Pre-Quit Registration page can be saved even if some items are incomplete or missing. However, they all need to be completed before the quit date is set.

To record Pre-Quit Registration:

- Select, or where applicable enter text, for all sections of the Pre-Quit Registration – or as much as is known.
- Click save, the Review Page is displayed, Figure 10-7.

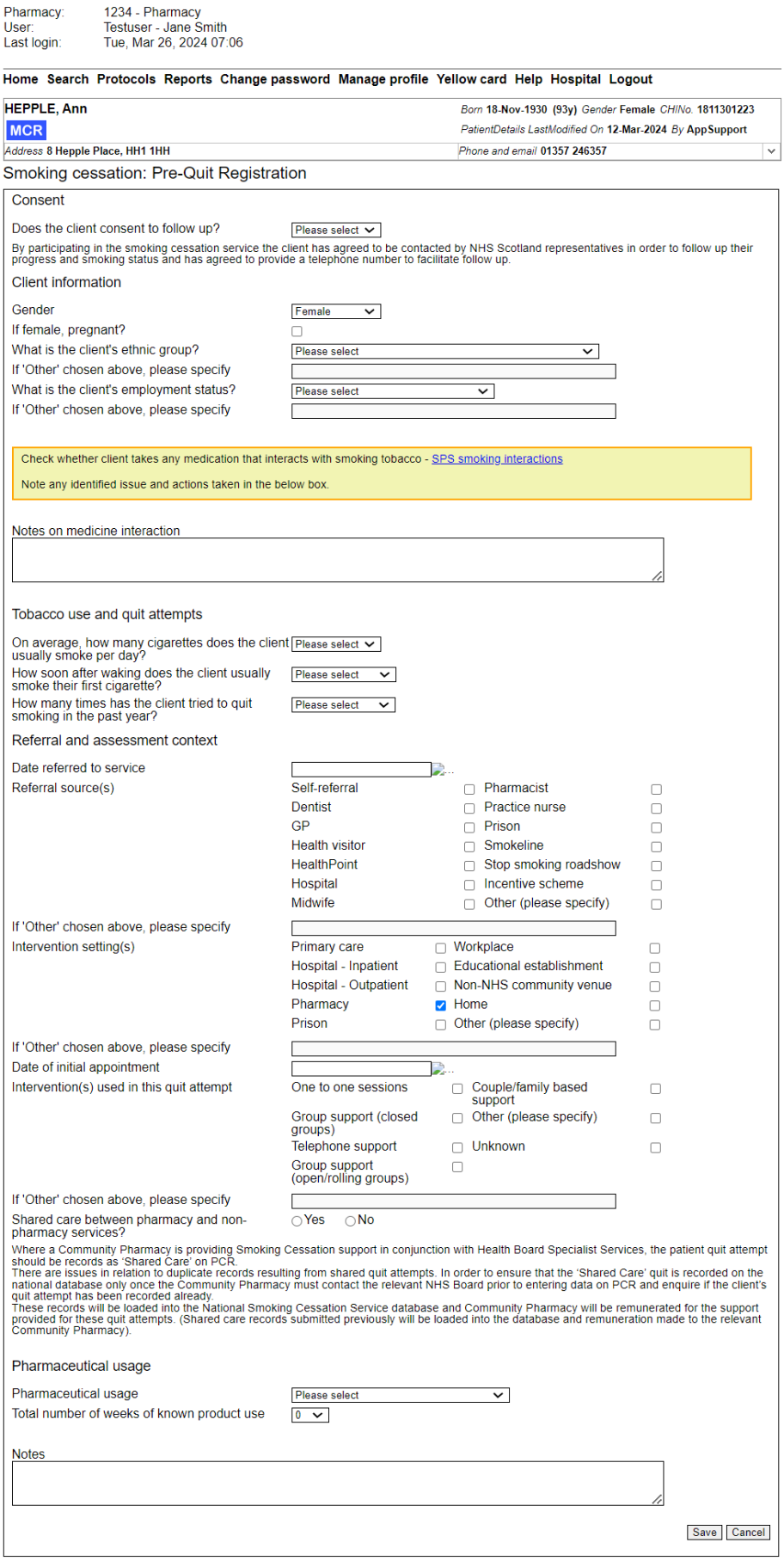
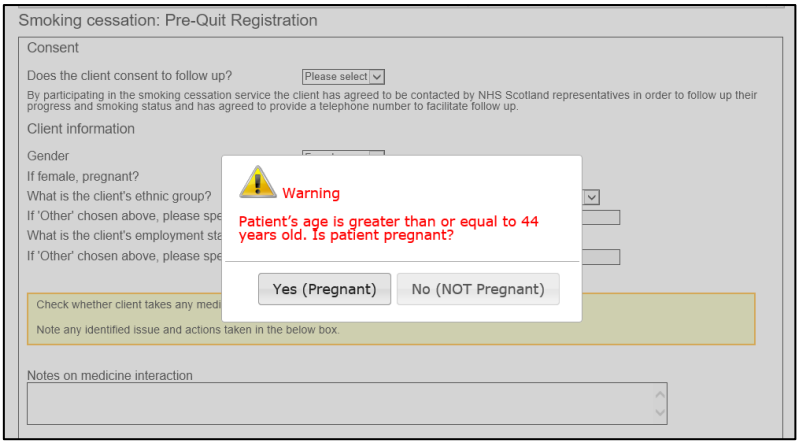


Figure 10-3: Smoking Cessation Pre-Quit Registration

If a patient who is 44 years old or more is identified as being pregnant a warning message will be displayed. The message will clear on selection of either the 'Yes (Pregnant)' or 'No (Not Pregnant)' button



Age greater that 44 pregnancy message

If a selected option for "Pharmaceutical usage" includes Varenicline, additional guidance is displayed and questions must be answered to confirm if the Varenicline assessment indicates that the patients GP should be contacted and to confirm that the GP must be contacted before the patient begins on Varenicline, Figure 10-6.
For Smoking Cessation assessment initiated on or after 9th April 2024, the additional Varenicline questions that are displayed will be different (see Figure 10-6-1).

This additional information is not included in the Mandatory Progress report submissions.

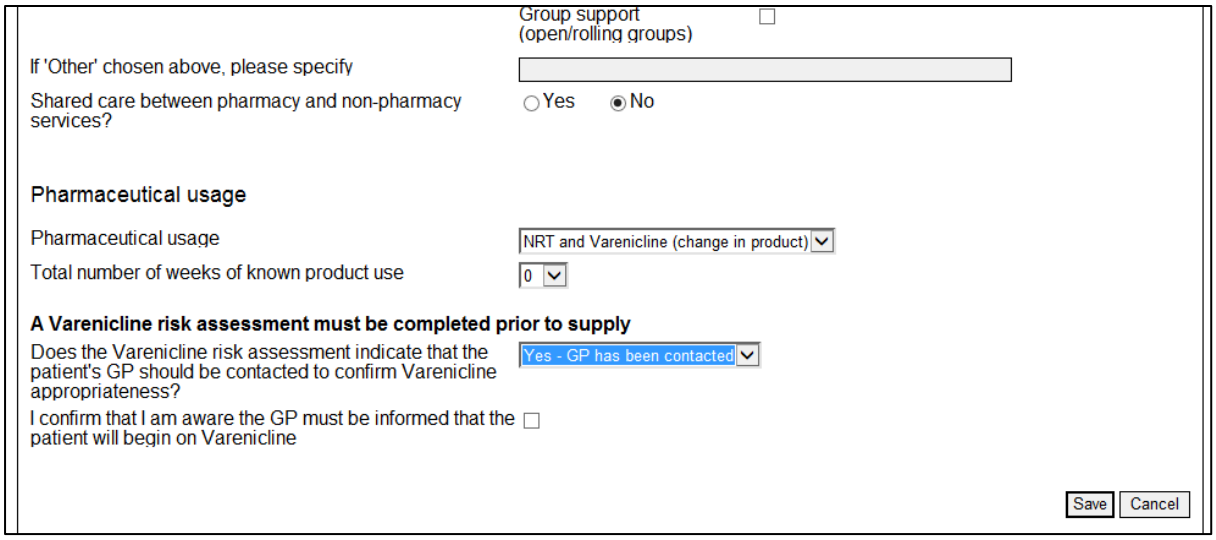


Figure 10-4: Pharmaceutical usage includes Varenicline

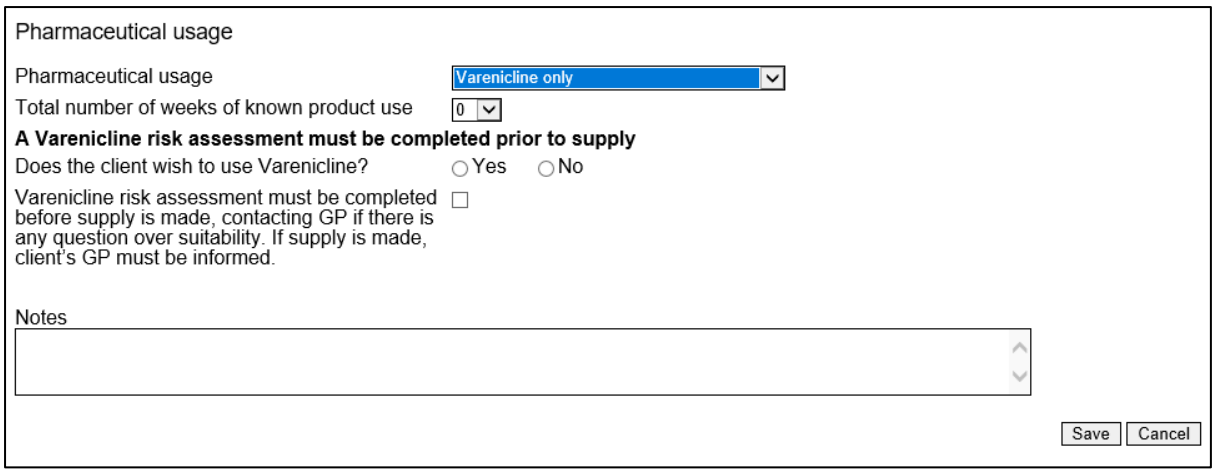


Figure 10-6-1: New Varenicline questions

NOTE: Where a Community Pharmacy is providing Smoking Cessation support in conjunction with Health Board Specialist Services, the patient quit attempt must be recorded as 'shared care'. This is done by selecting "Yes" for the "shared care between pharmacy and non-pharmacy service?" radio button on the pre-quit registration page.

There are known issues in relation to duplicate records resulting from shared quit attempts. To ensure that the "shared care" quit attempt is recorded only once on the national database, the Community Pharmacy must contact the relevant Health Board before data is entered on PCR and verify if the patient's quit attempt has already been recorded. These records will be loaded into the National Smoking Cessation Service database and Community Pharmacies will be remunerated for supporting these quit attempts.

(Note: Shared care records submitted previously will be loaded into the database and remuneration made to the relevant Community Pharmacy).

10.4 Review assessment details (after Pre-Quit registration)

The review page is displayed after the pre-quit registration is saved.

All further steps in the process (confirm quit date, record patient's progress, record contact attempt, submit 4 week mandatory progress report, submit 12 week mandatory progress report etc.) are initiated from links on the review page.

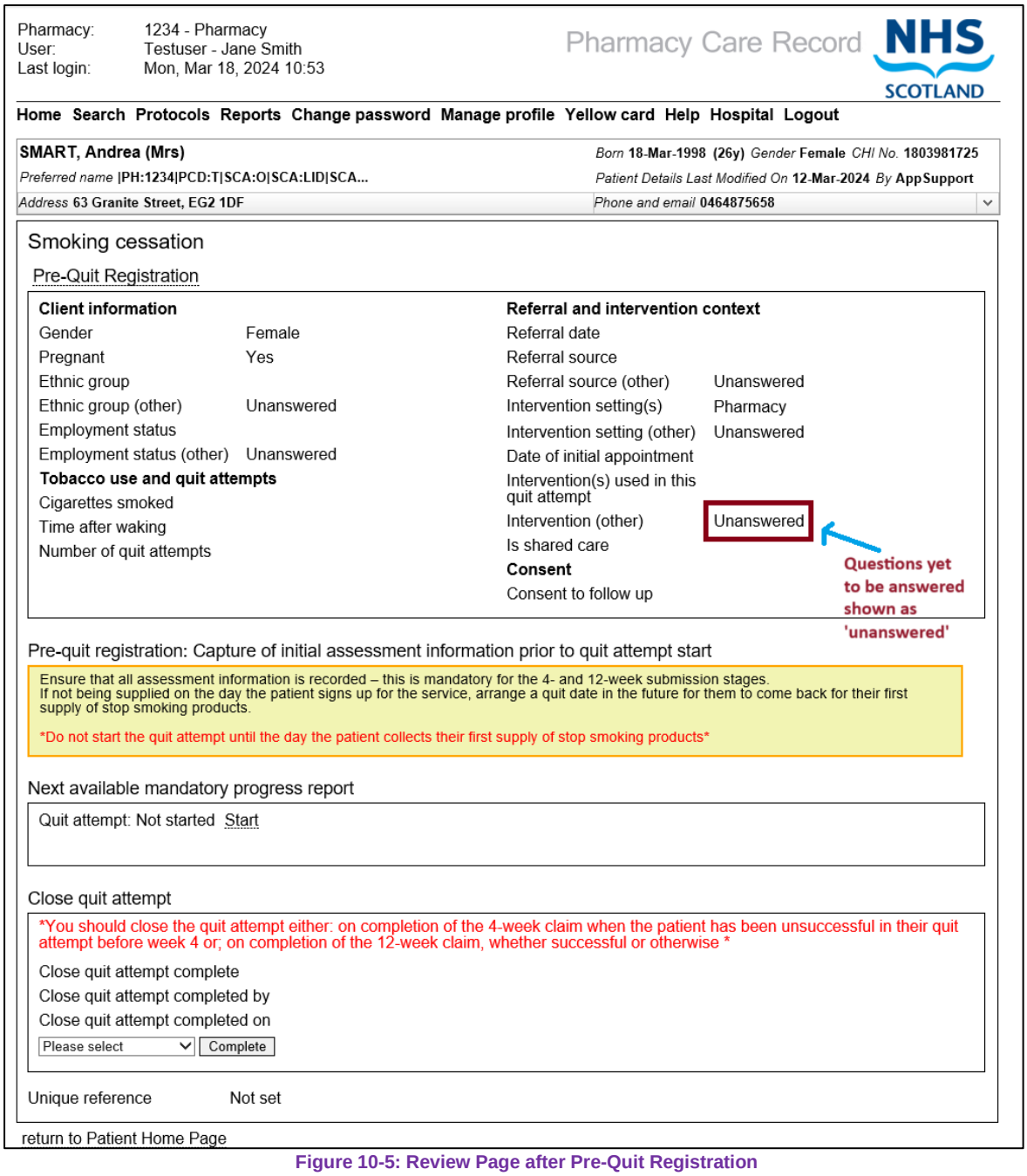


Figure 10-5: Review Page after Pre-Quit Registration

Below is a summary of the review page sections with information on their current state.

Pre-Quit Registration

A summary of the information recorded in the pre-quit registration is displayed on the review page. If no information was provided for a specific question this is shown as “Unanswered”

A yellow box with some guidance text and warning text is displayed on the Smoking cessation review page when the quit date is not yet set. This box will not appear once the quit date has been set for the attempt.

Next available mandatory progress report

The options in this section vary depending on the state of the assessment. After the pre-quit registration this will show an option to “Start Quit Attempt”. (As the assessment progresses, this section will display options to submit the 4 and 12 week mandatory progress reports.).

Close quit attempt

Function to complete an assessment in PCR. This is independent of the mandatory progress report submission process. More details of this function are provided in section 10.15.

10.5 Start Quit Attempt and Confirm Quit Date

Starting a quit attempt will create a new quit attempt record that will have a unique identifier.

Having set the quit date, the four week and target dates for the four week and twelve week mandatory progress report submissions are calculated.

To start a quit attempt and confirm quit date

- Select “Start” form the “Next available mandatory progress report” section, Figure 10-8. The “Confirm quit date and record patient’s progress” page is displayed, Figure 10-9.

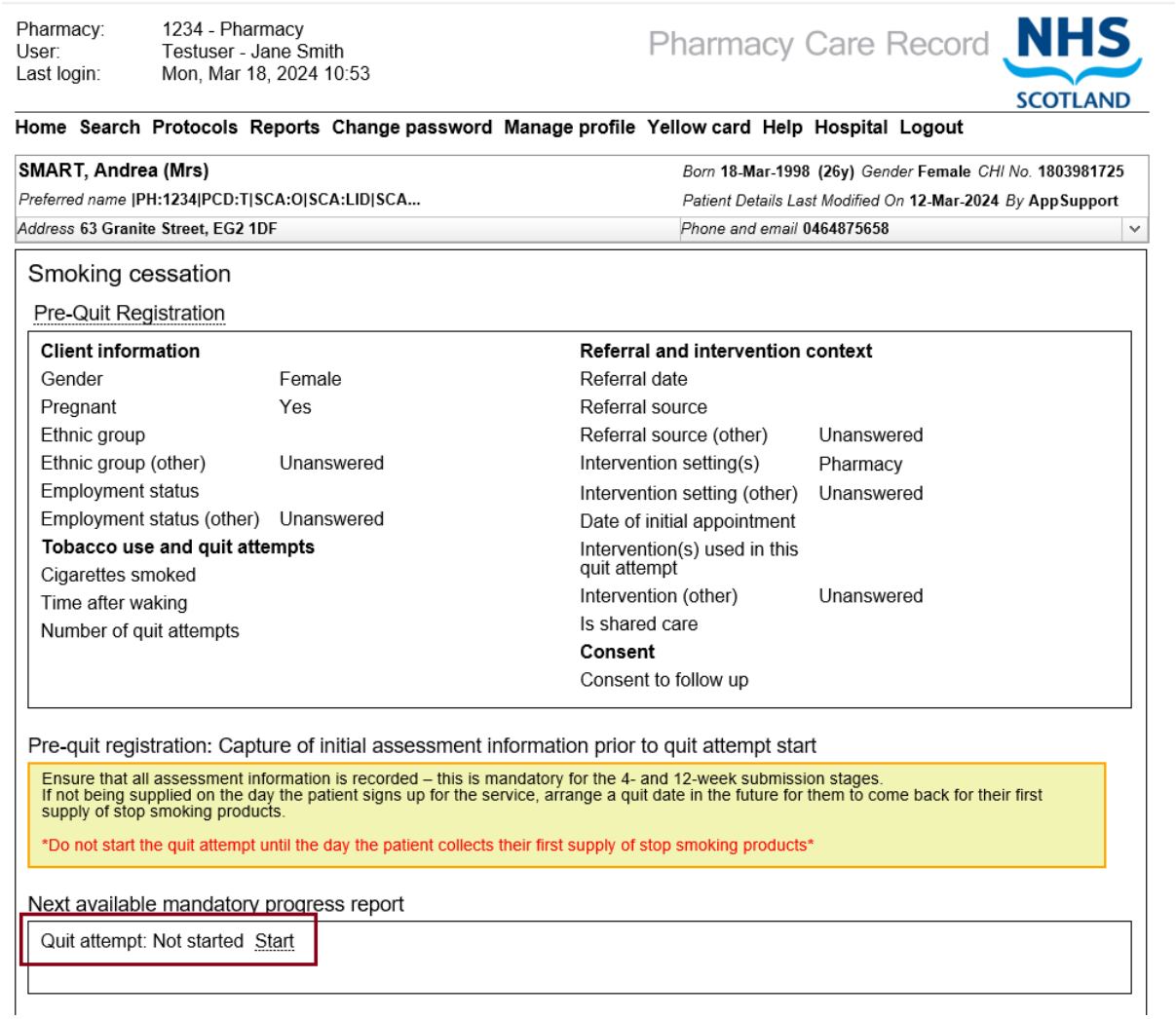


Figure 10-6 Start quit attempt

10.6 Confirm quit date and record patient's progress

By default, the "Record patient's progress" checkbox is selected. This allows you to record a "progress entry" at the same time as setting the quit date. If you do not want to record a progress entry, then deselect this checkbox.

To Confirm quit date (with option to record patient's progress):

- Enter the quit date you have agreed with the patient in the "confirm quit date and record patient's progress" section.
- Complete progress entry details (date, contact type, has the patient smoked, CO reading, product, product and contact notes)
- Pharmaceutical usage data entered during pre-quit registration is displayed with option to navigate to pre-quit registration page to edit the values.
- Click the confirm quit date button, the review page is displayed

When confirm quit date is selected, any missing information is highlighted in red text: "Required".

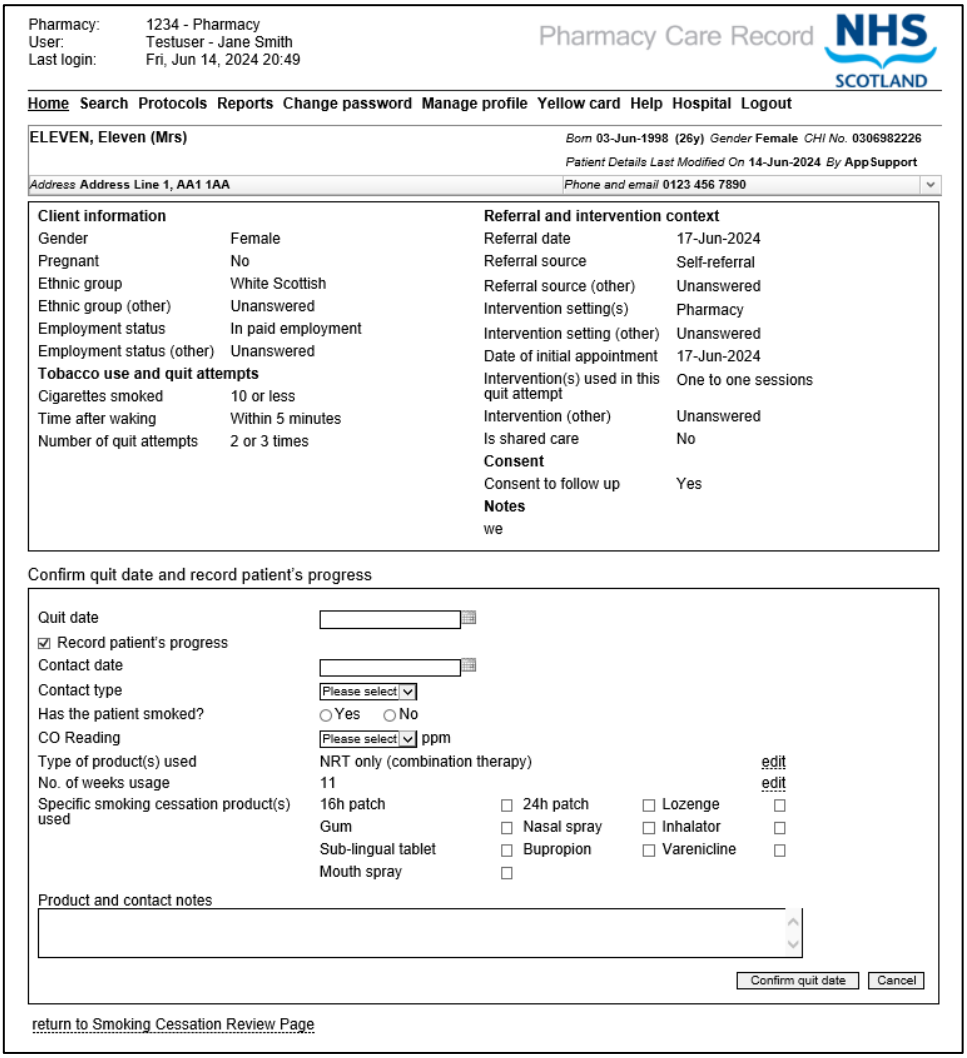


Figure 10-7: Confirm quit date (with option to record patient progress)

To confirm quit date (without Recording a progress entry):

- Enter quit date in the “confirm quit date and record patient’s progress” section
- Deselect “Record patient’s progress” checkbox
- Click the confirm quit date button, the review page is displayed

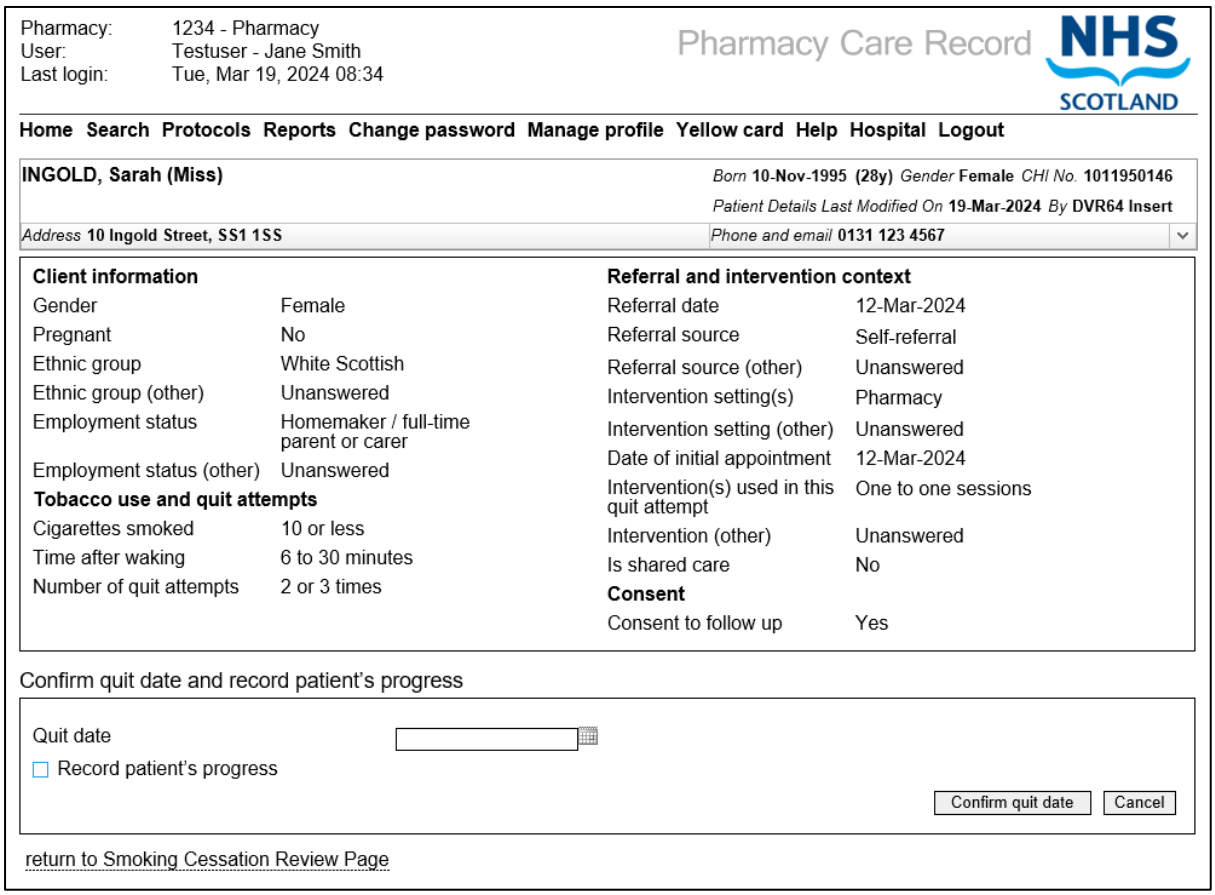


Figure 10-8: Confirm quit date (Without recording patient’s progress)

If any of the pre-quit registration information is invalid/missing, a section named “Please correct the following validation errors before attempting to proceed” is displayed in place of the “confirm quit date and record patient’s progress” section.

The missing or invalid information is highlighted in red text, Figure 10-11.

- The “Edit Pre-Quit Registration” link allows the patient to update any missing information from the Pre-Quit Registration.
- The “Edit Patient” link allows the user to edit address, telephone and postcode information held in the patient profile. This information is also submitted as part of the mandatory progress report.

Once all missing or invalid information is corrected the “confirm quit date and record patient’s progress” section is displayed.

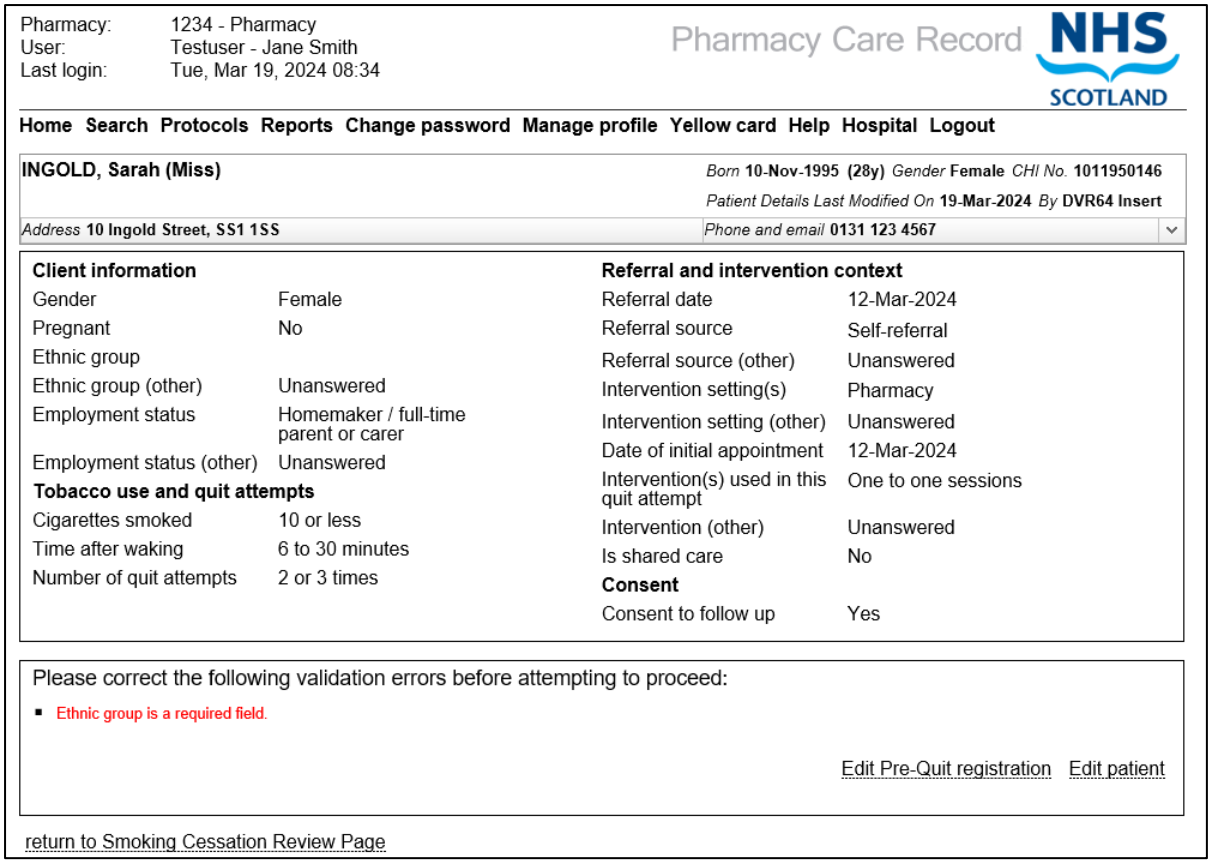


Figure 10-9: Validation errors shown in red text

10.7 Review Assessment Details (Quit Date Confirmed)

The review page is displayed once the quit date is confirmed, Figure 10-12.

Quit date confirmed

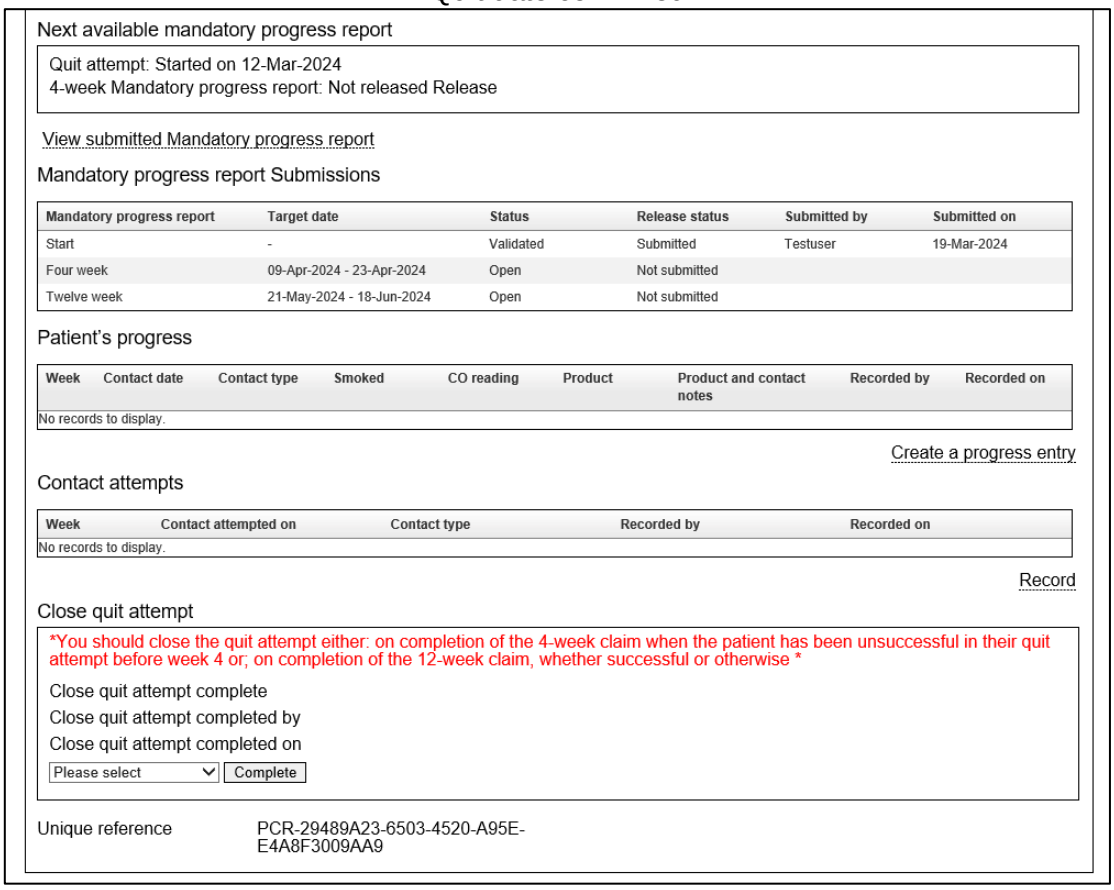


Figure 10-10: Review Page after quit date is confirmed

Below is a summary of the information shown on the review page after the quit date is confirmed:

Pre-Quit Registration (Summary)
A summary of the pre-quit registration.

Next available mandatory progress report
This section displays the Quit date and also shows the link to “Release” the 4 week Mandatory progress report. The link is disabled until it is between 4-6 weeks from the quit date. (This will also show the link to “Release” the 12 week Mandatory progress report when the current date is within the target date submission window)

View Submitted Mandatory progress report link
Select this link to view all submitted Mandatory progress report data.

Mandatory progress report Submissions
A summary of the status of the Start, 4 week and 12 week Mandatory progress report.

Patient’s progress

A summary of any patient progress entries that have been created for the quit attempt.

Contact Attempts
A summary of any contact attempts that have been created.

Care Issues associated with this assessment
A summary of any associated care issues that have been created.

Note: Starting 9th April 2024, a new care issue cannot be created for Smoking cessation quit attempts. Existing care issues will still be displayed in this section.

Close quit attempt
Option to close a quit attempt. When complete, completion date and reason are shown.

Unique Reference
Unique reference for quit attempt**.**

10.8 Submit 4 Week Data

The 4 week Mandatory progress report can be submitted (to the national smoking cessation database) between 4 and 6 weeks (28-42 days) after the quit date.

> *For example, where the quit date is set at 3pm on 1st May 2014, the first date that the 4 week submission can be is 4 weeks (28 days) later on the 29th May 2014 (at any time that day) The last time the submission can be made is up until midnight on the 12th June 2014.*

It is not possible to submit the data if this 4-6 week submission window is missed. This submission includes all information recorded in the pre-quit registration together with additional information shown below.

To submit 4 week data:

- Select 'release' 4 week Mandatory progress report link from the 'next available mandatory progress report' section of the review page.
- Enter required information
- Click submit 4 week data button

There is a link to update the pre-quit registration details if any have changed. For example, "Pharmaceutical usage weeks".

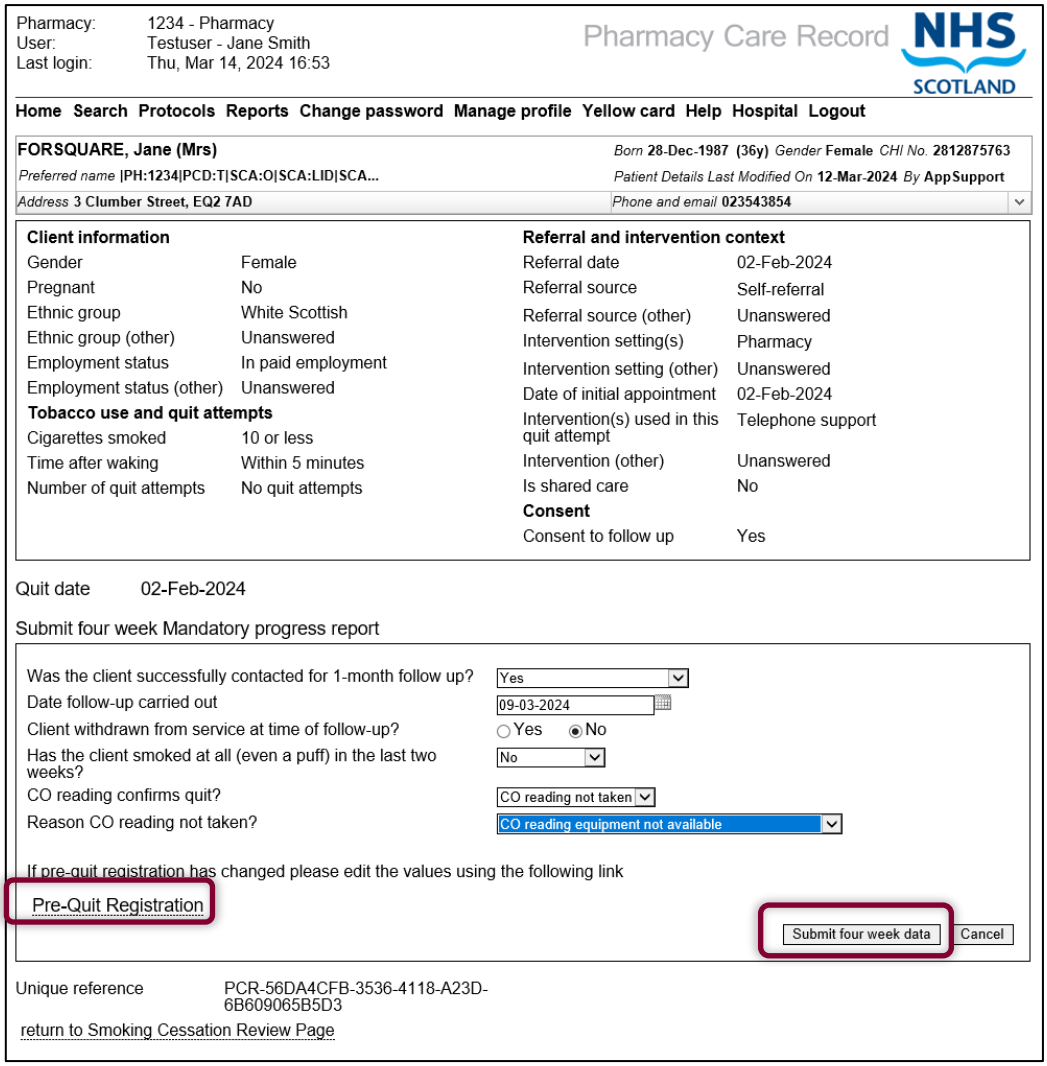


Figure 10-11: Submit 4 week data

Before the 4 week mandatory progress report information can be submitted, any missing or invalid data is highlighted, Figure 10-14.

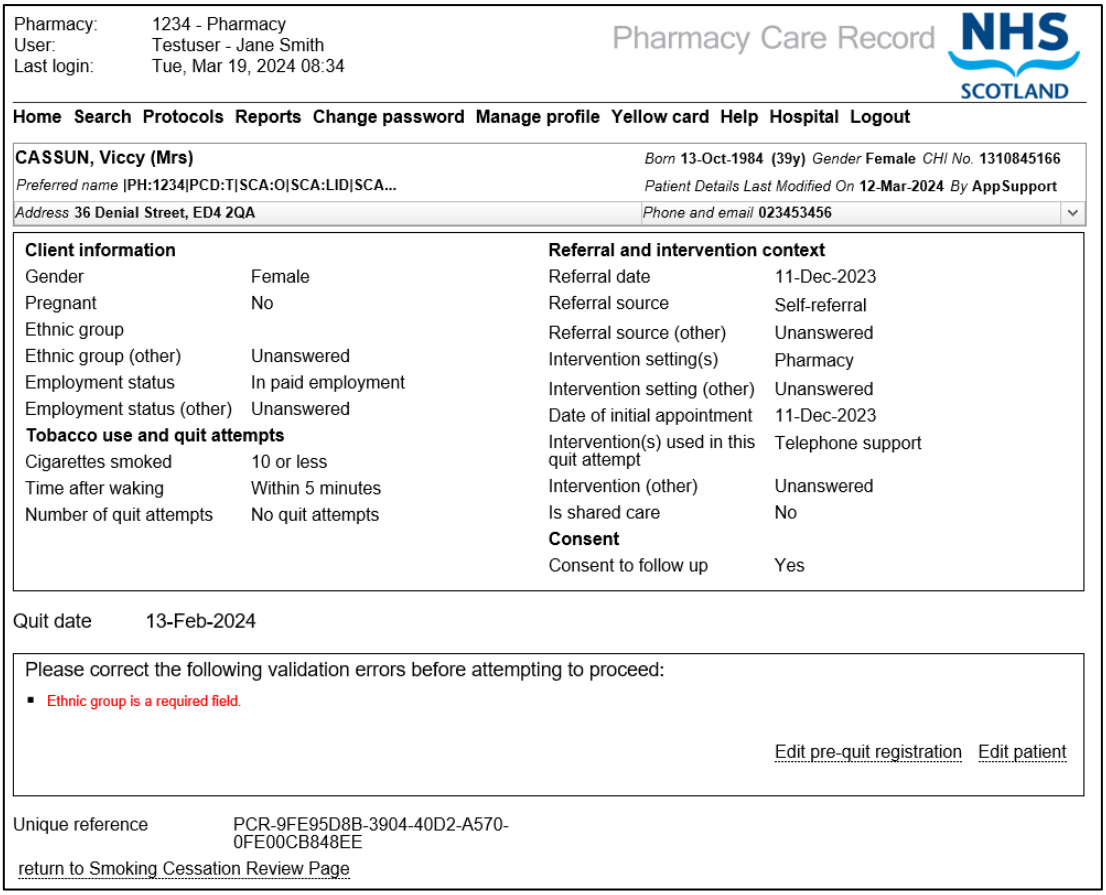


Figure 10-12: Submit 4 week data validation error shown

If it is recorded that the client was not successfully contacted at the 4 week (1 month) follow up, or had smoked it will not be possible to progress to the 12 week submission.

10.9 Review Assessment Details (4 Week Data Submitted)

Now that the 4 week Mandatory progress report has been submitted, the mandatory progress report submissions section shows the overall Mandatory progress report status as “Validated” with the release status shown as “Submitted”, Figure 10-15.

The assessment must be accessed and updated with any progress entries or contact attempts that occur in the weeks leading up to the 12 week submission.

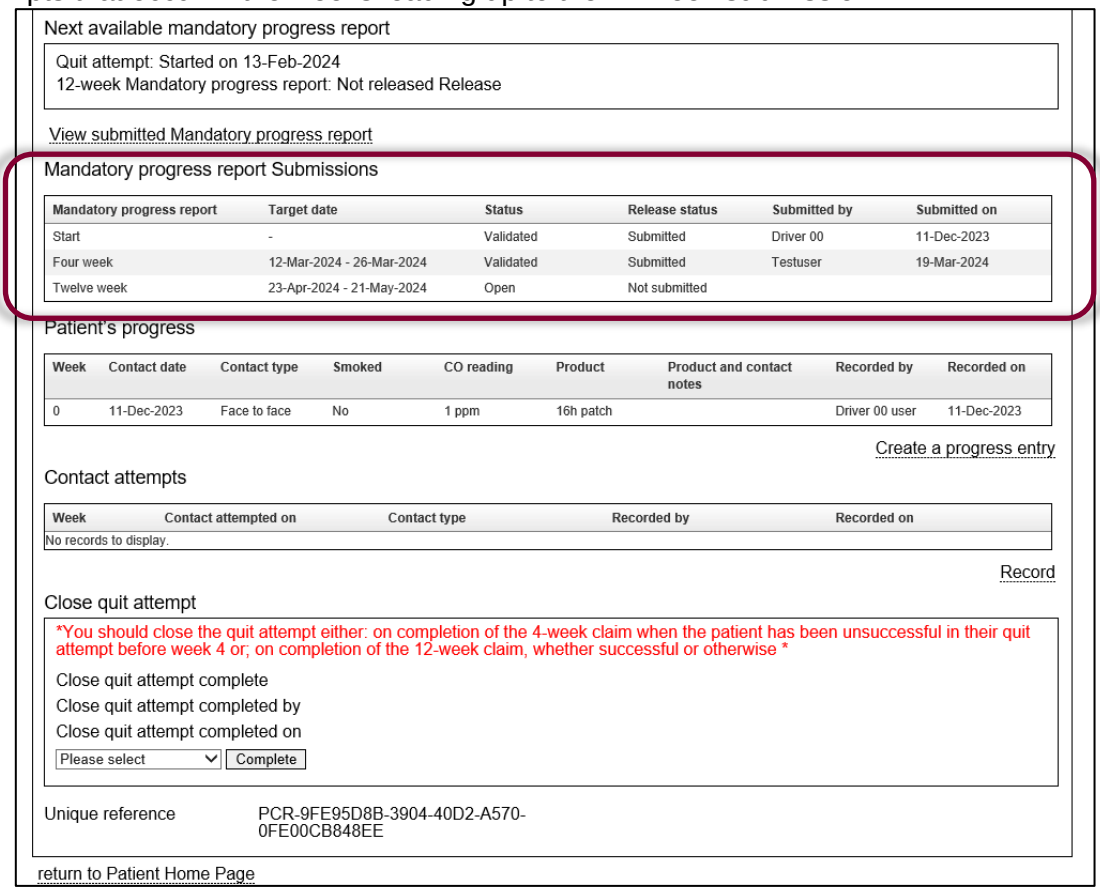


Figure 10-13: 4 week data submitted

The next action in the next available mandatory progress report is shown as “Release” 12 week Mandatory progress report. This link is not enabled until the 12 week submission window is reached (10-14 weeks from quit date).

10.10 Submit 12 Week Data

The 12 week Mandatory progress report can be submitted by the pharmacy (to the national smoking cessation database) between 10 and 14 weeks (70- 98 days) after the quit date.

> *For example, where the quit date is set at 3pm on 1st May 2014, the first date that the 12 week submission can be is 10 weeks (70 days) later on the 10th July 2014 (at any time that day) The last time the submission can be made is up until midnight on the 07th August 2014.*

It is not possible to submit the data if the 10-14 week submission window is missed. Additionally, it is not possible to submit if the client was not successfully contacted at the 4 week (1 month) follow up, or had been known to have smoked at the 4 week follow up. This includes all information recorded in the pre-quit registration together with additional information shown below.

To submit the 12 week data:

- Select “Release” 12 week Mandatory progress report link from the ‘next available mandatory progress report’ section of the review page.
- Enter required information
- Click submit 12 week data button, the review page is displayed.

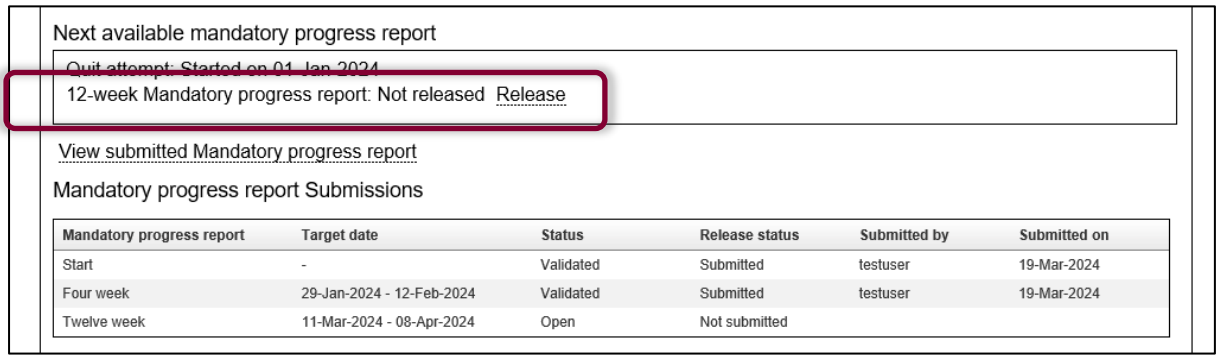


Figure: Submit 12 week data release link.

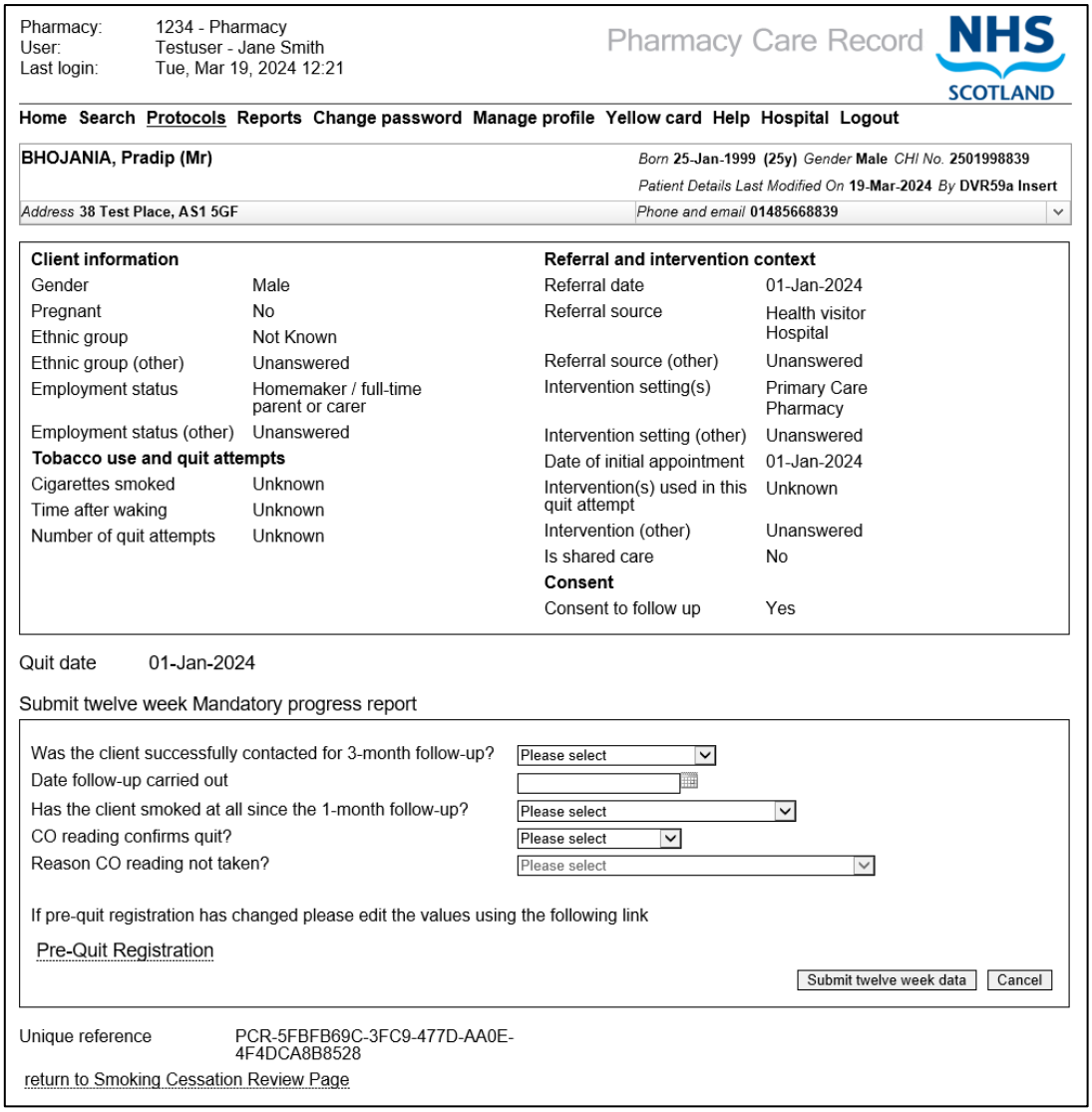


Figure 10-14: Submit 12 week data.

("Reason CO reading not taken" is disabled unless "CO reading not taken" selected in "CO reading confirms quit".)

10.11 Review Assessment Details (12 Week data submitted)

Now that the 12 week Mandatory progress report has been submitted, the mandatory progress report submissions section is complete for all mandatory progress report submissions; it shows the overall mandatory progress report status for Start, four week and twelve week as "Validated" with the release status for each shown as "Submitted", Figure 10-17.

Any progress entries or Contact attempts that were made in the weeks leading up to the 12 week submission are also shown on the review page.

The "Next available mandatory progress report" section is no longer displayed on the page.

Mandatory progress report Submissions

Mandatory progress report	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	testuser	19-Mar-2024
Four week	29-Jan-2024 - 12-Feb-2024	Validated	Submitted	testuser	19-Mar-2024
Twelve week	11-Mar-2024 - 08-Apr-2024	Validated	Submitted	Testuser	20-Mar-2024

Figure 10-15: 12 week data submitted

10.12Patient's Progress

The patient is encouraged to keep in contact with the pharmacy weekly. A progress entry can be recorded at any time during the quit attempt.

To record a progress entry:

- Select the "Create a progress entry" link at the bottom right hand side of the "Patient's progress" on the review page
- Enter required information
- Pharmaceutical usage data entered during pre-quit registration is displayed with option to navigate to pre-quit registration page to edit the values.
- Click "Create a progress entry", details are saved the review page is displayed.

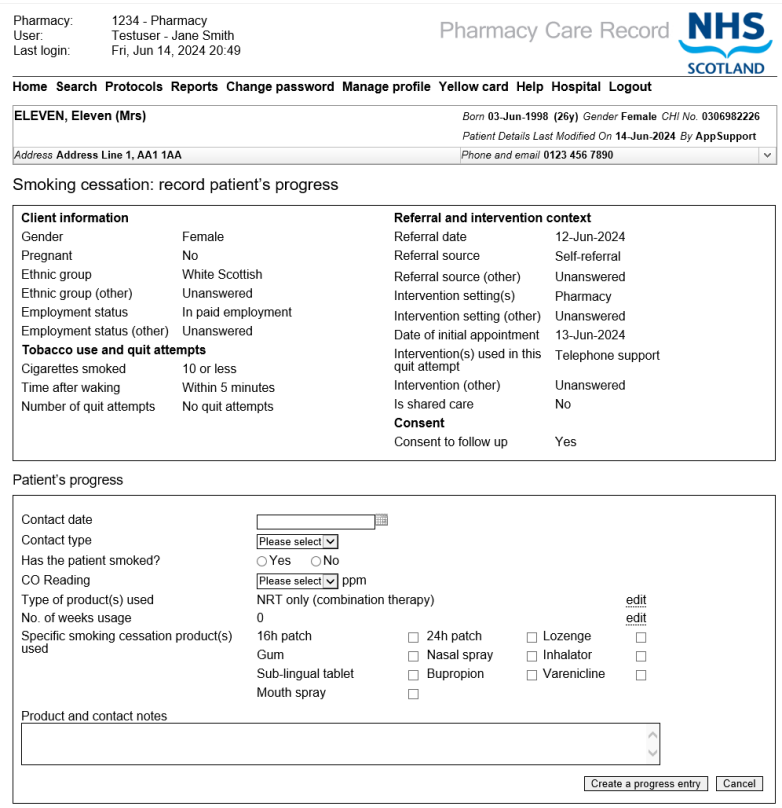


Figure 10-16: Record a progress entry

10.13Record Contact Attempt

A pharmacy is required to make several contact attempts if necessary in order to achieve a successful follow up contact at 4 and 12 weeks. PCR provides a simple function to log contacts attempts that the pharmacy makes.

To record a contact attempt:

- Select “Record” link under the contact attempts summary on the review page.
- Enter contact attempt date and contact type
- Click record contact attempt button, details are saved and the review page is displayed.

Figure 10-17: record contact attempt

10.14 Support tools overview

The support tools tab shows a summary of Smoking Cessation Support Tool Assessments.

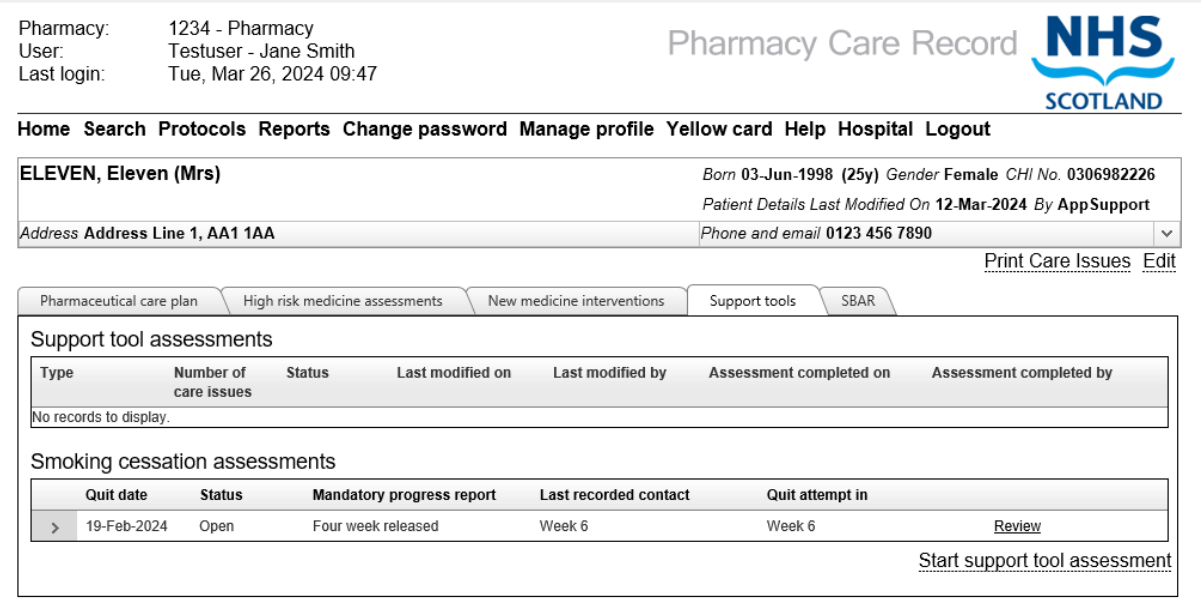


Figure 10-18: Support tools overview

10.15Smoking Cessation Assessment Completion

An assessment can be completed at any time at the discretion of the pharmacist. The assessment completion status is independent of the status of the smoking cessation mandatory progress report submissions. This is necessary because some board areas have enhanced smoking cessation services that go beyond the 12 week Mandatory progress report submission and Pharmacies may wish to keep an assessment record open beyond the 12 week mandatory progress report and to continue recording patient progress.

Valid PCR completion statuses are:

- Successful
- Unsuccessful
- Lost to follow up
- Patient died

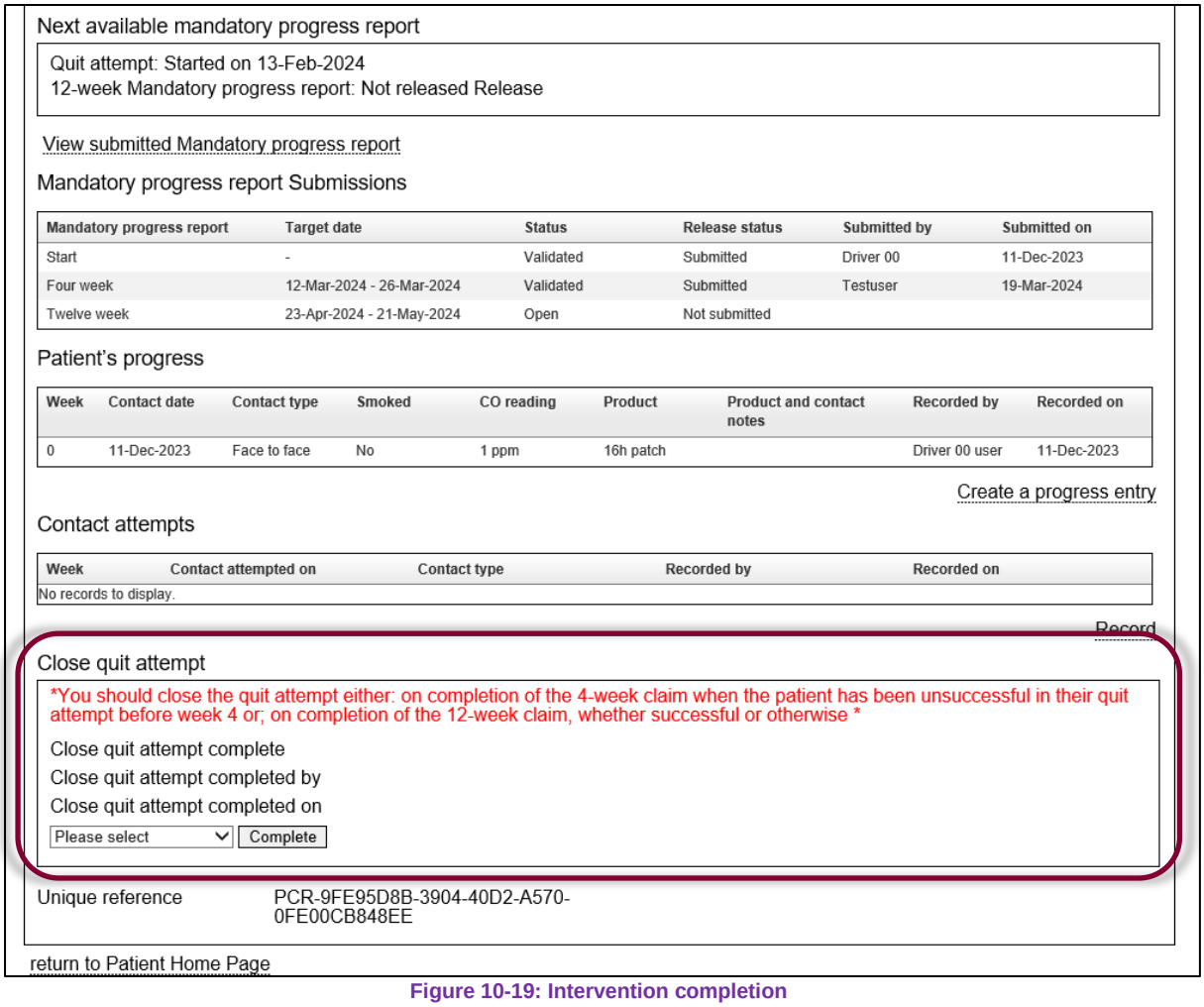


Figure 10-19: Intervention completion

Note: An open quit attempt will auto-closed by the system when either of the below two conditions are met

The quit attempt is identified as open even after 20weeks from quit attempt date. Or,

Where a quit attempt date is not available from an attempt, the quit attempt is identified as open even after 20weeks from when the attempt was last modified.

Note: Once set to complete, mandatory progress report information will be read only.

To complete a smoking cessation quit attempt:

- From the 'Close quit attempt' section on the smoking cessation review page select the "complete" button
- The "Confirm Completion message is displayed, Figure 10-22.
- Select "Yes" to complete intervention or "No" to cancel

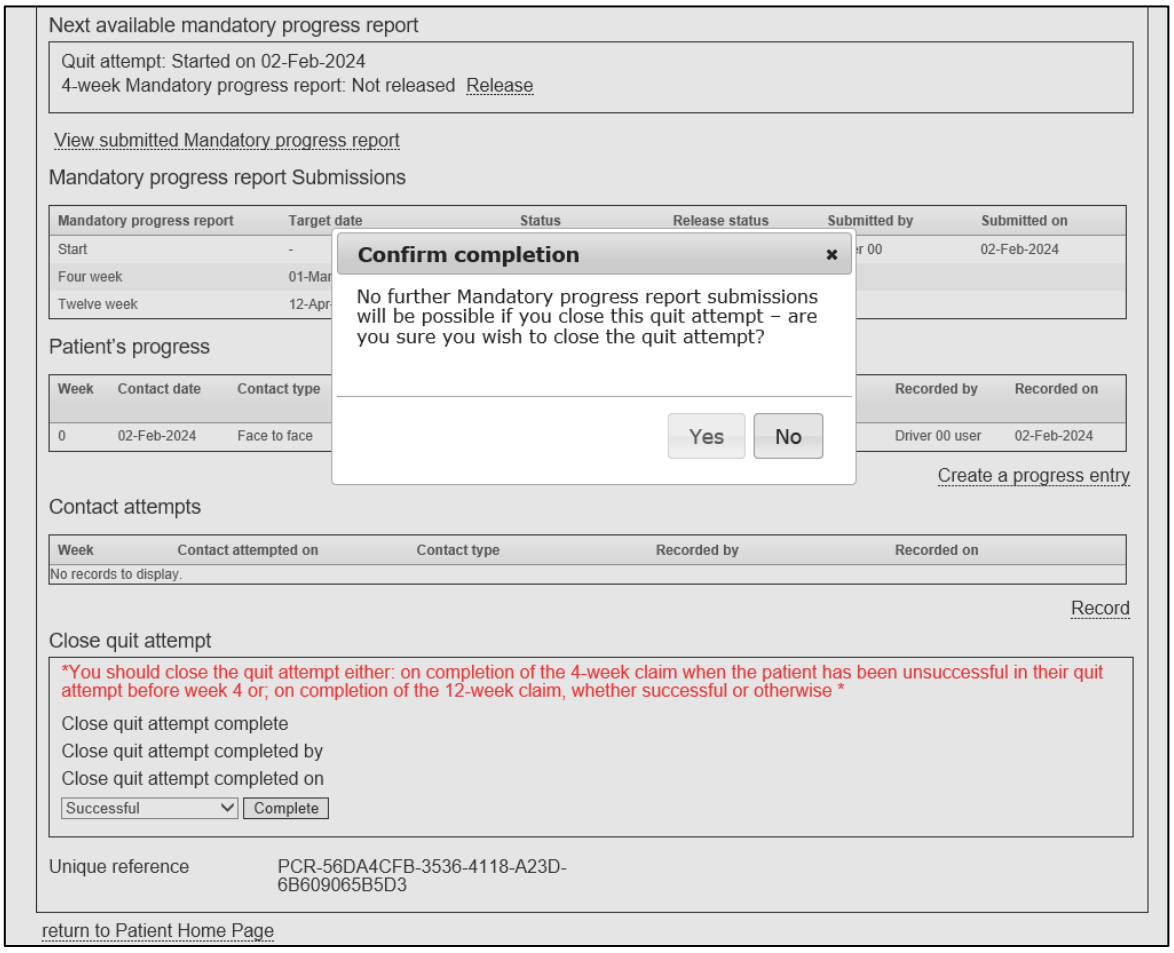
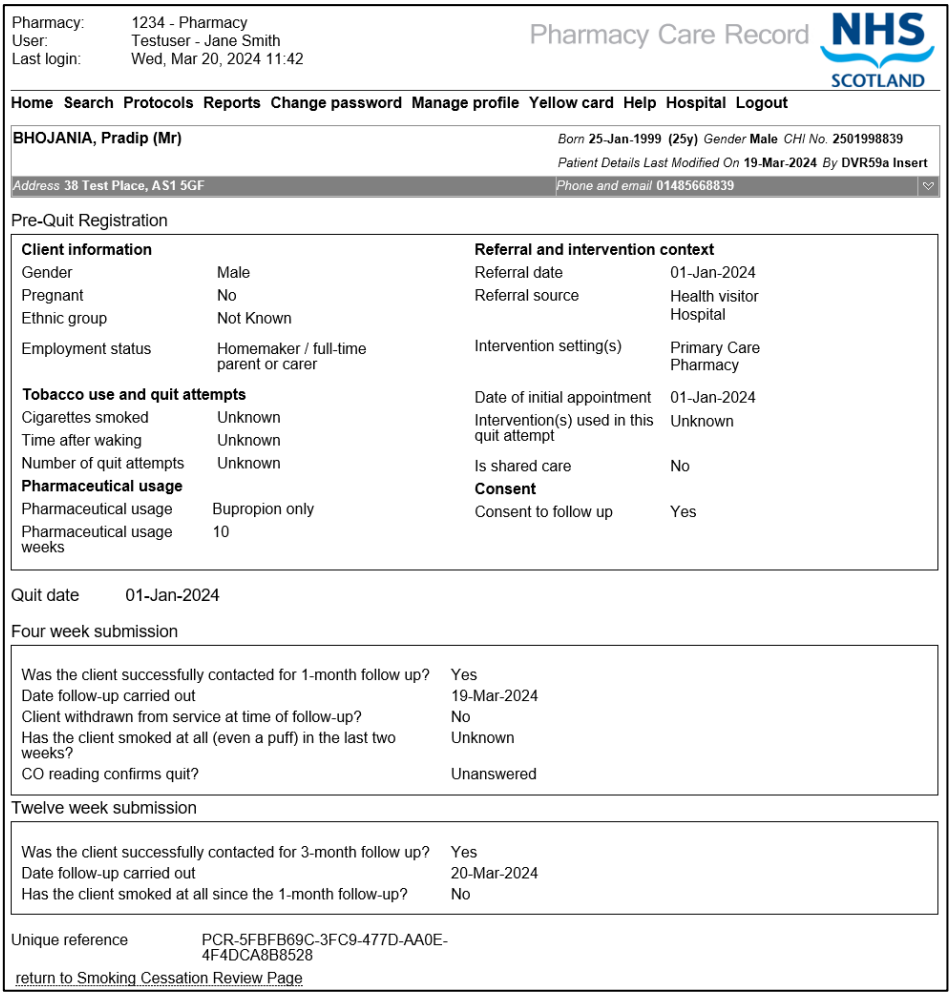


Figure 10-20: Smoking Cessation Confirm Completion

10.16View Submitted mandatory progress report

This read only view of submitted mandatory progress reports is updated with each submission.

The example in Figure 10-23 shows all submissions.



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Wed, Mar 20, 2024 11:42

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

BHOJANIA, Pradip (Mr) *Born* **25-Jan-1999 (25y)** *Gender* **Male** *CHI No.* **2501998839**
Patient Details Last Modified On **19-Mar-2024** *By* **DVR59a Insert**
Address **38 Test Place, AS1 5GF** *Phone and email* **01485668839**

Pre-Quit Registration

Client information		**Referral and intervention context**	
Gender	Male	Referral date	01-Jan-2024
Pregnant	No	Referral source	Health visitor Hospital
Ethnic group	Not Known		
Employment status	Homemaker / full-time parent or carer	Intervention setting(s)	Primary Care Pharmacy
Tobacco use and quit attempts		Date of initial appointment	01-Jan-2024
Cigarettes smoked	Unknown	Intervention(s) used in this quit attempt	Unknown
Time after waking	Unknown		
Number of quit attempts	Unknown	Is shared care	No
Pharmaceutical usage		**Consent**	
Pharmaceutical usage	Bupropion only	Consent to follow up	Yes
Pharmaceutical usage weeks	10		

Quit date 01-Jan-2024

Four week submission

Was the client successfully contacted for 1-month follow up?	Yes
Date follow-up carried out	19-Mar-2024
Client withdrawn from service at time of follow-up?	No
Has the client smoked at all (even a puff) in the last two weeks?	Unknown
CO reading confirms quit?	Unanswered

Twelve week submission

Was the client successfully contacted for 3-month follow up?	Yes
Date follow-up carried out	20-Mar-2024
Has the client smoked at all since the 1-month follow-up?	No

Unique reference PCR-5FBFB69C-3FC9-477D-AA0E-4F4DCA8B8528

return to Smoking Cessation Review Page

Figure 10-21: Submitted mandatory progress report

11 SBAR (Pharmacy Communication)

11.1 Overview

'Situation, Background, Assessment, Recommendation' known as an 'SBAR' is a communications tool that is used to help frame conversations between healthcare professionals.

Pharmacists and Pharmacy technicians can create, edit and view SBARs.

The SBAR functions in PCR include:

- Create an SBAR for a prescription query, referral, or other (user specified)
- Enter recipient, recipient organisation and date action required
- Enter Situation, Background, Assessment and Recommendation text
- Generate a PDF of the SBAR
- Add replies (received back from the recipient)
- Complete the SBAR (when no further replies are expected)

11.2 Create an SBAR and define SBAR type

To create an SBAR:

- Log into PCR and identify the patient that you want to create the SBAR for. You may need to create a new patient.
- Select the SBAR tab (on the patient home page). The SBAR list page is displayed, (Figure 11-1)
- Select the "Create SBAR" link, the "Create an SBAR" page will be displayed (Figure 11-2)

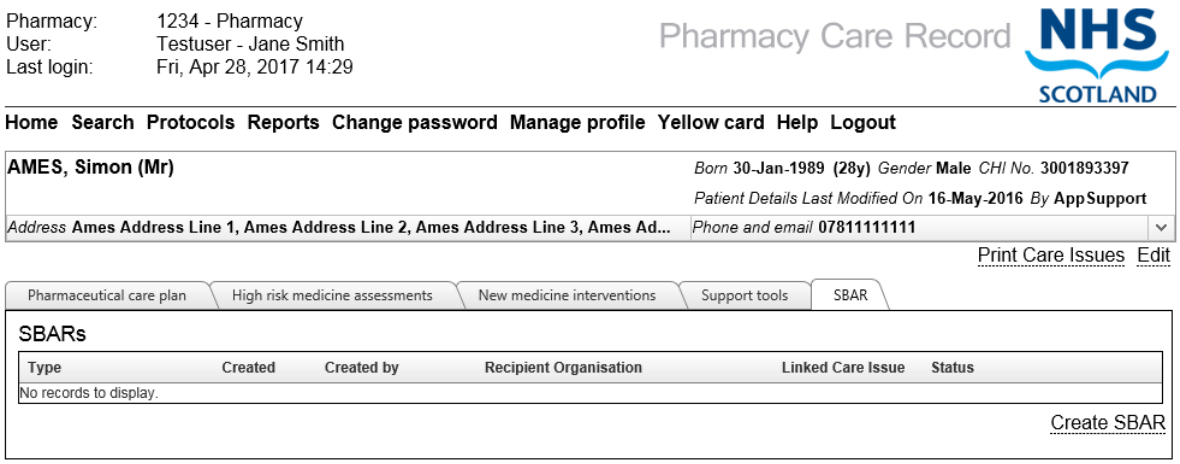


Figure 11-1 : Patient home, SBAR Tab

Note: To create an SBAR linked to a care issue refer to section 11.5

To define an SBAR type:

- Select the type of SBAR to create
- Click the Create button, the SBAR page will be displayed (Figure 11-2)

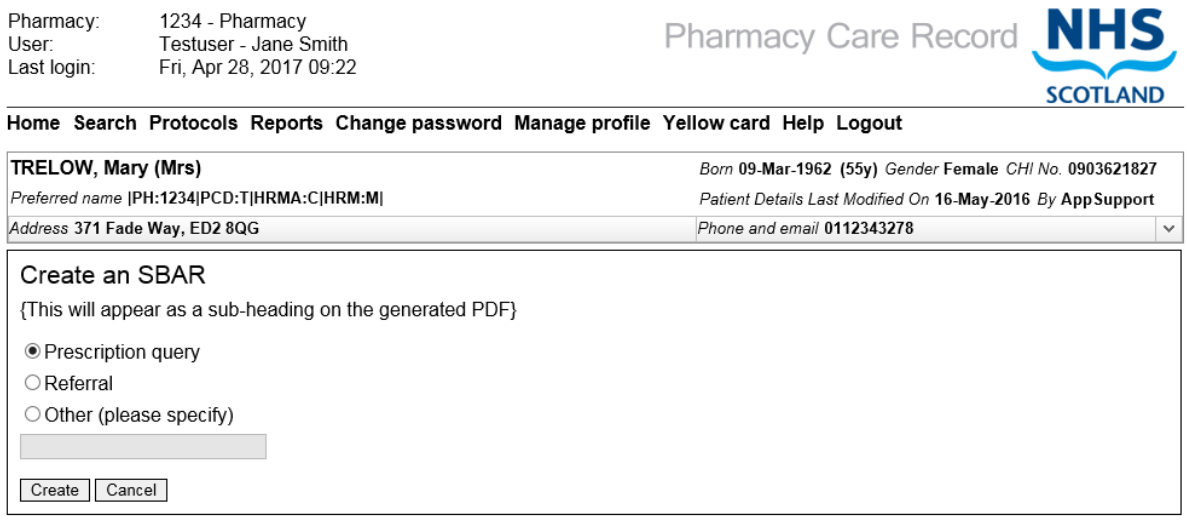


Figure 11-2: Create an SBAR

Note: If an SBAR type 'Other' is chosen a short description must also be entered. The description entered will appear at the top of the SBAR when it is generated.

11.3 Enter SBAR (Situation, Background, Assessment, Recommendation)

The SBAR edit page allows the user to enter the following information.

- Recipient
- Recipient organisation
- Action required? (Optional)
- Date action required by (Optional unless “Action required?” is selected
- Situation
- Background (Optional)
- Assessment (Optional)
- Recommendation

To record SBAR data:

- Enter SBAR text for all sections, or as much as is applicable or known (Figure 11-3)
- Click the Save button.

If any of the pre-quit registration information is invalid/missing an error message will be displayed.

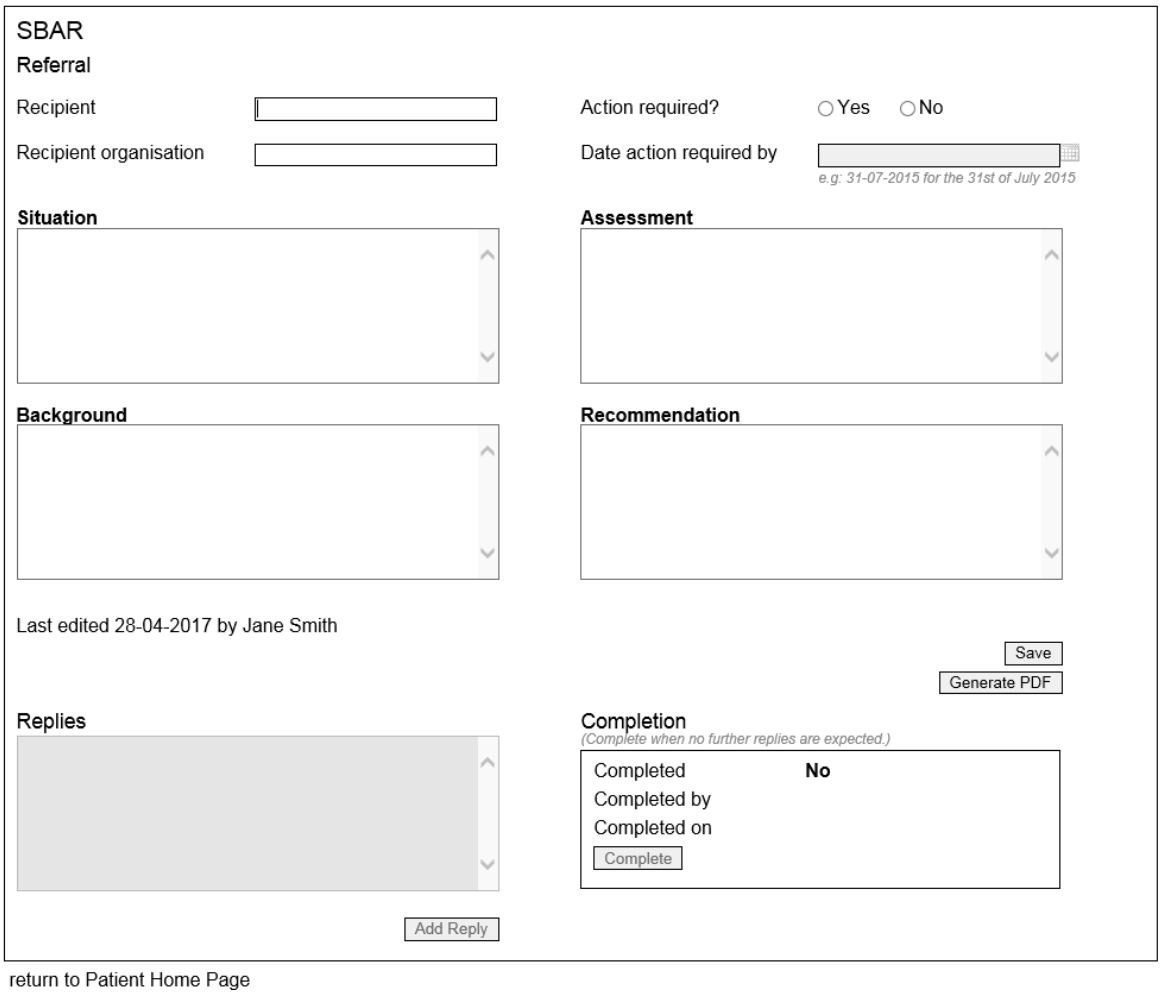


Figure 11-3: SBAR Details Page

Note: The following minimum data must be entered: Recipient, Recipient Organisation, Action required, Situation, and Recommendation.

11.4 Access existing SBARs

Existing SBARs can be accessed from the SBAR tab on the Patient Home page (Figure). Dependant on the status to which the SBAR has progressed the following operations will be available to the ongoing SBAR:

- Edit
- Generate PDF
- Add reply
- View

To access the required SBAR click on the Action link in the right hand column.

The stages through which the SBAR progresses are:

- Saved: Initial creation and ongoing edit
  - Possible actions: Complete data entry and decide to generate PDF
- Generate pdf – at this point the SBAR sections can no longer be changed
  - Possible actions: Add replies, View PDF
- Completion of the SBAR – no further replies or amendments are possible

Saved – View (Edit):

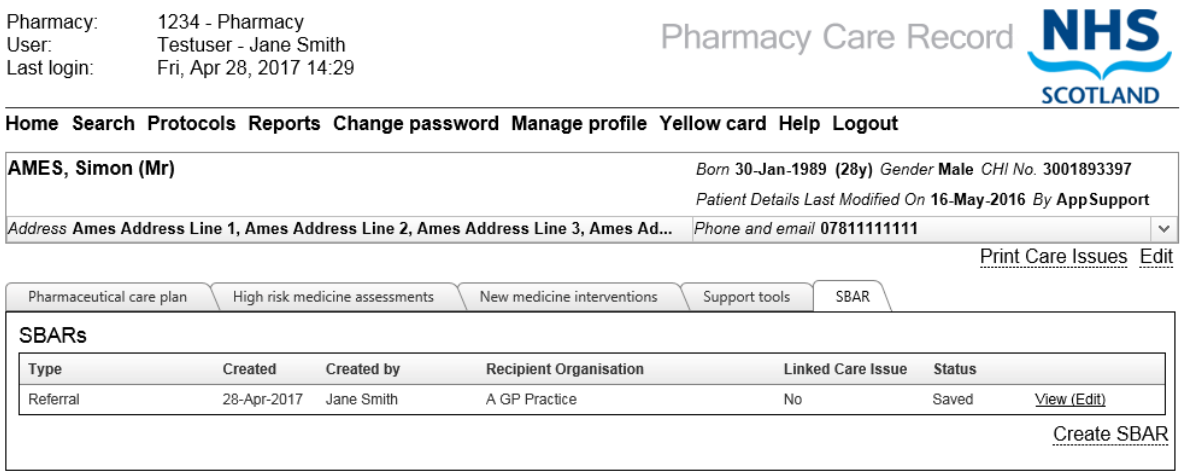


Figure 11-4: SBAR Tab, example SBAR in saved state

Generated – View (Add Reply):

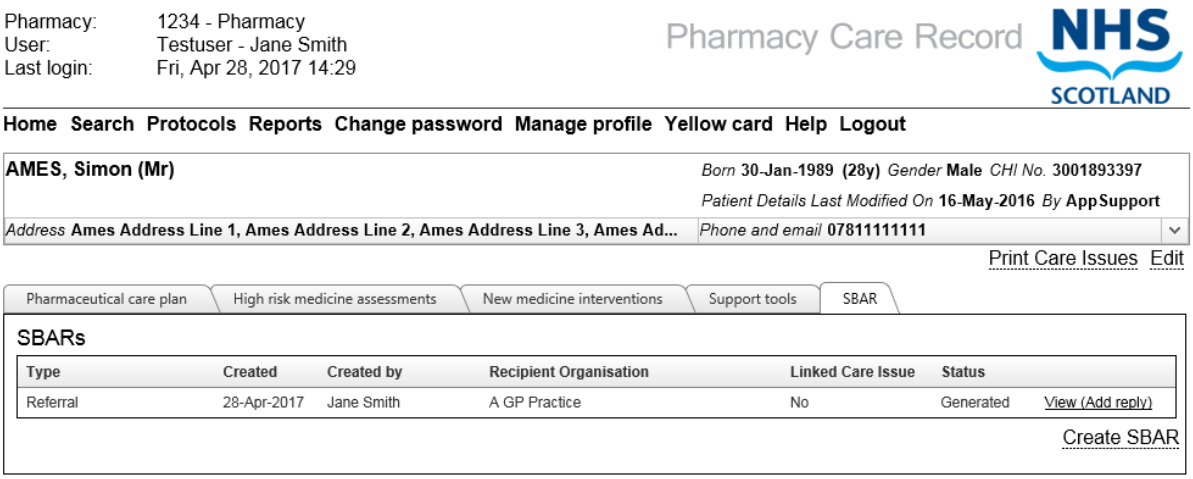


Figure 11-5: SBAR Tab, example SBAR in generated state

Generated with reply – View (Add Reply):

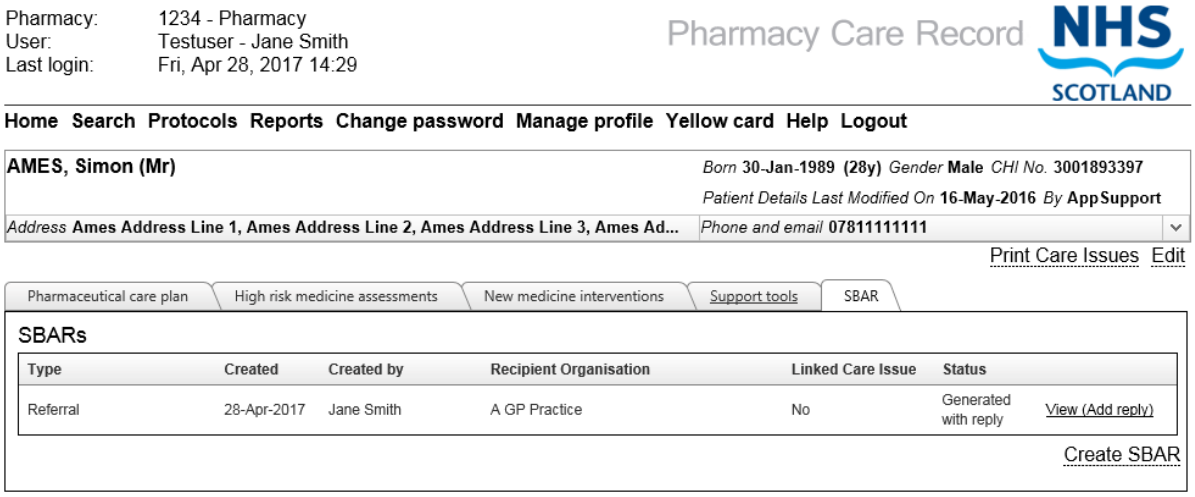


Figure 11-6: SBAR tab, example SBAR in generated with reply state

Completed – View

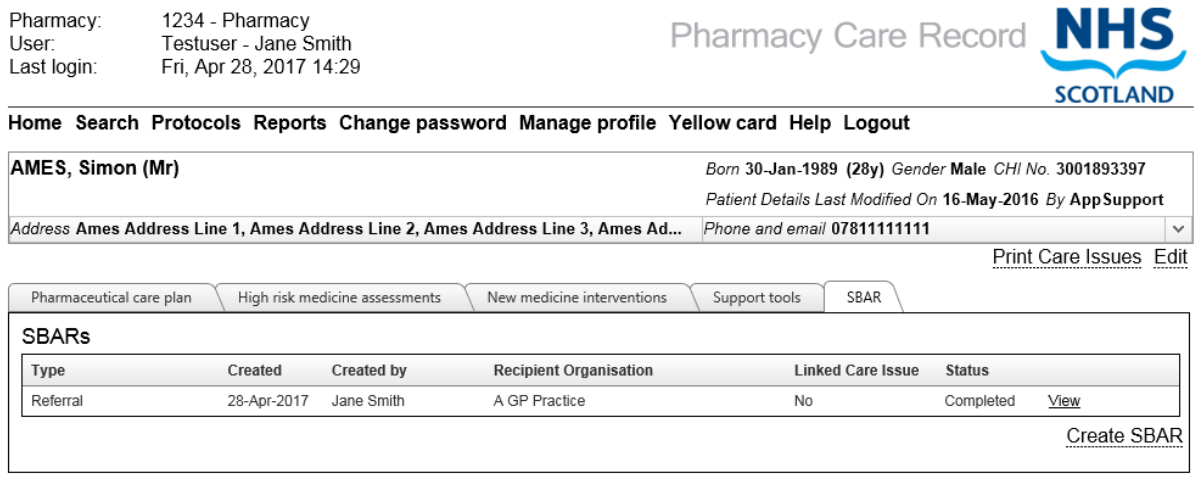


Figure 11-7: SBAR tab, example SBAR in completed state

Note: Replies can be entered only after the SBAR has been generated (see Section 10.6).

Note: The SBAR can be viewed only but not edited after the SBAR pdf has been generated.

SBARs that are linked to a Care Issue can also be accessed from the Care Issue page (Figure). Creation of an SBAR linked to a Care Issue is described in section 10.5.

11.5 Create an SBAR linked to a Care Issue

To create an SBAR linked to a Care Issue:

- Log into PCR and identify the patient that you want to create the SBAR for. You may need to create a new patient.
- Navigate to the Care Issue page by clicking on the Review link which can be found in the Care Issue section of the Patient Home page (figure).
- The Care Issue page is displayed, with any SBARs linked to this Care Issue list displayed in the bottom section of the screen, (Figure 10-1)
- Select the “Create SBAR” link, the “Create an SBAR” page will be displayed (Figure 9-2)
- Select SBAR type and click Create

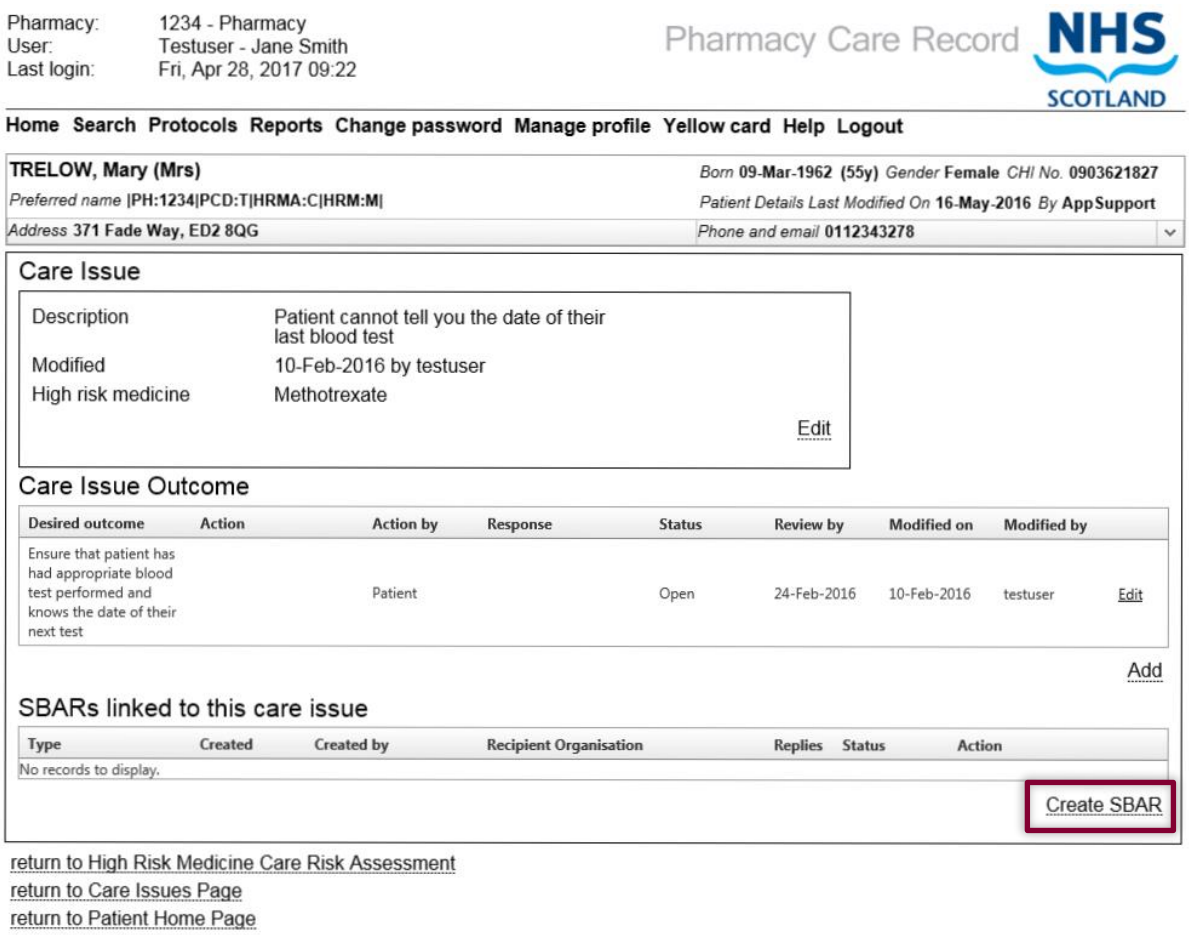


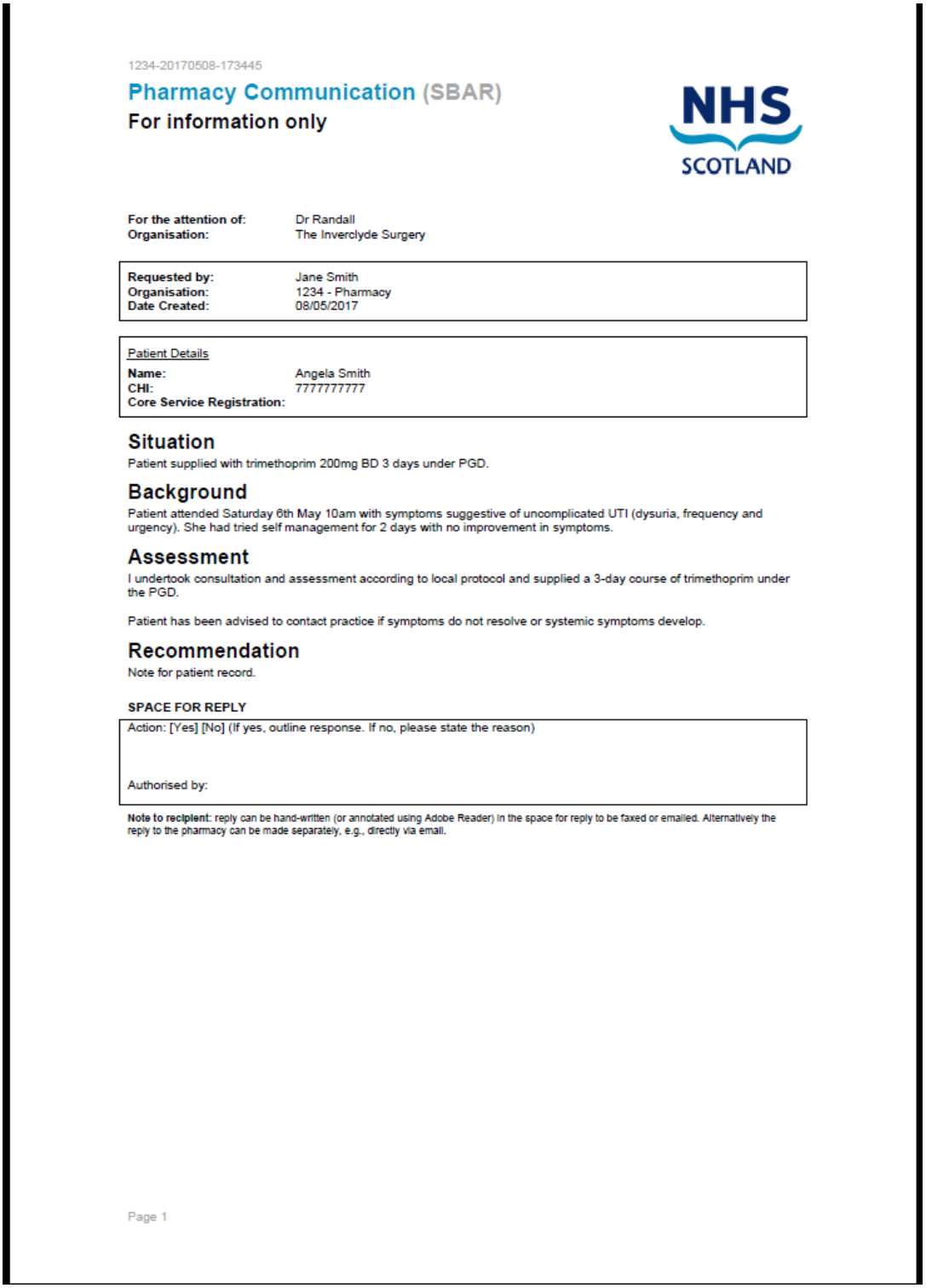
Figure 11-8:Care Issue Detail Page, SBARs linked to this care issue

Note: The Care Issue to which an SBAR is linked can be displayed by clicking on the Linked Care Issue 'Yes' link in the list of SBARs shown in the SBAR tab (Figure).

11.6 Generate pdf and add replies

When the SBAR information has been entered as far as is required before sending to any other healthcare organisation (e.g. GP Practice) the user can decide to generate the PDF of the SBAR.

To generate the SBAR pdf click on the Generate PDF button (Figure 11-3). The pdf will open automatically and can be saved to a local computer drive and then emailed or printed as necessary. The pdf can also be viewed by clicking on the View pdf button. (Figure)



1234-20170508-173445

Pharmacy Communication (SBAR)

For information only

NHS SCOTLAND

For the attention of: Dr Randall
Organisation: The Inverclyde Surgery

Requested by: Jane Smith
Organisation: 1234 - Pharmacy
Date Created: 08/05/2017

Patient Details
Name: Angela Smith
CHI: 7777777777
Core Service Registration:

Situation
Patient supplied with trimethoprim 200mg BD 3 days under PGD.

Background
Patient attended Saturday 6th May 10am with symptoms suggestive of uncomplicated UTI (dysuria, frequency and urgency). She had tried self management for 2 days with no improvement in symptoms.

Assessment
I undertook consultation and assessment according to local protocol and supplied a 3-day course of trimethoprim under the PGD.

Patient has been advised to contact practice if symptoms do not resolve or systemic symptoms develop.

Recommendation
Note for patient record.

SPACE FOR REPLY

Action: [Yes] [No] (If yes, outline response. If no, please state the reason)

Authorised by:

Note to recipient: reply can be hand-written (or annotated using Adobe Reader) in the space for reply to be faxed or emailed. Alternatively the reply to the pharmacy can be made separately, e.g., directly via email.

Page 1

Figure 11-9: SBAR generated as an Adobe PDF

Note: Following pdf generation the Situation, Background, Assessment and Recommendation text areas will not be available for further update.

To Add replies, enter text into the Replies box and click Add Reply (Figure). All replies will be displayed in a list beneath the reply box in the order entered.

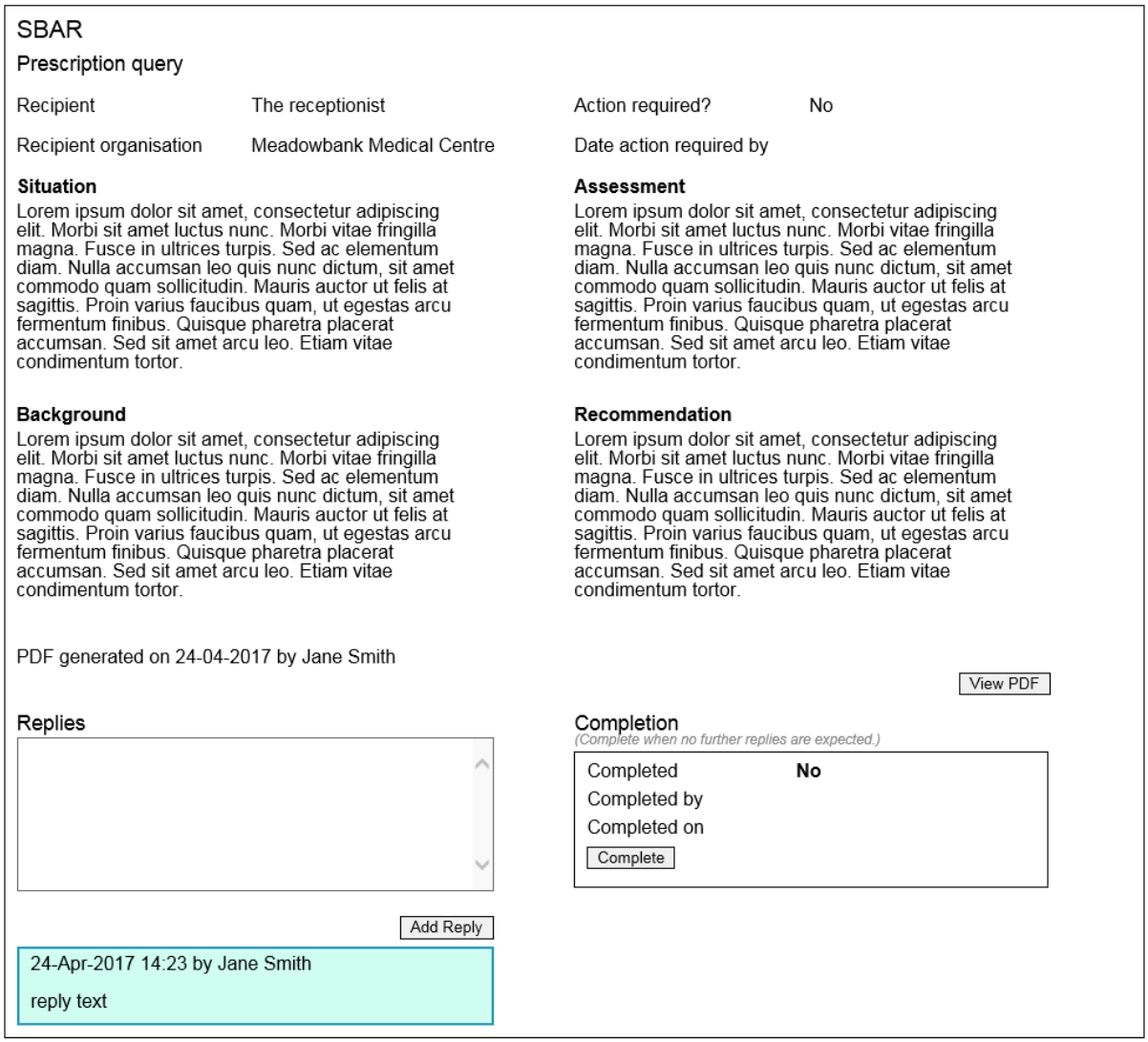


Figure 11-10: SBAR details page with added reply

The generated PDF can be viewed by selecting the "View PDF". Button.

12 Reports

12.1 Overview

Using the “Reports” function a user can obtain relevant information about patients registered in PCR for a pharmacy. The report categories are:

- Outstanding Care issues
- Patient report for {associated pharmacy}
- All SBARs
- Stage 1 medication reviews
- Stage 2 medication reviews
- Core service registrations
- Open Care Issues
- New medicine intervention support tool reports
- Gluten-free reports
- High risk medicine assessment support tool reports
- Smoking Cessation

To access the reports summary page

- Select the “Reports” link from the PCR high level menu (Figure 12-1).
- The “Reports” summary page is displayed, Figure 12-2.

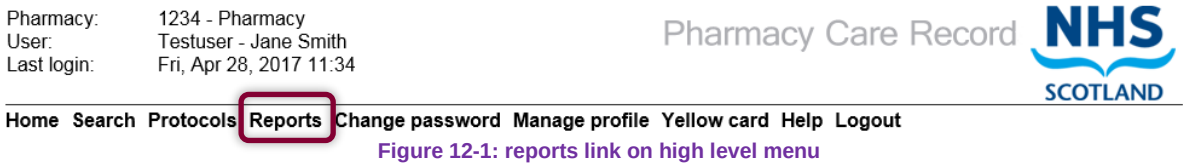


Figure 12-1: reports link on high level menu

Pharmacy: 1234 - Pharmacy
User: testuser - Jane Smith
Last login: Tue, Nov 2, 2021 10:31

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Reports

Care issue and patient report

Outstanding care issues	
Patient report for associated pharmacy	
All SBARs for associated pharmacy	[18]

Core service registrations reports

MCR

MCR registered patients with a record in PCR	[4]
MCR registered patients with NO record in PCR	[5]
MCR registered patients with initial stage 1 medication review completed	[2]
MCR registered patients with initial stage 1 medication review not completed	[2]
MCR registered Patients with Annual Stage 1 Medication Review Due/Overdue	[2]

Stage 1 medication review reports

All stage 1 medication reviews	[10]
All open stage 1 medication reviews	[4]
All completed stage 1 medication reviews	[6]
All stage 1 medication reviews with open care issues	[3]
Stage 1 medication review due (To reassess if patient suitable for serial prescribing)	[3]

Stage 2 medication review reports

All stage 2 medication reviews	[25]
All open stage 2 medication reviews	[16]
All completed stage 2 medication reviews	[9]
All stage 2 medication reviews with open care issues	[8]

Stage 3 medication review reports

All stage 3 medication reviews	[0]
All open stage 3 medication reviews	[0]
All completed stage 3 medication reviews	[0]
All stage 3 medication reviews with open care issues	[0]

Care issues

Open care issues with review date set	[83]
Open care issues with reviews due in next 7 days	[0]
Open care issues with reviews due in next 14 days	[0]
Open care issues with reviews outstanding	[81]
Open care issues with no outcome ever recorded	[21]
Open care issues with no review date set	[7]

New medicine intervention support tool reports

All new medicine interventions for the pharmacy	[26]
All open new medicine interventions	[18]
Follow ups scheduled up to TODAY	[15]
Follow ups scheduled up to 7 days from today	[15]
Follow ups scheduled up to 14 days from today	[15]
Follow ups scheduled up to 28 days from today	[15]
Open new medicine interventions without any follow ups	**[2]**
Completed new medicine interventions	[8]

Gluten-free reports

Diagnosed coeliac patients (historical)	[5]
Following a gluten-free diet	[19]
All gluten-free foods annual health checks	[30]
All incomplete (no annual review date set) Gluten-free foods annual health checks	[7]
All completed Gluten-free foods annual health checks	[18]
Gluten-free foods annual health checks due in 7 days from today	[0]
Gluten-free foods annual health checks due in 14 days from today	[0]
Gluten-free foods annual health checks due in 28 days from today	[0]
Annual health check not completed in pharmacy	[7]
Gluten-free foods annual health checks that are overdue	[13]
Following a Gluten-free diet and Gluten-free foods annual health check never completed	[5]

High risk medicine assessments support tool reports

All high risk medicine assessments for the pharmacy	[13]
All open high risk medicine assessments	[6]

Figure 12-2: Reports Page with record count highlighted

A count of the number of records in each report is shown opposite the report title in square brackets, Figure 12-2.

Record count is not shown for outstanding care issue and patient report for associated pharmacy.

12.2 Outstanding care issues report

The Outstanding care issues report shows patients with care issues that require a review between two dates (the From and To date fields at the top of the report).

To show all patients with a care issue needing a review by or before today's date by leaving the From and To dates blank and then click the Generate Report button.

With the introduction of the High Risk Medicines Care Risk assessments and new medicine interventions functionality, it is also possible to filter on Care Issue Type: "Standard", "High Risk Medicine" or "New Medicine".

To run the outstanding care issues report:

- Select the outstanding care issues link from the "Reports" page
- The outstanding care issues criteria will be displayed (Figure 12-3)

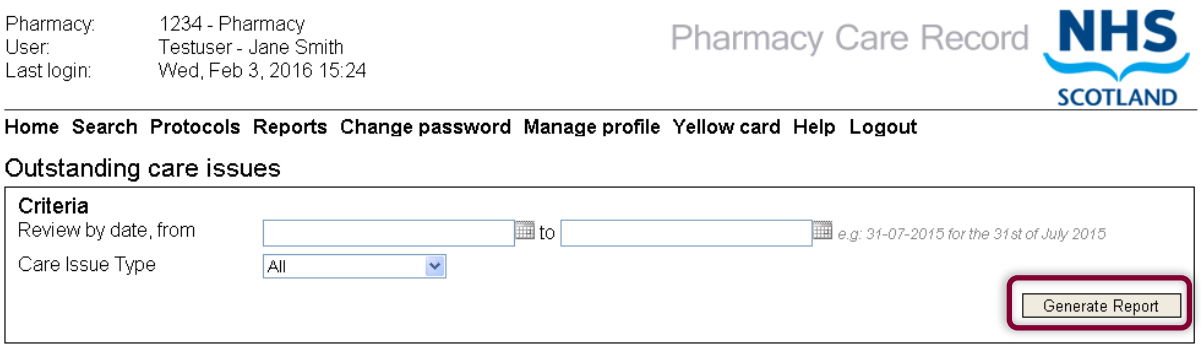


Figure 12-3: Outstanding care issues report criteria

- Select the "Generate Report" button, all outstanding care issues for the associated pharmacy will be displayed Figure 12-4

Note: *Before you generate the report, you can filter the results by date range and/or by Care Issue Type. Valid care issue types are Standard, High risk medicines, New medicine, Gluten-free, smoking cessation*

Figure 12-4: oustanding care issues report with chevrons expanded

For each patient that matches the search criteria the following information is shown:

- Patient name
- Core service registrations (If exists)
- Date of birth
- CHI
- Postcode
- “View” link (Selecting the “View” link will navigate to the corresponding patient home.)

Select the chevron link at the left and side of the list to view a summary of each care issue for the patient.

Information displayed in the expanded summary is care issue, care issue type, earliest review by, modified date.

12.3 Patient Report for {Associated Pharmacy}

The Patient Report for Associated Pharmacy allows you to view all patients at your associated pharmacy and allows you to filter the patients by the date that their Pharmacy care record was created, Pharmaceutical Care Plan Priority and if a care issue has been recorded.

This report can also be used to determine how many patient records do not have the Initial Assessment Complete flag set.

To run the patient report for associated pharmacy

- Select the “Patient Report for Associated Pharmacy” link from the “Reports” page
- The report criteria options will be displayed (Figure 12-5)
- Click the “generate report button” (Figure 12-5)

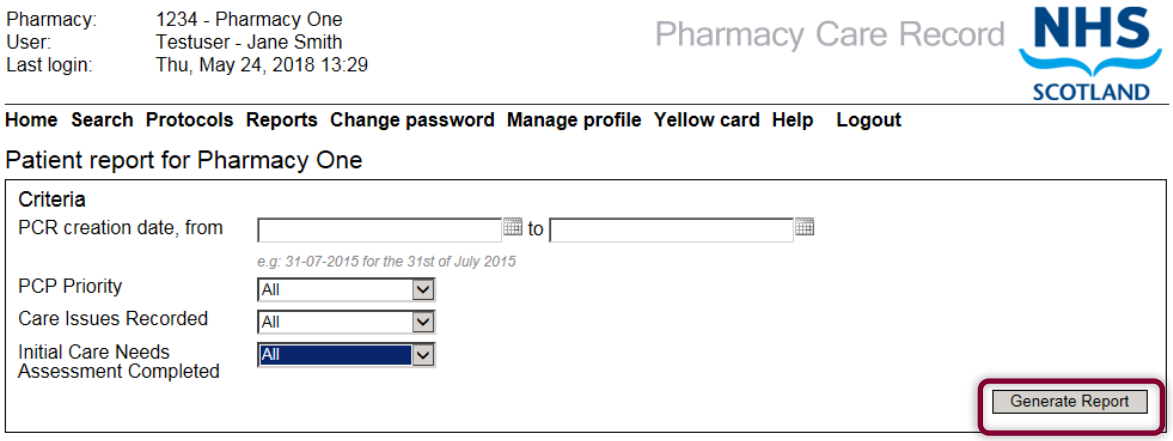


Figure 12-5: Patient Report for Associated Pharmacy – criteria

Note: If no criteria are selected all valid records will be returned.

- The report search results will be displayed (Figure 12-6)

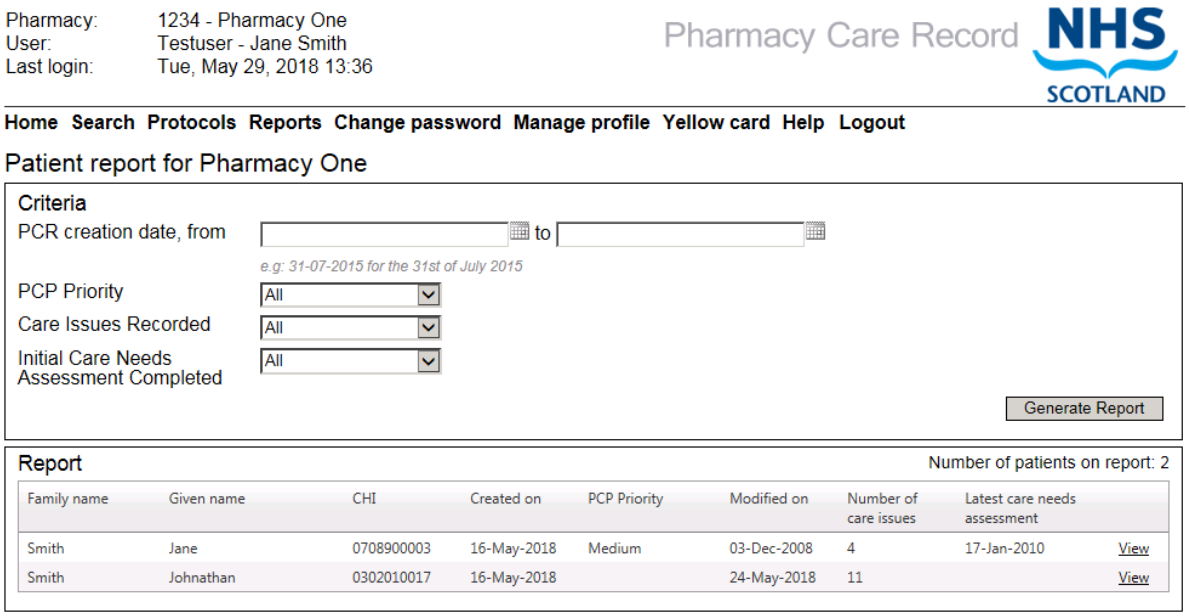


Figure 12-6: Patient Report with results

For each patient that matches the search criteria the report details the patient's:

- Family name
- Given name
- Core service registration icon
- CHI
- Created on
- PCP Priority (from most recent completed stage 1 medication review)
- Modified on
- Number of care issues
- latest stage 1 medication review (date of most recently completed stage 1 medication review)
- 'View' link (navigates to patient home)

12.4 SBAR report

12.4.1 Report Filter for SBAR reports

The SBAR report has a filter capability.

To Show/Hide the filter:

- Select “Show/Hide Filter” to toggle the report filter, shown in the example below (Figure). This will toggle the display of the filter on or off.

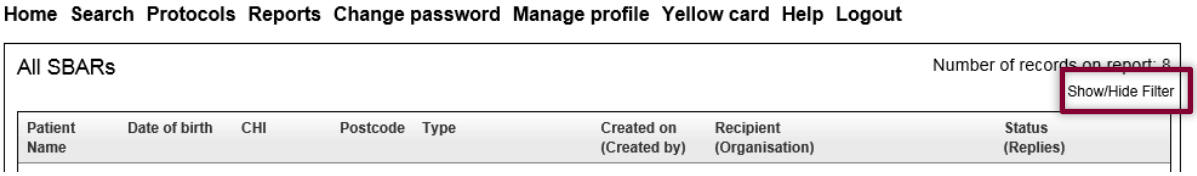


Figure 12-7

To use the filter and Exclude option:

- Enter search criteria in any the filter text boxes that correspond with the report columns. The filter will be applied as you type.
- Check the “Exclude” tickbox to include all values EXCEPT for the value you have typed. Clicking on the “Exclude” box again will toggle the Exclude option on or off.

Select “Clear” to remove filter criteria you have typed.

Note: The filter criteria you type is applied to any part of the data you are wanting to filter. For example, to filter all patients named “Smith”, enter “Smith” into the Patient Name filter box (Figure).

To list all Patients except for those named “Smith” click the Exclude box (Figure).

12.4.2 All SBARs for the pharmacy

Report Overview

The “All SBARs” report lists all SBARs for the Pharmacy (Figure).

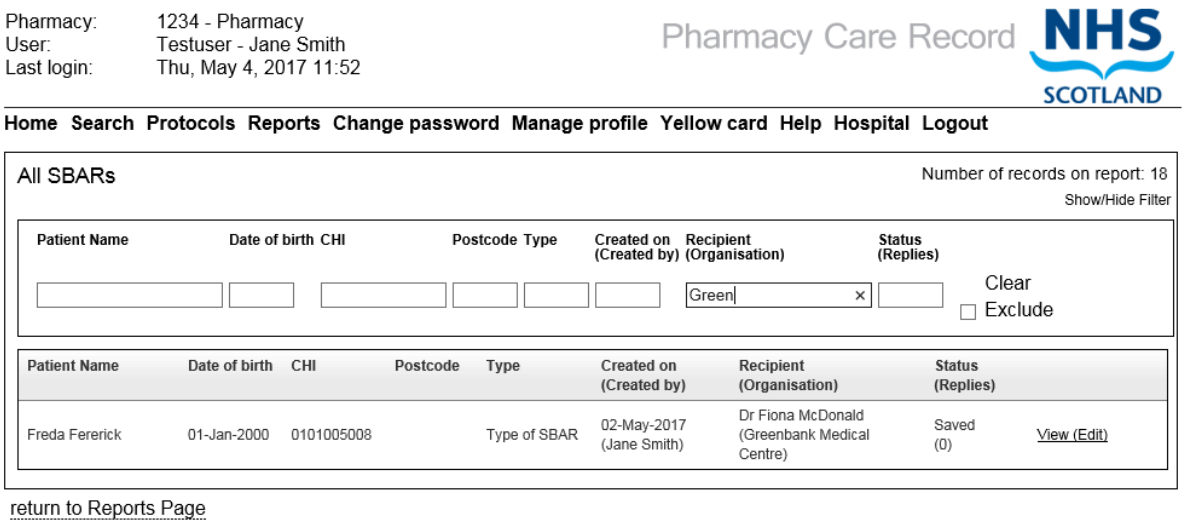


Figure 12-8: All SBARs (With example default filter applied)

Report Columns

- Patient Name
- Date of birth
- CHI
- Postcode
- Type
- Created on (created by)
- Recipient (Organisation)
- Status (Replies)

“View” Link

Select the “View”, “View (Edit)” or “View (Add reply)” link at the right-hand-side of the report to view the SBAR page for the patient.

Note: Dependant on the status to which the SBAR has progressed one of the following operations will be available – View, View (Edit) or View (Add reply).

View (Edit) is available for Saved SBARs, View (Add reply) is available for Generated SBARs and View is available for Completed SBARs.

12.5 Core service registrations

12.5.1 Overview

The following core service registrations reports are available to Pharmacist users:

MCR

MCR registered patients with a record in PCR
MCR registered patients with NO record in PCR
MCR registered patients with initial stage 1 medication review completed
MCR registered patients with initial stage 1 medication review not completed
MCR registered patients with annual stage 1 medication review Due/Overdue

To access a core service registration report, select the link from the report summary page, Figure 12-9.

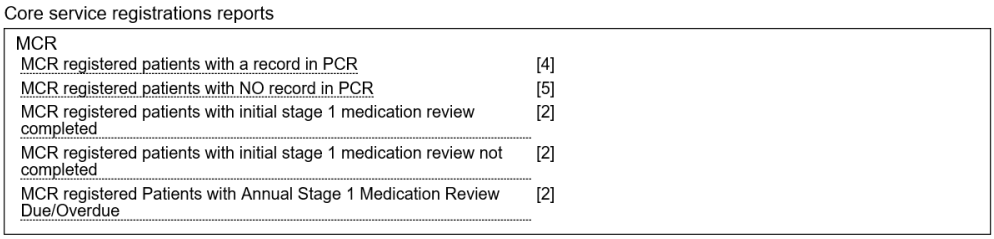


Figure 12-9: Core Service Registration Reports

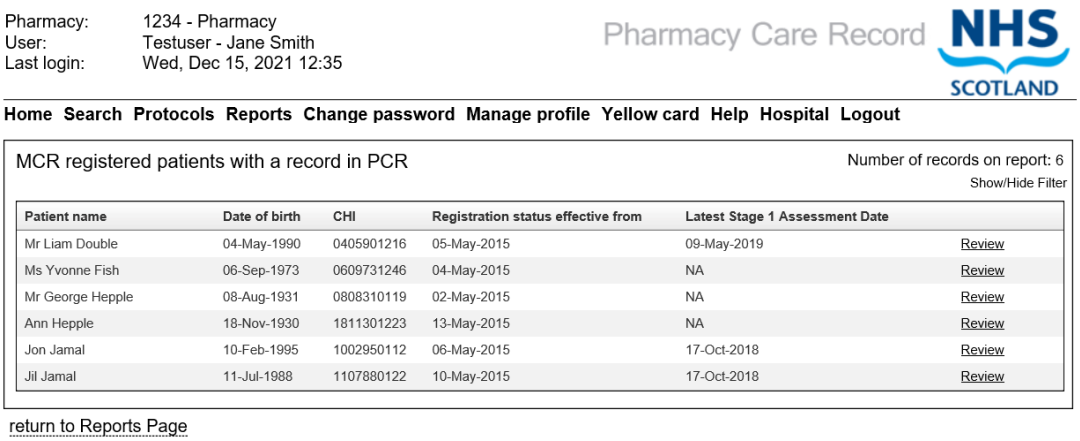
Response times for core service registration reports that may return a large number of records

Depending on the patients a pharmacy has registered for MCR, and of those patients how many have a PCR record, some of the core service registration reports may return many records. Where the number of records are large (more than 100) the response time between selecting the report and the results being displayed in the Browser may be longer (compared with other PCR reports). The following core service registration reports may be impacted.

- MCR registered patients with a record in PCR
- MCR registered patients with NO record in PCR
- MCR registered patients with initial stage 1 medication review completed
- MCR registered patients with initial stage 1 medication review not completed
- MCR registered patients with annual stage 1 medication review Due/Overdue

12.5.2 MCR registered patients with a record in PCR

12.5.2.1 Report Example



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Wed, Dec 15, 2021 12:35

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MCR registered patients with a record in PCR

Number of records on report: 6
Show/Hide Filter

Patient name	Date of birth	CHI	Registration status effective from	Latest Stage 1 Assessment Date	
Mr Liam Double	04-May-1990	0405901216	05-May-2015	09-May-2019	Review
Ms Yvonne Fish	06-Sep-1973	0609731246	04-May-2015	NA	Review
Mr George Hepple	08-Aug-1931	0808310119	02-May-2015	NA	Review
Ann Hepple	18-Nov-1930	1811301223	13-May-2015	NA	Review
Jon Jamal	10-Feb-1995	1002950112	06-May-2015	17-Oct-2018	Review
Jil Jamal	11-Jul-1988	1107880122	10-May-2015	17-Oct-2018	Review

return to Reports Page

12.5.2.2 Report Columns

- Patient Name
- Date of birth
- CHI
- Registration status effective from
- Latest Stage 1 Assessment Date
- Review (Select to link to patient home)

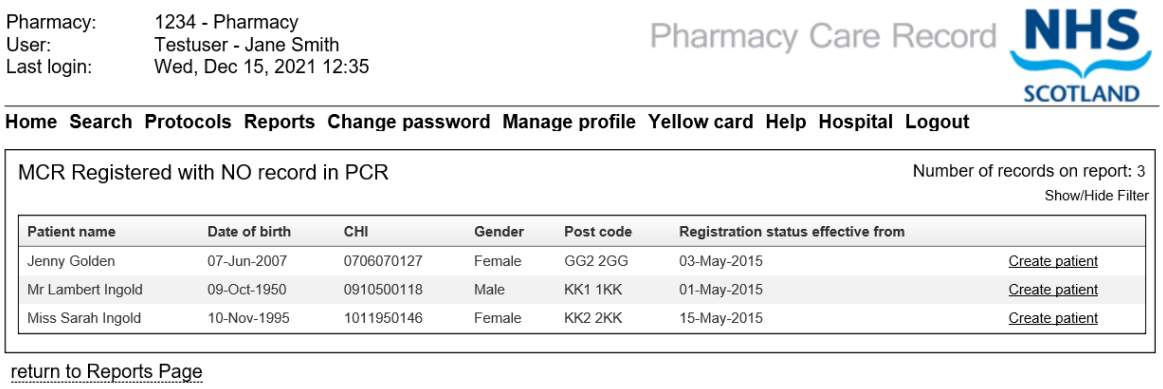
12.5.2.3 Additional Information

Access report filter by selecting “Show/Hide Filter” link on the right-hand side of the page.

This report will only report on (count) the number of MCR registered patients that have been matched against an existing PCR record. If you have patient(s) registered for MCR but no PCR record for the patient they will not be included in this report (However, see 12.5.3 for MCR registered patients with NO record in PCR).

12.5.3 MCR registered patients with NO record in PCR

12.5.3.1 Report Example



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Wed, Dec 15, 2021 12:35

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MCR Registered with NO record in PCR

Number of records on report: 3

Show/Hide Filter

Patient name	Date of birth	CHI	Gender	Post code	Registration status effective from	
Jenny Golden	07-Jun-2007	0706070127	Female	GG2 2GG	03-May-2015	Create patient
Mr Lambert Ingold	09-Oct-1950	0910500118	Male	KK1 1KK	01-May-2015	Create patient
Miss Sarah Ingold	10-Nov-1995	1011950146	Female	KK2 2KK	15-May-2015	Create patient

return to Reports Page

12.5.3.2 Report Columns

- Patient Name
- Date of birth
- CHI
- Gender
- Postcode
- Registration status effective from
- Create Patient (Select to launch create patient process)

12.5.3.3 Additional Information

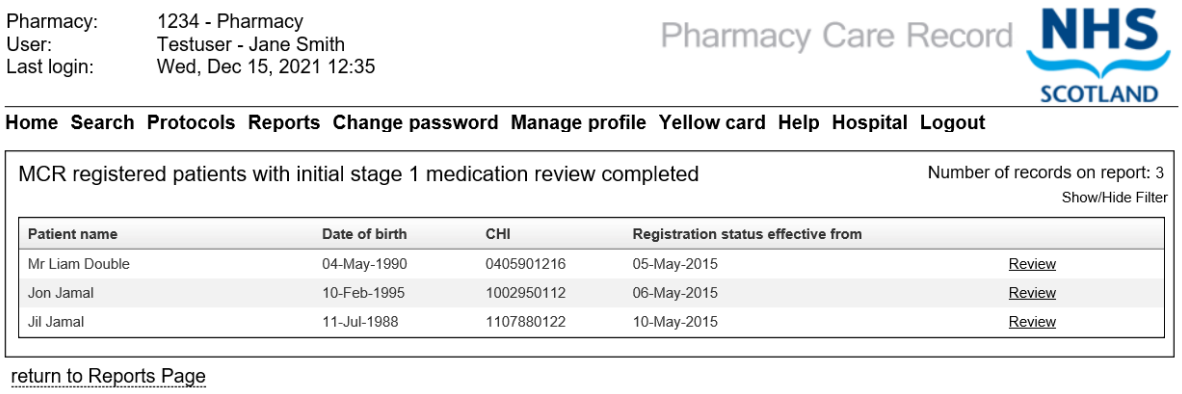
Access report filter by selecting “Show/Hide Filter” link on the right-hand side of the page.

This report will only report on (count) the number of MCR registered patients that have NOT been matched against an existing PCR record. If you have patient(s) registered for MCR but no PCR record for the patient, they will be included in this report and the ‘Create patient’ link supports in the creation of a PCR patient record. (See 10.4.2 for MCR registered patients who do have an existing record on PCR).

Selecting the create patient link will use the basic patient demographic information to pre-populate the PCR create patient screen to support creation of a PCR record. Please note that the information received from the Patient Registration Service will be the information provided when the patient was originally registered for the service. There may be more up-to-date information available on the patient PMR record and therefore it would be prudent to create the patient record utilising the PMR to PCR link in order that the information between the two is consistent and up-to-date.

12.5.4 MCR registered patients with initial stage 1 medication review completed

12.5.4.1 Report Example



12.5.4.2 Report Columns

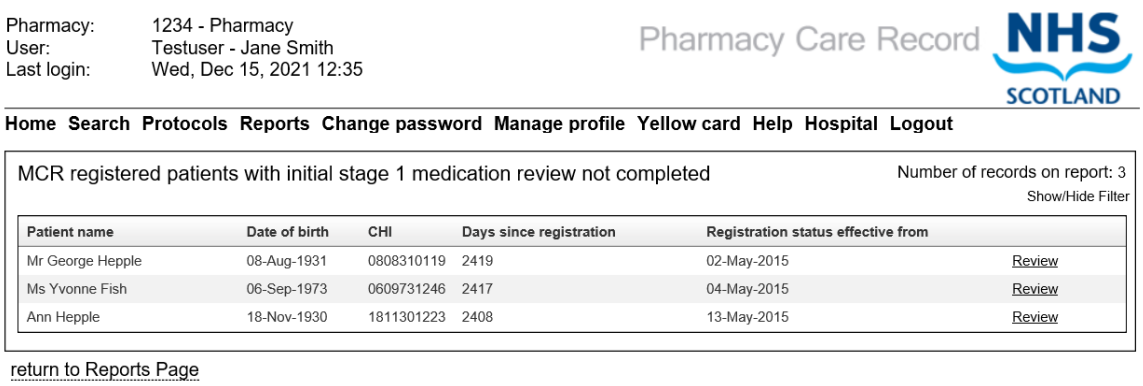
- Patient Name
- Date of birth
- CHI
- Registration status effective from
-
- Review (Select to link to patient home)

12.5.4.3 Additional Information

Access report filter by selecting “Show/Hide Filter” link on the right-hand side of the page.

12.5.5 MCR registered patients with initial stage 1 medication review not completed

12.5.5.1 Report example



12.5.5.2 ***Report columns***

- Patient Name
- Date of birth
- CHI
- Days since registration
- Registration status effective from
- Review (Select to link to patient home)

12.5.5.3 Additional Information

Access report filter by selecting “Show/Hide Filter” link on the right-hand side of the page.

12.5.6 MCR registered patients with Annual Stage 1 Medication Review Due/Overdue

12.5.6.1 Report Overview

The updated MCR guidelines require the pharmacist to conduct annual pharmaceutical assessments (using the Stage 1 Medication Review) each year within the period of 16 weeks beginning with the anniversary of the date of the eligible person's MCR registration.

The period of one year starting on the anniversary of the person's MCR registration date is termed as "Annual Assessment period" for the purpose of elaborating this report.
Thus,

- The 'Current Annual Assessment period' is the Annual Assessment Period starting on the day of the latest MCR Anniversary date
- The 'Preceding Annual Assessment period' is the Annual Assessment Period preceding the Current Annual Assessment Period.

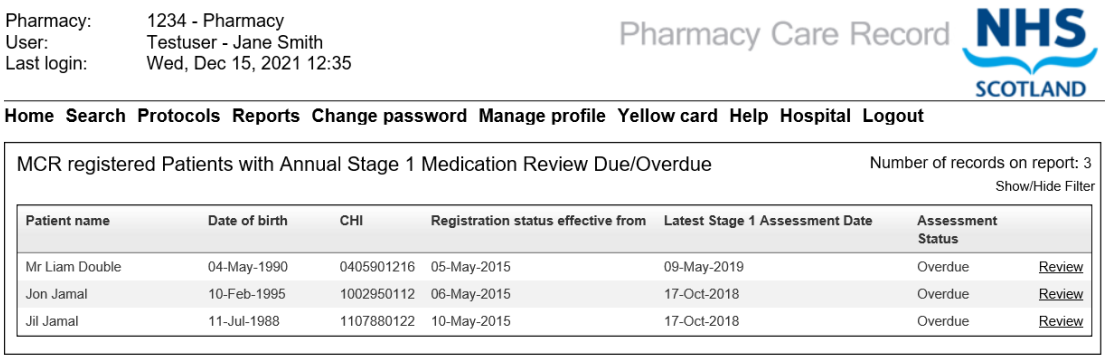
'**Grace Period'** within the Annual Assessment period is the period of 16 weeks starting on the MCR Anniversary date. An Annual Stage 1 Medication Review is 'Due' for a MCR registered person within this period , unless completed. Once this period expires, the Annual Stage 1 Medication review will be "Overdue" for that person unless completed.

12.5.6.2 Scenarios

For the scenarios below, assume that the current date is 01-Nov-2021

Scenario #	Patient Name	MCR registration Effective from	Latest completed Stage 1 Medication Review Date	Annual Stage 1 Medication Review Status
1	Patient 1	12-Oct-2017	15-Oct-2021	Not Applicable – compliant
2	Patient 2	12-Oct-2017	04-Apr-2021	Due
3	Patient 3	01-Jun-2017	03-Apr-2021	Overdue
4	Patient 4	12-Oct-2017	02-Feb-2020	Overdue
5	Patient 5	12-Oct-2020	05-Oct-2020	Overdue

12.5.6.3 Report Example



12.5.6.4 Report Columns

- Patient Name
- Date of birth
- CHI
- Registration status effective from
- Latest Stage 1 Assessment Date
- Assessment Status
- Review (Select to link to patient home)

12.5.6.5 Additional Information

Access report filter by selecting “Show/Hide Filter” link on the right-hand side of the page.

This report will only report on (count) the number of MCR registered patients that have been matched against an existing PCR record. If you have patient(s) registered for MCR but no PCR record for the patient they will not be included in this report (However, see 12.5.3 for MCR registered patients with NO record in PCR).

12.6 Open Care Issue reports

12.6.1 Overview

The following Open care issue reports are available:

- Open care issues with review date set
- Open care issues with reviews due in next 7 days
- Open care issues with reviews due in next 14 days
- Open care issues with reviews outstanding
- Open care issues with no outcome ever recorded
- Open care issues with no review date set

All Open Care Issue reports have a report filter that can be accessed via the “Show/Hide Filter” link. “Open Care issue with review date set” shown as example, Figure 12-10

The filter is applied automatically as you type.

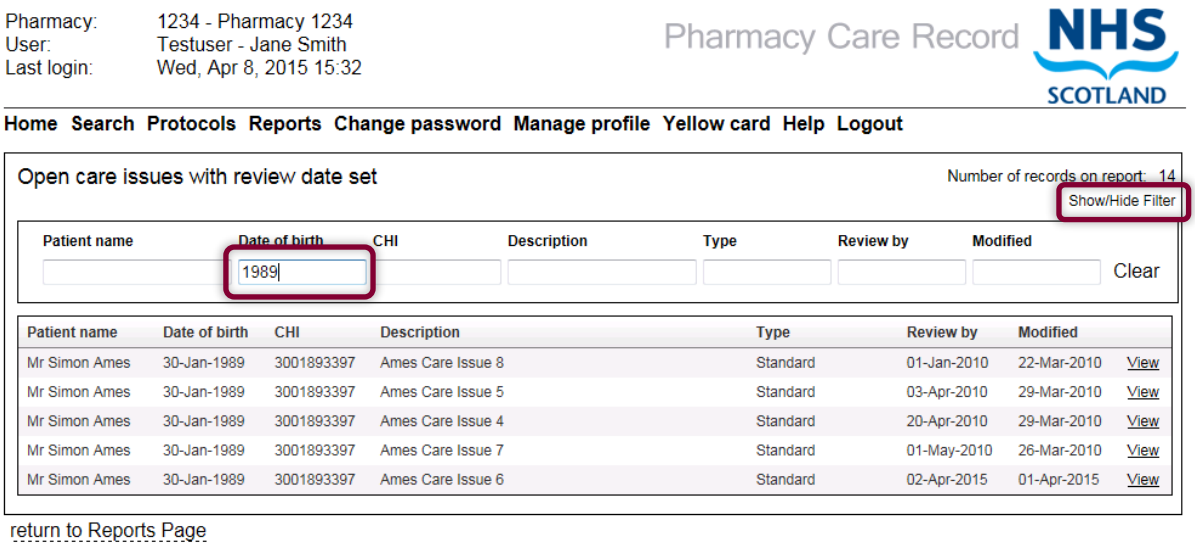
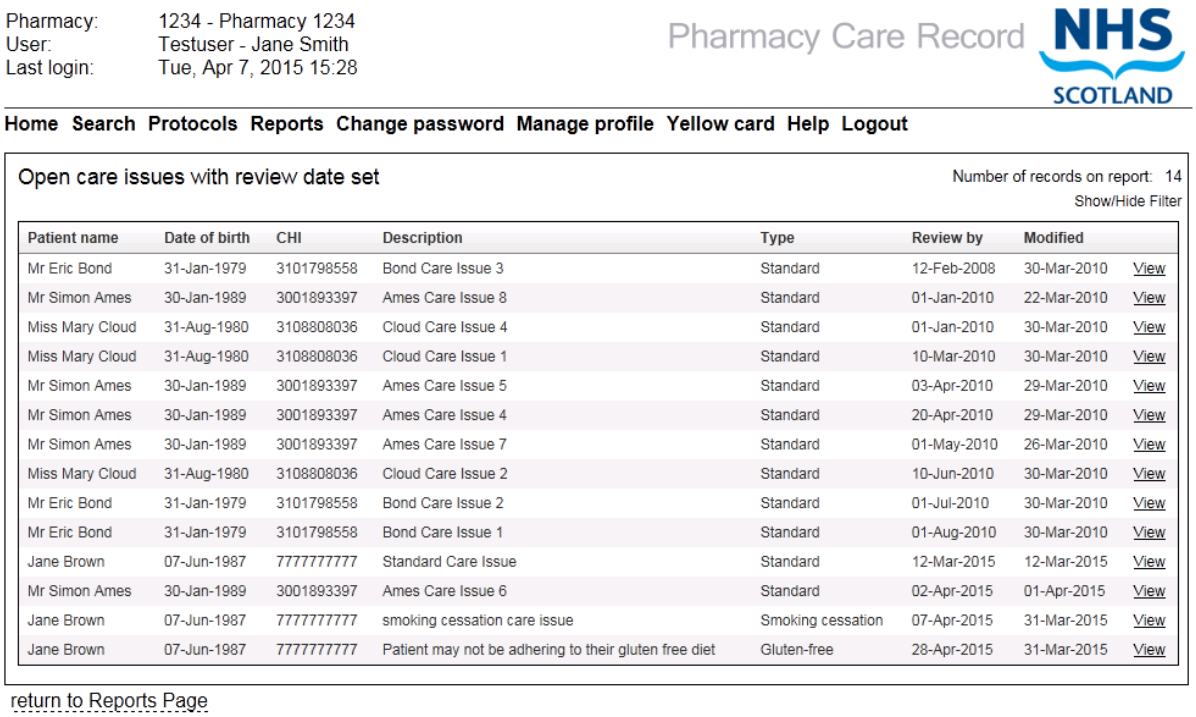


Figure 12-10: Report Filter Example

12.6.2 Open Care issues with review date set

To run the "Open Care issues with review date set" report:

- Select the "Open Care issues with review date set" link from the "Reports" page
- The report detail will be displayed, Figure 12-11



Pharmacy: 1234 - Pharmacy 1234
User: Testuser - Jane Smith
Last login: Tue, Apr 7, 2015 15:28

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Open care issues with review date set

Number of records on report: 14
Show/Hide Filter

Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 3	Standard	12-Feb-2008	30-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	01-Jan-2010	22-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 4	Standard	01-Jan-2010	30-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 1	Standard	10-Mar-2010	30-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 5	Standard	03-Apr-2010	29-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 4	Standard	20-Apr-2010	29-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 7	Standard	01-May-2010	26-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 2	Standard	10-Jun-2010	30-Mar-2010	View
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	View
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	View
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	12-Mar-2015	12-Mar-2015	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 6	Standard	02-Apr-2015	01-Apr-2015	View
Jane Brown	07-Jun-1987	7777777777	smoking cessation care issue	Smoking cessation	07-Apr-2015	31-Mar-2015	View
Jane Brown	07-Jun-1987	7777777777	Patient may not be adhering to their gluten free diet	Gluten-free	28-Apr-2015	31-Mar-2015	View

return to Reports Page

Figure 12-11: Open Care issues with review date set

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

View Link

Links to "View Care Issue" Page.

12.6.3 Open care issues with reviews due in the next 7 days

To run the ”Open care issues with reviews due in the next 7 days” report:

- Select the “Open Care issues with review due in the next 7 days” link from the “Reports” page
- The report detail will be displayed, Figure 12-12.

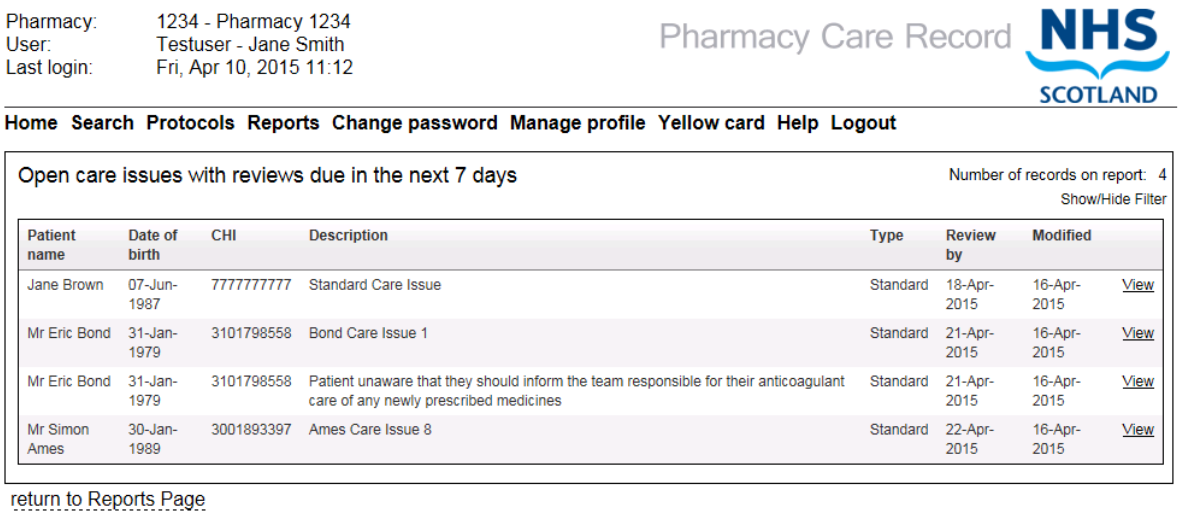


Figure 12-12: Open Care issues with review due in the next 7 days

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

View Link

Links to “View Care Issue” Page.

12.6.4 Open care issues with reviews due in the next 14 days

To run the "Open care issues with reviews due in the next 14 days" report:

- Select the "Open Care issues with reviews due in the next 14 days" link from the "Reports" page
- The report detail will be displayed, Figure 12-13.

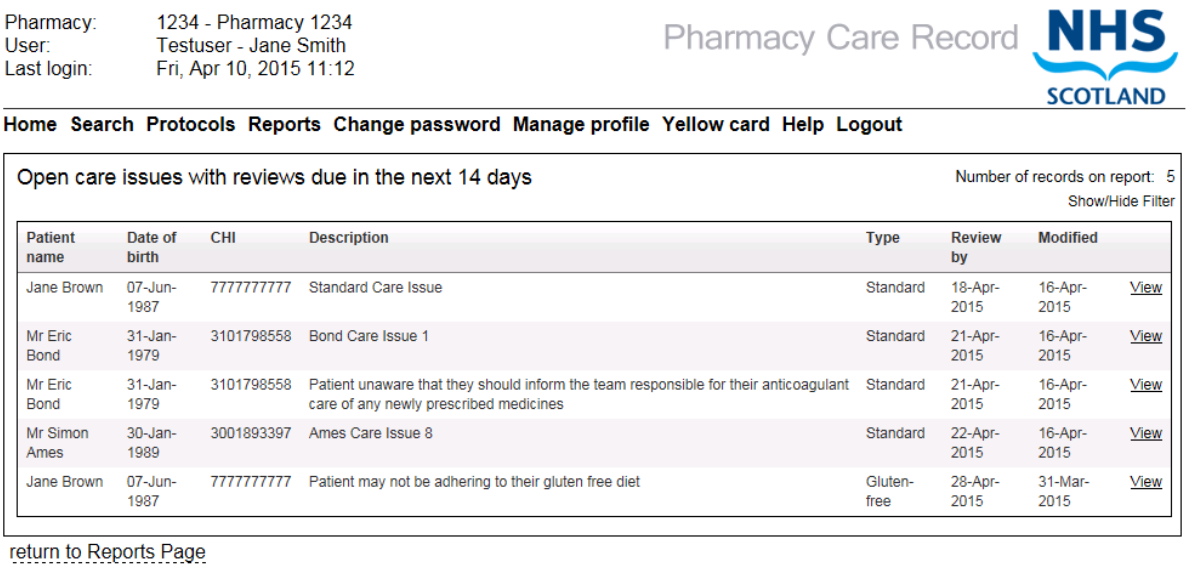


Figure 12-13: Open Care issues with review date up to and including 14 days

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

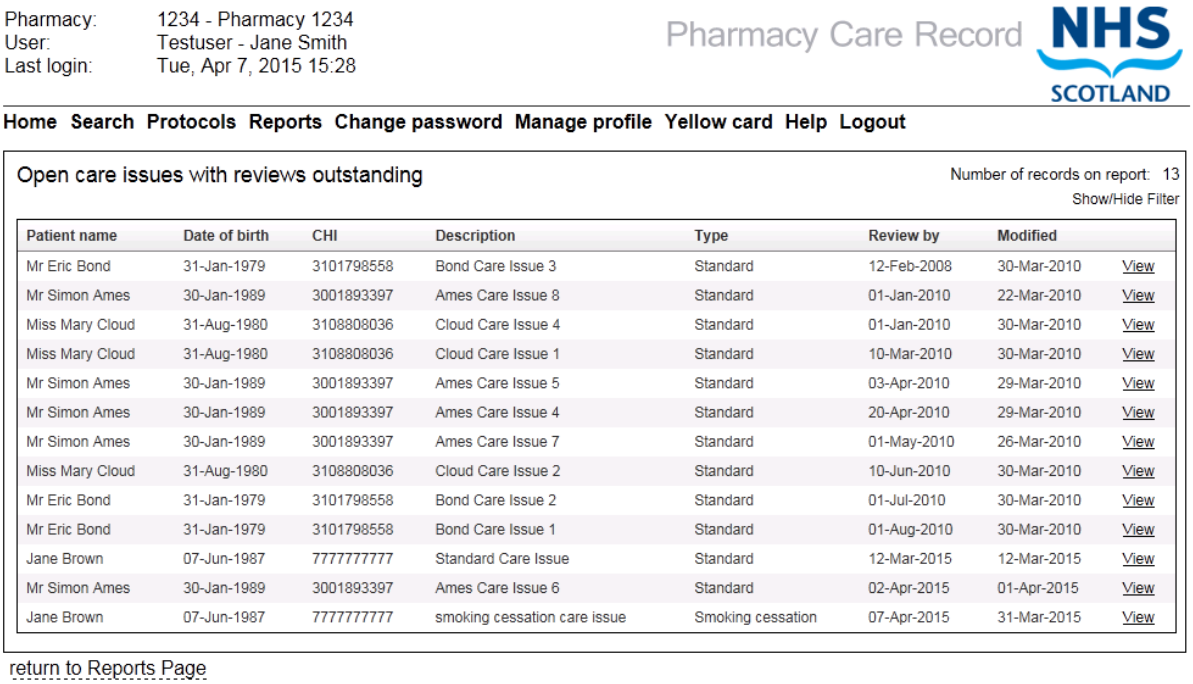
View Link

Links to "View Care Issue" Page.

12.6.5 Open care issues with reviews outstanding

To run the "Open care issues with reviews outstanding" report:

- Select the "Open care issues with reviews outstanding" link from the "Reports" page.
- The report detail will be displayed, Figure 12-14.



Pharmacy: 1234 - Pharmacy 1234
User: Testuser - Jane Smith
Last login: Tue, Apr 7, 2015 15:28

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Open care issues with reviews outstanding

Number of records on report: 13
Show/Hide Filter

Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 3	Standard	12-Feb-2008	30-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	01-Jan-2010	22-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 4	Standard	01-Jan-2010	30-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 1	Standard	10-Mar-2010	30-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 5	Standard	03-Apr-2010	29-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 4	Standard	20-Apr-2010	29-Mar-2010	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 7	Standard	01-May-2010	26-Mar-2010	View
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 2	Standard	10-Jun-2010	30-Mar-2010	View
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	View
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	View
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	12-Mar-2015	12-Mar-2015	View
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 6	Standard	02-Apr-2015	01-Apr-2015	View
Jane Brown	07-Jun-1987	7777777777	smoking cessation care issue	Smoking cessation	07-Apr-2015	31-Mar-2015	View

return to Reports Page

Figure 12-14: Open care issues with review date in the past

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

View Link

Links to "View Care Issue" Page.

12.6.6 Open care issues with no outcome ever recorded

To run the "Open care issues with no outcome ever recorded" report:

- Select the "Open care issues with no outcome ever recorded" link from the "Reports" page.
- The report detail will be displayed, Figure 12-15.

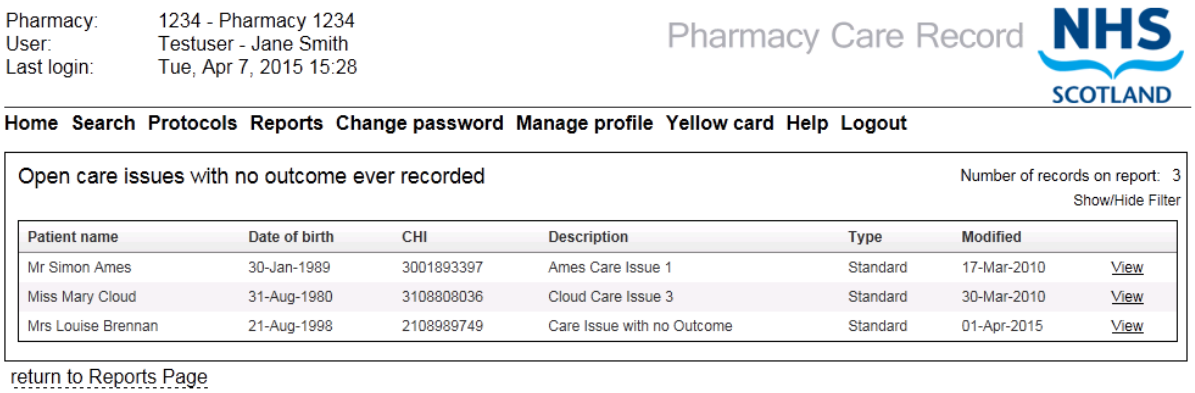


Figure 12-15: Open care issues with no outcome ever recorded

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Modified (Default Sort, Ascending)

View Link

Links to "View Care Issue" Page.

12.6.7 Open care issues with no review date set

To run the "Open care issues with no review date set" report:

- Select the "Open care issues with no review date set" link from the "Reports" page
- The report detail will be displayed

Figure 12-16: Open care issues with no review date set

Report Columns

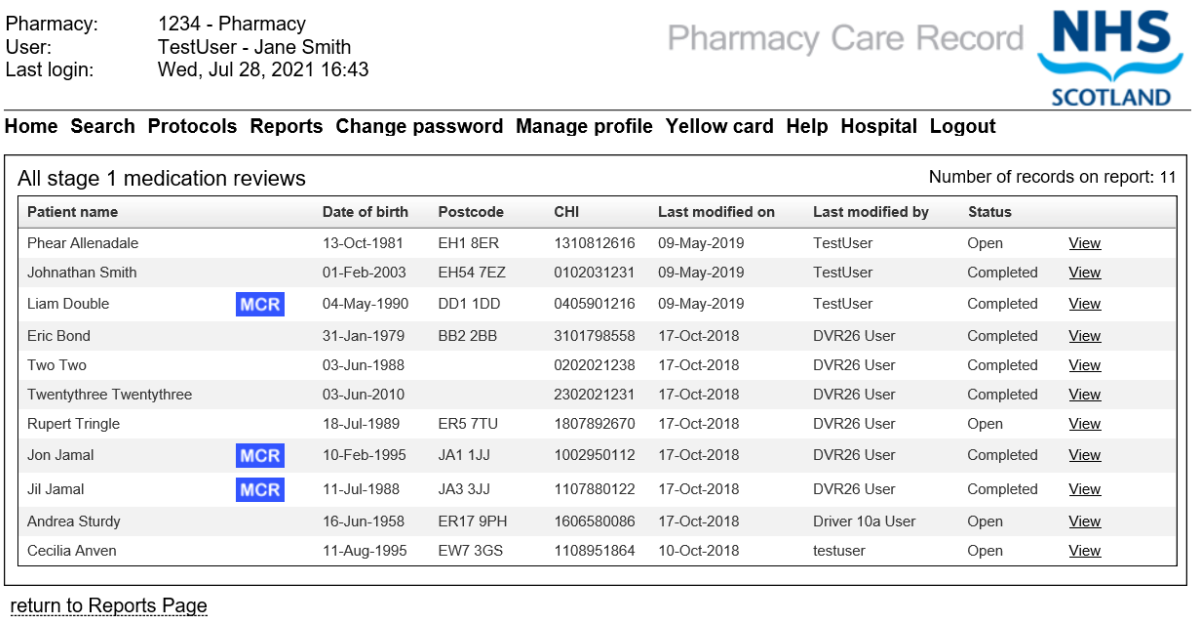
- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Modified (Default Sort, Ascending)

View Link

Links to "View Care Issue" Page.

12.7 Stage 1 medication review reports

12.7.1 All stage 1 medication reviews



Patient name		Date of birth	Postcode	CHI	Last modified on	Last modified by	Status	
Phear Allenadale		13-Oct-1981	EH1 8ER	1310812616	09-May-2019	TestUser	Open	View
Johnathan Smith		01-Feb-2003	EH54 7EZ	0102031231	09-May-2019	TestUser	Completed	View
Liam Double	MCR	04-May-1990	DD1 1DD	0405901216	09-May-2019	TestUser	Completed	View
Eric Bond		31-Jan-1979	BB2 2BB	3101798558	17-Oct-2018	DVR26 User	Completed	View
Two Two		03-Jun-1988		0202021238	17-Oct-2018	DVR26 User	Completed	View
Twentythree Twentythree		03-Jun-2010		2302021231	17-Oct-2018	DVR26 User	Completed	View
Rupert Tringle		18-Jul-1989	ER5 7TU	1807892670	17-Oct-2018	DVR26 User	Open	View
Jon Jamal	MCR	10-Feb-1995	JA1 1JJ	1002950112	17-Oct-2018	DVR26 User	Completed	View
Jil Jamal	MCR	11-Jul-1988	JA3 3JJ	1107880122	17-Oct-2018	DVR26 User	Completed	View
Andrea Sturdy		16-Jun-1958	ER17 9PH	1606580086	17-Oct-2018	Driver 10a User	Open	View
Cecilia Anven		11-Aug-1995	EW7 3GS	1108951864	10-Oct-2018	testuser	Open	View

Report Columns

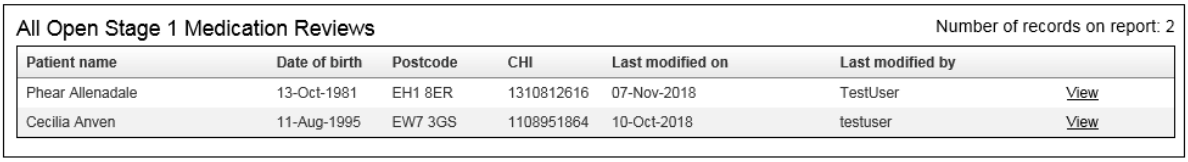
- Patient name
- Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default sort: ascending)
- Last Modified by
- Status

View Link

Links to “Stage 1 medication review summary” page.

12.7.2 All open stage 1 medication reviews

Screen layout



All Open Stage 1 Medication Reviews — Number of records on report: 2

Patient name	Date of birth	Postcode	CHI	Last modified on	Last modified by	
Phear Allenadale	13-Oct-1981	EH1 8ER	1310812616	07-Nov-2018	TestUser	View
Cecilia Anven	11-Aug-1995	EW7 3GS	1108951864	10-Oct-2018	testuser	View

return to Reports Page

Report Columns

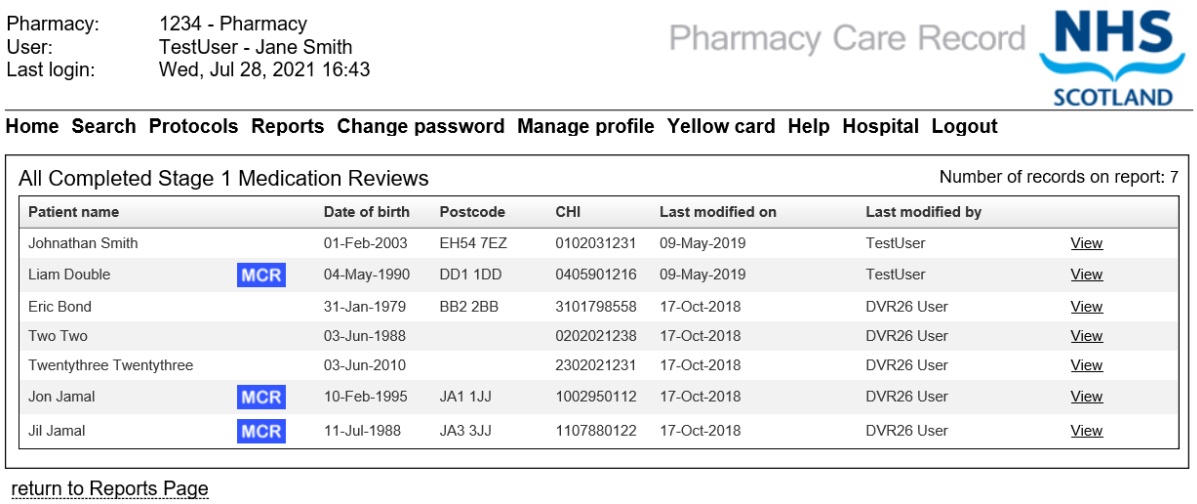
- Patient name
  - Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default sort: ascending)
- Last Modified by

“View” Link

Links to “Stage 1 medication review summary” page.

12.7.3 All completed stage 1 medication reviews

Report layout



Report Columns

- Patient name
  - Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort, Ascending)
- Last Modified by

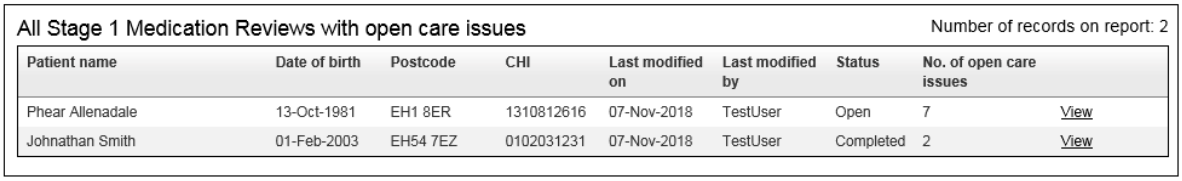
“View” Link

Links to “Stage 1 medication review summary” Page.

12.7.4 All stage 1 medication reviews with open care issues

This report will display all care issues associated with a stage 1 medication review that was created using the one-click care issue creation function on the stage 1 medication review summary page (see section 6.7.5).

Report layout



All Stage 1 Medication Reviews with open care issues — Number of records on report: 2

Patient name	Date of birth	Postcode	CHI	Last modified on	Last modified by	Status	No. of open care issues	
Phear Allenadale	13-Oct-1981	EH1 8ER	1310812616	07-Nov-2018	TestUser	Open	7	View
Johnathan Smith	01-Feb-2003	EH54 7EZ	0102031231	07-Nov-2018	TestUser	Completed	2	View

return to Reports Page

Report Columns

- Patient name
- Core service indicator icon (If applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort: ascending)
- Last Modified by
- Status
- No. of open care issues

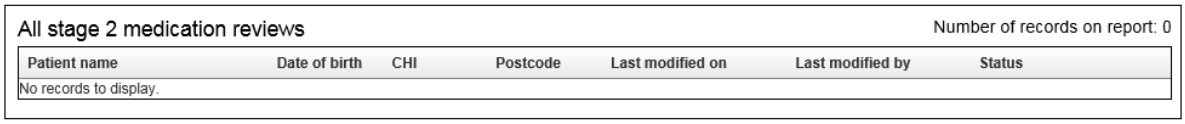
“View” Link

Links to “Stage 1 medication review summary” Page.

12.8 Stage 2 medication review reports

12.8.1 All stage 2 medication reviews

Report layout


All stage 2 medication reviews

Number of records on report: 0

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status
No records to display.						

return to Reports Page

Report Columns

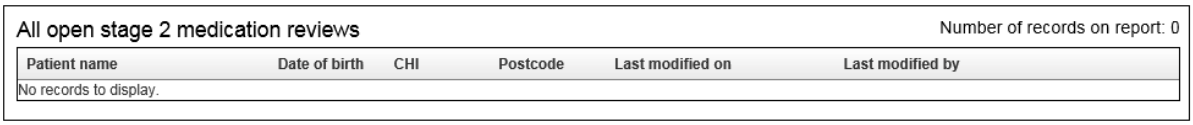
- Patient name
  - Core service indicator icon (if applicable)
- Date of birth
- CHI
- Postcode
- Last modified on (Default sort: ascending)
- Last Modified by
- Status

View Link

Links to “Stage 2 medication review summary” page.

12.8.2 All open stage 2 medication reviews

Report Layout


All open stage 2 medication reviews

Number of records on report: 0

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by
No records to display.					

return to Reports Page

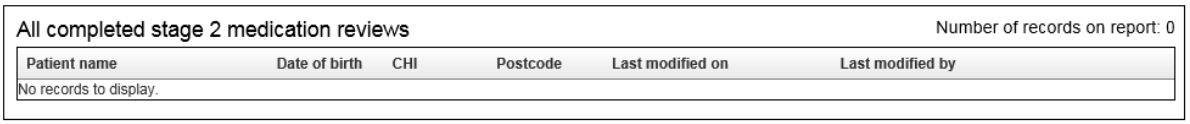
Report Columns

- Patient name
- Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default sort: ascending)
- Last Modified by
- Status

“View” Link

Links to “Stage 2 medication review summary” page.

12.8.3 All completed stage 2 medication reviews


All completed stage 2 medication reviews

Number of records on report: 0

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by
No records to display.					

return to Reports Page

Report Columns

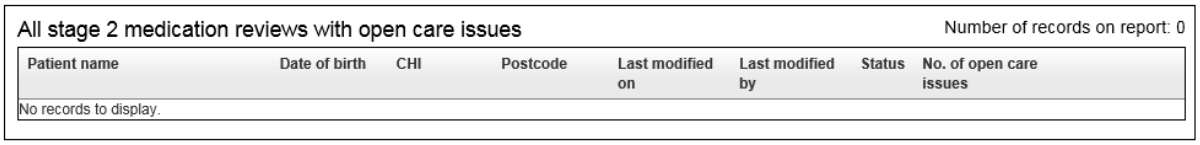
- Patient name
- Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort, Ascending)
- Last Modified by
- Status

“View” Link

Links to “Stage 2 medication review summary” Page.

12.8.4 All stage 2 medication reviews with open care issues

This report will display all open care issues associated with a stage 2 medication review that was created using the one-click care issue creation function on the stage 2 medication review summary page.


All stage 2 medication reviews with open care issues

Number of records on report: 0

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status	No. of open care issues
No records to display.							

return to Reports Page

Report Columns

- Patient name
- Core service indicator icon (If applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort: ascending)
- Last Modified by
- Status
- No. of open care issues

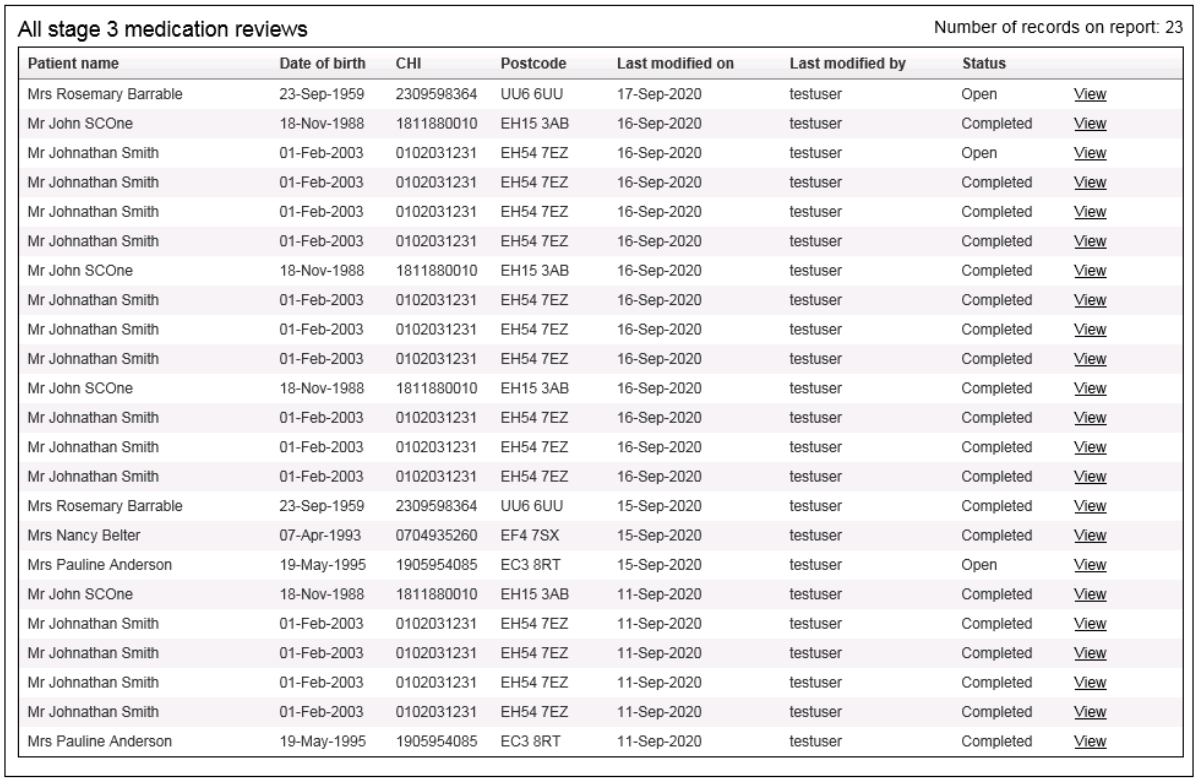
“View” Link

Links to “Stage 2 medication review summary” Page.

12.9 Stage 3 medication review reports

12.9.1 All stage 3 medication reviews

Report layout



All stage 3 medication reviews — Number of records on report: 23

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status	
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	17-Sep-2020	testuser	Open	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Open	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	View
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	15-Sep-2020	testuser	Completed	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	Completed	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	15-Sep-2020	testuser	Open	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	Completed	View

return to Reports Page

Report Columns

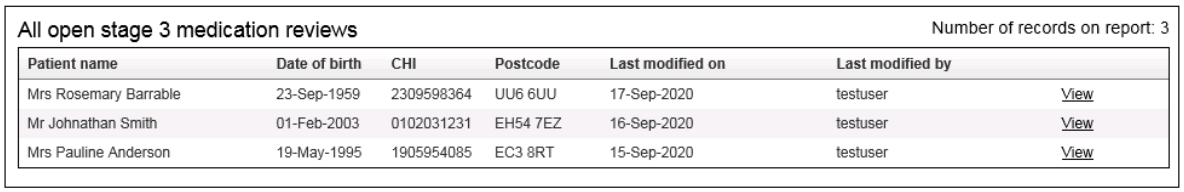
- Patient name
  - Core service indicator icon (if applicable)
- Date of birth
- CHI
- Postcode
- Last modified on (Default sort: ascending)
- Last Modified by
- Status

View Link

Links to “Stage 3 medication review summary” page.

12.9.2 All open stage 3 medication reviews

Report Layout



All open stage 3 medication reviews — Number of records on report: 3

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	17-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	15-Sep-2020	testuser	View

return to Reports Page

Report Columns

- Patient name
- Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default sort: ascending)
- Last Modified by
- Status

“View” Link

Links to “Stage 3 medication review summary” page.

12.9.3 All completed stage 3 medication reviews

All completed stage 3 medication reviews — Number of records on report: 20

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	View
Mrs Rosemary Barrable	23-Sep-1959	2309598364	UU6 6UU	15-Sep-2020	testuser	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	View

return to Reports Page

Report Columns

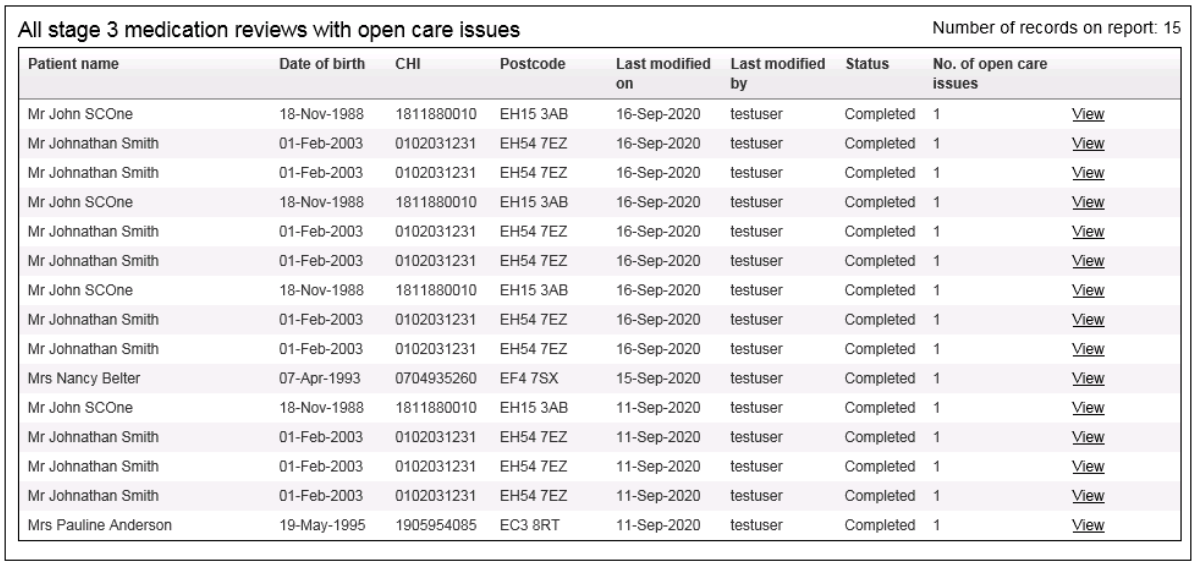
- Patient name
- Core service indicator icon (if applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort, Ascending)
- Last Modified by
- Status

“View” Link

Links to “Stage 3 medication review summary” Page.

12.9.4 All stage 3 medication reviews with open care issues

This report will display all open care issues associated with a stage 3 medication review.



All stage 3 medication reviews with open care issues — Number of records on report: 15

Patient name	Date of birth	CHI	Postcode	Last modified on	Last modified by	Status	No. of open care issues	
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	16-Sep-2020	testuser	Completed	1	View
Mrs Nancy Belter	07-Apr-1993	0704935260	EF4 7SX	15-Sep-2020	testuser	Completed	1	View
Mr John SCOne	18-Nov-1988	1811880010	EH15 3AB	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mr Johnathan Smith	01-Feb-2003	0102031231	EH54 7EZ	11-Sep-2020	testuser	Completed	1	View
Mrs Pauline Anderson	19-May-1995	1905954085	EC3 8RT	11-Sep-2020	testuser	Completed	1	View

return to Reports Page

Report Columns

- Patient name
- Core service indicator icon (If applicable)
- Date of birth
- Postcode
- CHI
- Last modified on (Default Sort: ascending)
- Last Modified by
- Status
- No. of open care issues

“View” Link

Links to “Stage 3 medication review summary” Page.

12.10 New Medicine intervention reports

12.10.1 Overview

The following reports support the new medicine interventions support tool

- All new medicine interventions for the pharmacy
- All open new medicine interventions
- Follow ups scheduled up to TODAY
- Follow ups scheduled up to 7 days from today
- Follow ups scheduled up to 14 days from today
- Follow ups scheduled up to 28 days from today
- Open new medicine interventions without any follow ups
- Completed new medicine interventions

Each of the new medicine intervention report links show, as a summary, the number of records that will be included on the report. This patient count shown in square brackets can be used as an alert to the number of patients that match the criteria in the report title.

Note: *Reports that are specific to follow up interventions will only return follow up interventions not yet marked as complete.*

12.10.2 Reports

New medicine reports lings on main reports page:

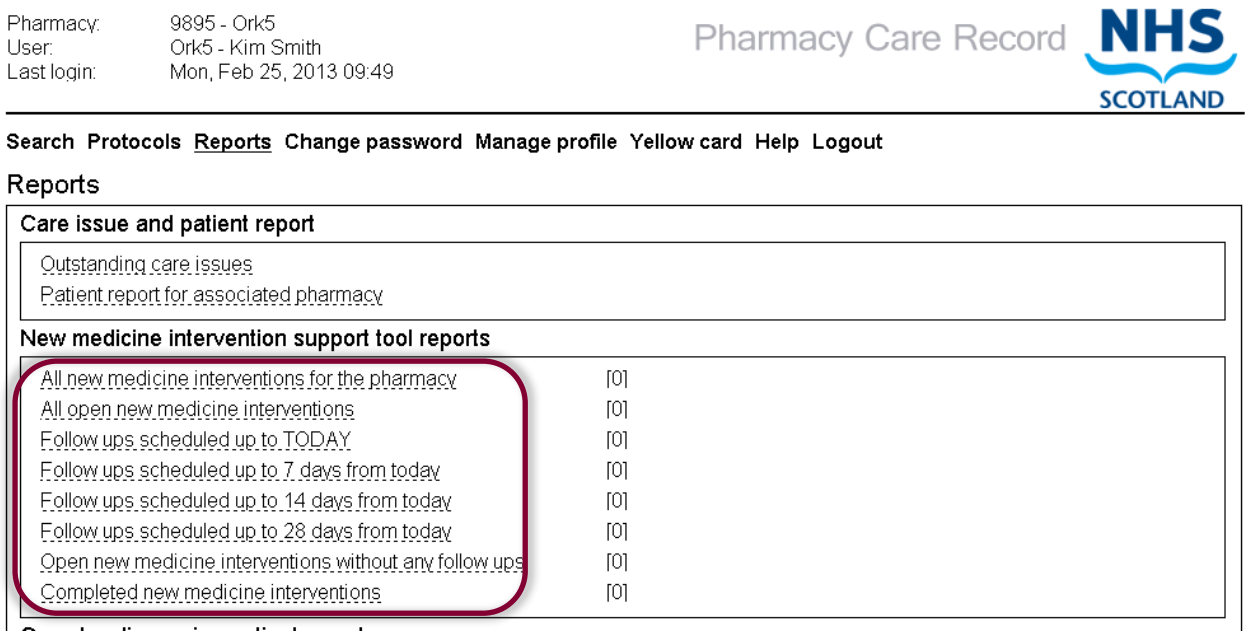


Figure 12-17: New medicine intervention support tool report links

To run any new medicine intervention support tool report:

- Select the report link (Figure 12-17)
- The report is displayed (Figure 12-18 and

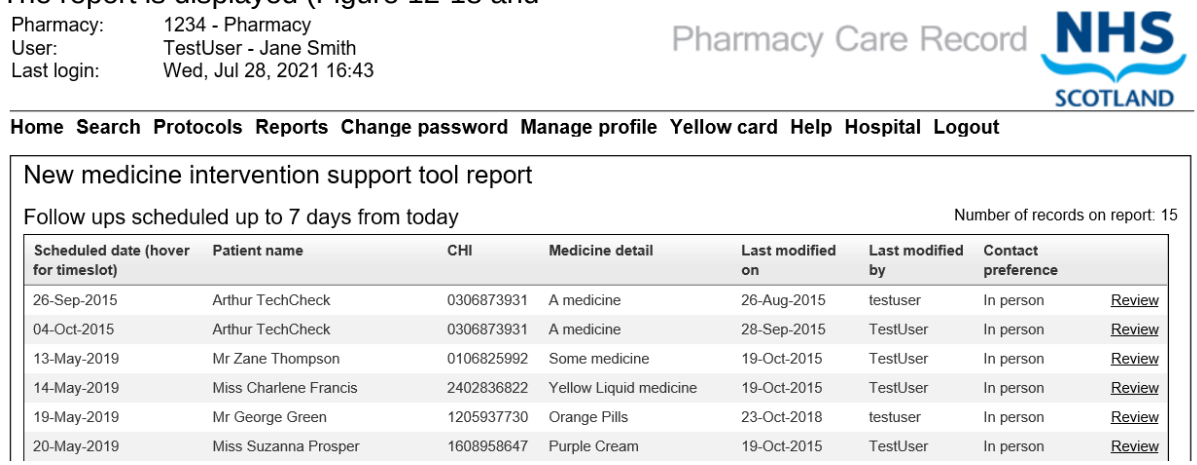
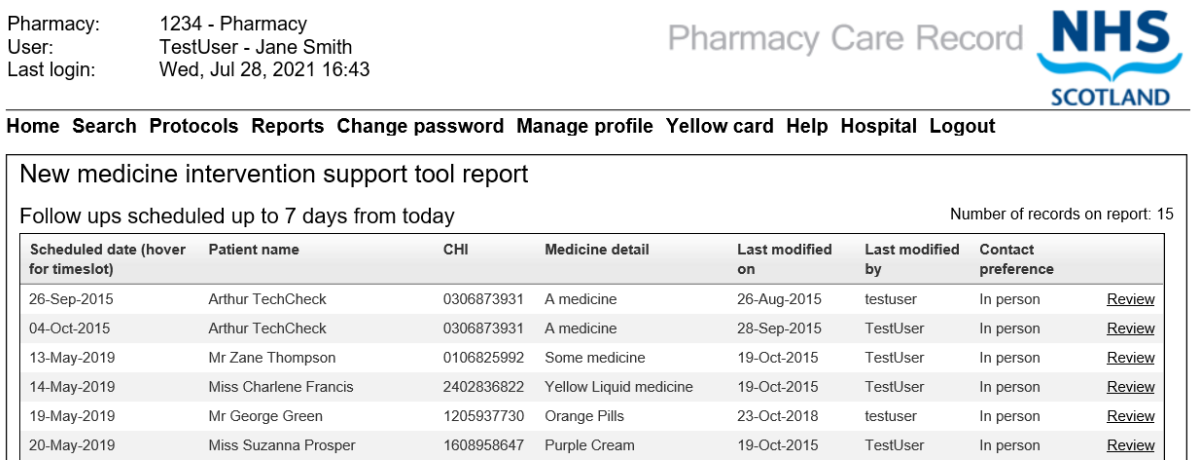


Figure 12-19 as examples)



Pharmacy: 1234 - Pharmacy
User: TestUser - Jane Smith
Last login: Wed, Jul 28, 2021 16:43

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Home Search Protocols Reports Change password Manage profile Yellow card Help Hospital Logout

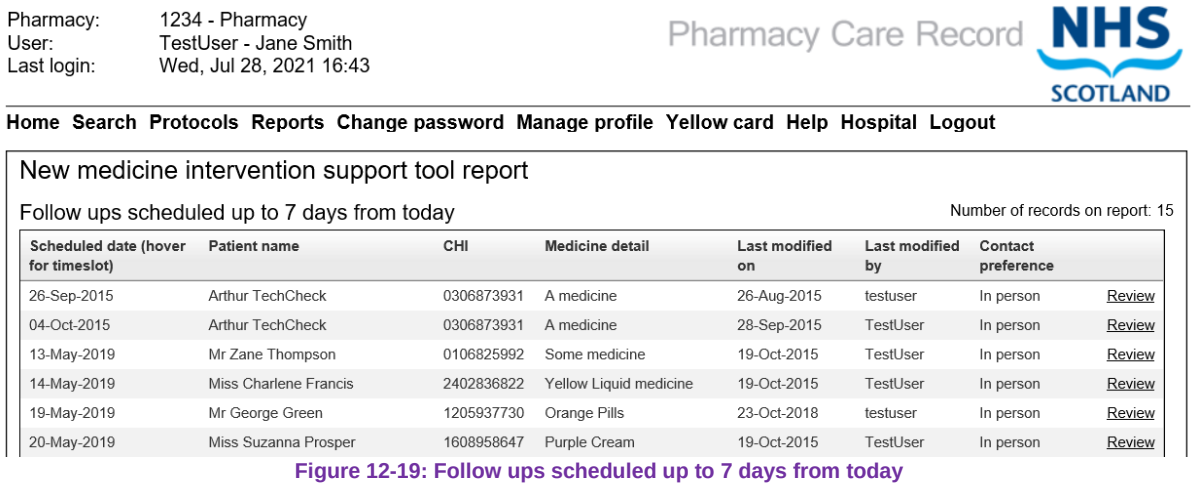
New medicine intervention support tool report

Follow ups scheduled up to 7 days from today

Number of records on report: 15

Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
26-Sep-2015	Arthur TechCheck	0306873931	A medicine	26-Aug-2015	testuser	In person	Review
04-Oct-2015	Arthur TechCheck	0306873931	A medicine	28-Sep-2015	TestUser	In person	Review
13-May-2019	Mr Zane Thompson	0106825992	Some medicine	19-Oct-2015	TestUser	In person	Review
14-May-2019	Miss Charlene Francis	2402836822	Yellow Liquid medicine	19-Oct-2015	TestUser	In person	Review
19-May-2019	Mr George Green	1205937730	Orange Pills	23-Oct-2018	testuser	In person	Review
20-May-2019	Miss Suzanna Prosper	1608958647	Purple Cream	19-Oct-2015	TestUser	In person	Review

Figure 12-18: All new medicine interventions report



Pharmacy: 1234 - Pharmacy
User: TestUser - Jane Smith
Last login: Wed, Jul 28, 2021 16:43

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New medicine intervention support tool report

Follow ups scheduled up to 7 days from today

Number of records on report: 15

Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
26-Sep-2015	Arthur TechCheck	0306873931	A medicine	26-Aug-2015	testuser	In person	Review
04-Oct-2015	Arthur TechCheck	0306873931	A medicine	28-Sep-2015	TestUser	In person	Review
13-May-2019	Mr Zane Thompson	0106825992	Some medicine	19-Oct-2015	TestUser	In person	Review
14-May-2019	Miss Charlene Francis	2402836822	Yellow Liquid medicine	19-Oct-2015	TestUser	In person	Review
19-May-2019	Mr George Green	1205937730	Orange Pills	23-Oct-2018	testuser	In person	Review
20-May-2019	Miss Suzanna Prosper	1608958647	Purple Cream	19-Oct-2015	TestUser	In person	Review

Figure 12-19: Follow ups scheduled up to 7 days from today

Report Data

Report Name	Report Columns
All new medicine interventions for the pharmacy	Patient Name Core service indicator icon CHI Medicine detail

All open new medicine interventions report Open new medicine interventions without any follow ups Completed new medicine interventions	Last modified on Last modified by Status Review page link
Follow ups scheduled up to TODAY Follow ups scheduled up to 7 days from today Follow ups scheduled up to 14 days from today Follow ups scheduled up to 28 days from today	Scheduled date (hover for timeslot) Patient name Core service indicator icon CHI Medicine detail Last modified on Last modified by Contact preference (By Telephone or In Person) Review page link

Note: *All new medicine intervention reports display a count of the number of records returned.*

12.11 Gluten-free reports

12.11.1 Overview

Gluten-free reports are accessed from a link on the Reports Page, Figure 12-2.

The following reports are available:

- Diagnosed coeliac patients (historical)
- Following a gluten-free diet
- All gluten-free foods annual health checks
- All incomplete (no annual review date set) gluten-free foods annual health checks
- All completed gluten-free foods annual health checks
- Annual health checks scheduled within 7 days from today
- Annual health checks scheduled within 14 days from today
- Annual health checks scheduled within 28 days from today
- Annual health check not completed in pharmacy
- Annual health checks that are overdue
- Following a gluten-free diet and annual health check never completed

To view a Gluten-free report:

- Select link from the Reports page
- The report detail will be displayed, (Figure 12-20 ,as example)

Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

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Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Following a gluten-free diet — Number of records on report: 20

Patient name	Date of birth	CHI	Post code	Gluten-free diet	Last review completed	Next review	
Miss Juliet Balcony	31-Aug-1995	3108953362	EG35 7UN	Diagnosed coeliac and Dermatitis Herpetiformis	20-Oct-2015	25-Mar-2016	View
Eight Eight	03-Jun-1995	0808081233	AA1 1AA	Undiagnosed	26-Apr-2017	26-Apr-2018	View
Mr Simon Pharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	Never	Not specified	View
Mr Lance Fish	21-Mar-1971	2103718631	ER3 6HH	Diagnosed coeliac	20-Oct-2015	Not specified	View
Mr Henry Fisher	01-Jan-1988	0101884052	ER5 8LP	Diagnosed coeliac	24-Apr-2017	24-Apr-2018	View
Four Four	04-Apr-2004	0404041248		Undiagnosed	26-Apr-2017	26-Mar-2018	View
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	Never	30-Apr-2017	View
Mr Charles Grund	13-Jul-1982	1307822533	EG23 9AR	Undiagnosed	20-Oct-2015	22-Mar-2016	View
Mr Kevin Gryphon	19-Jun-1959	1906597197	EH37 8SD	Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	View
Miss Julie Harford	19-Mar-1987	1903877989	EH63 9WX	Diagnosed coeliac	20-Oct-2015	23-Mar-2016	View
Miss Lorna Mouse	19-Apr-1981	1904810527	EE23 6HP	Diagnosed coeliac and Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	View
One One	03-Jun-1987	0101011237	AA1 1AA	Diagnosed coeliac and Dermatitis Herpetiformis	26-Apr-2017	26-Apr-2018	View
Mr Chris Starling	23-Oct-1971	2310713899	ED72 9UD	Dermatitis Herpetiformis	20-Oct-2015	24-Mar-2016	View
Mr Bernard Stirring	03-May-1993	0305938371	EF3 7HU	Undiagnosed	Never	22-Mar-2016	View
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	Never	23-Mar-2016	View
judy one tester	04-Jul-1963	0407634444		Diagnosed coeliac	24-Apr-2017	26-Apr-2017	View
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	Never	Not specified	View
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	Never	Not specified	View
TwentySeven TwentySeven	27-Feb-1970	2702701248		Undiagnosed	26-Apr-2017	26-Apr-2018	View
Two Two	02-Feb-2002	0202021238		Dermatitis Herpetiformis	26-Apr-2017	31-Mar-2018	View

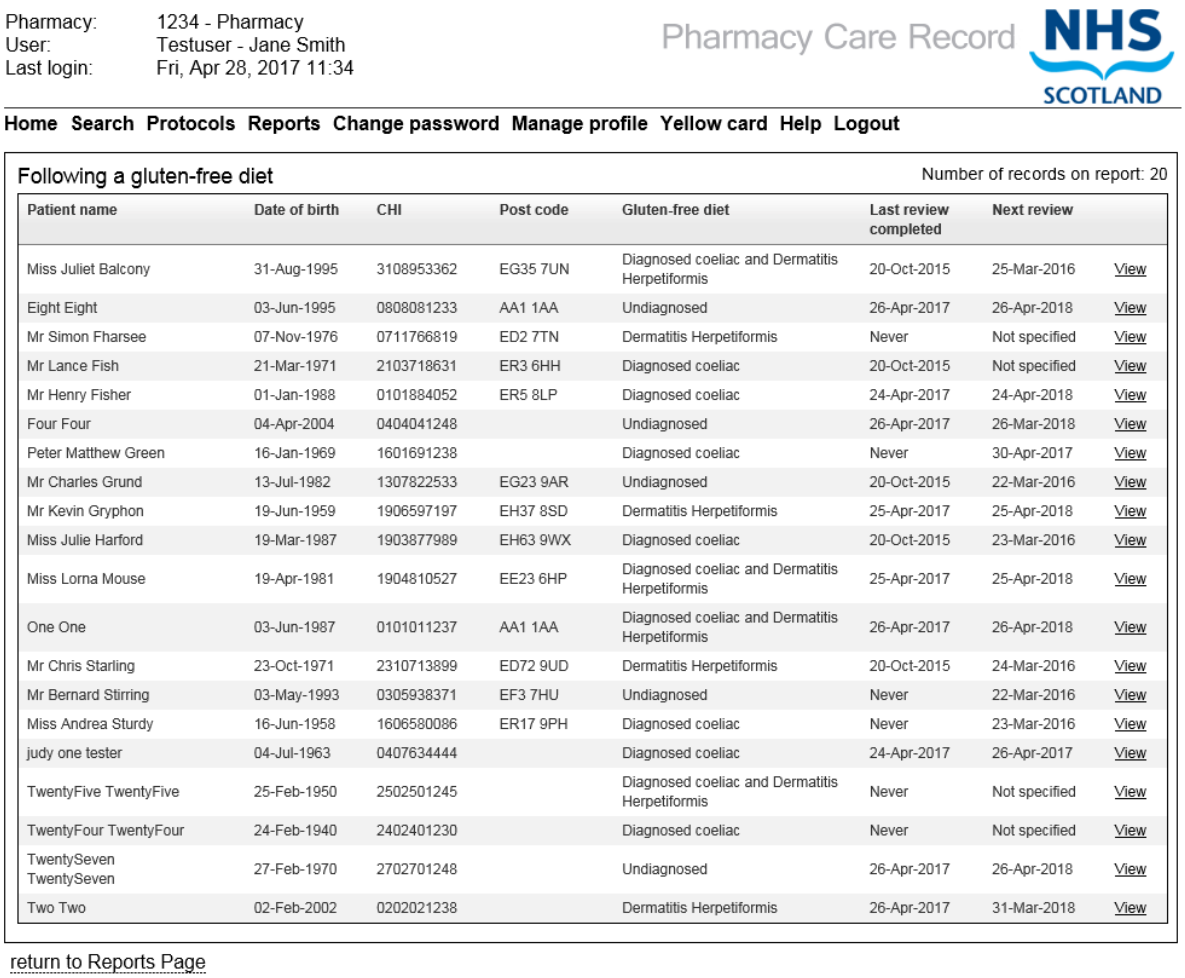
return to Reports Page

Figure 12-20: example gluten-free report

A count of the number of records in the report is also displayed.

A “return to Reports Page” link is shown below the report.

12.11.2 Following a gluten free diet



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

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Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Following a gluten-free diet — Number of records on report: 20

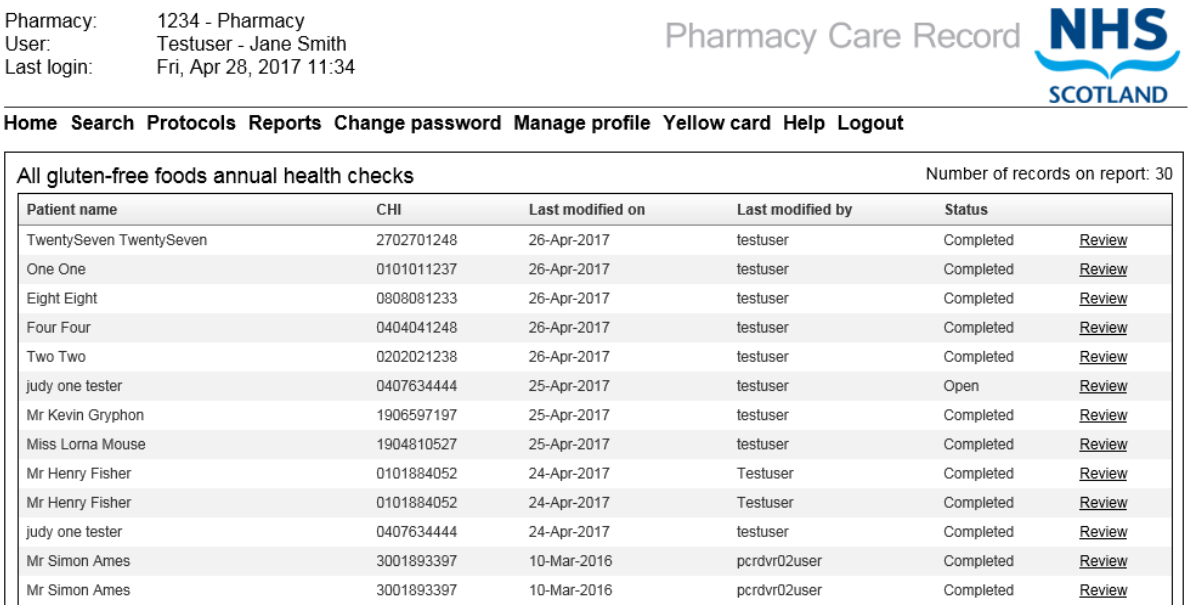
Patient name	Date of birth	CHI	Post code	Gluten-free diet	Last review completed	Next review	
Miss Juliet Balcony	31-Aug-1995	3108953362	EG35 7UN	Diagnosed coeliac and Dermatitis Herpetiformis	20-Oct-2015	25-Mar-2016	View
Eight Eight	03-Jun-1995	0808081233	AA1 1AA	Undiagnosed	26-Apr-2017	26-Apr-2018	View
Mr Simon Fharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	Never	Not specified	View
Mr Lance Fish	21-Mar-1971	2103718631	ER3 6HH	Diagnosed coeliac	20-Oct-2015	Not specified	View
Mr Henry Fisher	01-Jan-1988	0101884052	ER5 8LP	Diagnosed coeliac	24-Apr-2017	24-Apr-2018	View
Four Four	04-Apr-2004	0404041248		Undiagnosed	26-Apr-2017	26-Mar-2018	View
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	Never	30-Apr-2017	View
Mr Charles Grund	13-Jul-1982	1307822533	EG23 9AR	Undiagnosed	20-Oct-2015	22-Mar-2016	View
Mr Kevin Gryphon	19-Jun-1959	1906597197	EH37 8SD	Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	View
Miss Julie Harford	19-Mar-1987	1903877989	EH63 9WX	Diagnosed coeliac	20-Oct-2015	23-Mar-2016	View
Miss Lorna Mouse	19-Apr-1981	1904810527	EE23 6HP	Diagnosed coeliac and Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	View
One One	03-Jun-1987	0101011237	AA1 1AA	Diagnosed coeliac and Dermatitis Herpetiformis	26-Apr-2017	26-Apr-2018	View
Mr Chris Starling	23-Oct-1971	2310713899	ED72 9UD	Dermatitis Herpetiformis	20-Oct-2015	24-Mar-2016	View
Mr Bernard Stirring	03-May-1993	0305938371	EF3 7HU	Undiagnosed	Never	22-Mar-2016	View
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	Never	23-Mar-2016	View
judy one tester	04-Jul-1963	0407634444		Diagnosed coeliac	24-Apr-2017	26-Apr-2017	View
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	Never	Not specified	View
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	Never	Not specified	View
TwentySeven TwentySeven	27-Feb-1970	2702701248		Undiagnosed	26-Apr-2017	26-Apr-2018	View
Two Two	02-Feb-2002	0202021238		Dermatitis Herpetiformis	26-Apr-2017	31-Mar-2018	View

return to Reports Page

Report columns:

- Patient name
- Date of birth
- Post code
- Gluten-free diet
- Last review completed
- Next review
- View (Link to patient home)

12.11.3 All gluten-free foods annual health checks



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

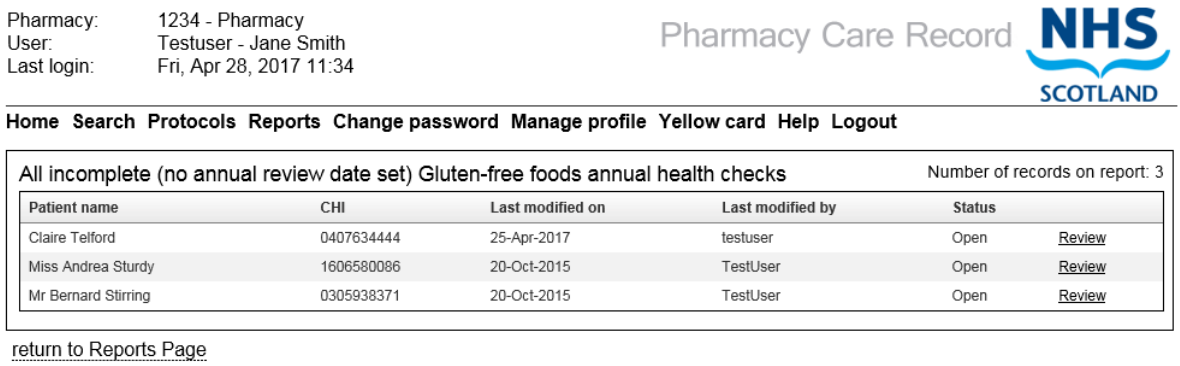
All gluten-free foods annual health checks — Number of records on report: 30

Patient name	CHI	Last modified on	Last modified by	Status	
TwentySeven TwentySeven	2702701248	26-Apr-2017	testuser	Completed	Review
One One	0101011237	26-Apr-2017	testuser	Completed	Review
Eight Eight	0808081233	26-Apr-2017	testuser	Completed	Review
Four Four	0404041248	26-Apr-2017	testuser	Completed	Review
Two Two	0202021238	26-Apr-2017	testuser	Completed	Review
judy one tester	0407634444	25-Apr-2017	testuser	Open	Review
Mr Kevin Gryphon	1906597197	25-Apr-2017	testuser	Completed	Review
Miss Lorna Mouse	1904810527	25-Apr-2017	testuser	Completed	Review
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	Review
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	Review
judy one tester	0407634444	24-Apr-2017	testuser	Completed	Review
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	Review
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	Review

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

12.11.4 All incomplete (no annual review date set) gluten-free foods annual health checks


Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

All incomplete (no annual review date set) Gluten-free foods annual health checks — Number of records on report: 3

Patient name	CHI	Last modified on	Last modified by	Status	
Claire Telford	0407634444	25-Apr-2017	testuser	Open	Review
Miss Andrea Sturdy	1606580086	20-Oct-2015	TestUser	Open	Review
Mr Bernard Stirring	0305938371	20-Oct-2015	TestUser	Open	Review

return to Reports Page

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

12.11.5 All completed gluten-free foods annual health checks

Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

All completed gluten-free foods annual health checks — Number of records on report: 23

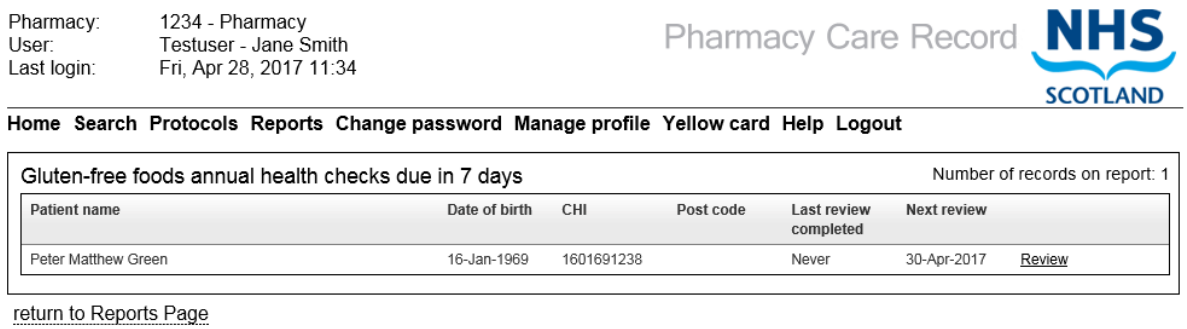
Patient name	CHI	Last modified on	Last modified by	Status	
TwentySeven TwentySeven	2702701248	26-Apr-2017	testuser	Completed	Review
One One	0101011237	26-Apr-2017	testuser	Completed	Review
Eight Eight	0808081233	26-Apr-2017	testuser	Completed	Review
Four Four	0404041248	26-Apr-2017	testuser	Completed	Review
Two Two	0202021238	26-Apr-2017	testuser	Completed	Review
Mr Kevin Gryphon	1906597197	25-Apr-2017	testuser	Completed	Review
Miss Lorna Mouse	1904810527	25-Apr-2017	testuser	Completed	Review
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	Review
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	Review
Claire Telford	0407634444	24-Apr-2017	testuser	Completed	Review
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	Review
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	Review
Mr Simon Ames	3001893397	09-Mar-2016	technicianuser	Completed	Review
Mr Simon Ames	3001893397	09-Mar-2016	technicianuser	Completed	Review
Mr Phear Allenadale	1310812616	21-Jan-2016	TestUser	Completed	Review
Miss Juliet Balcony	3108953362	20-Oct-2015	TestUser	Completed	Review
Mr Chris Starling	2310713899	20-Oct-2015	TestUser	Completed	Review
Miss Julie Harford	1903877989	20-Oct-2015	TestUser	Completed	Review
Mr Charles Grund	1307822533	20-Oct-2015	TestUser	Completed	Review
Mrs Fiona Brandt	1905980949	20-Oct-2015	TestUser	Completed	Review
Mr Lance Fish	2103718631	20-Oct-2015	TestUser	Completed	Review
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Completed	Review
Mr Jasper Linklater	0805921753	27-Feb-2015	TestUser	Completed	Review

return to Reports Page

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

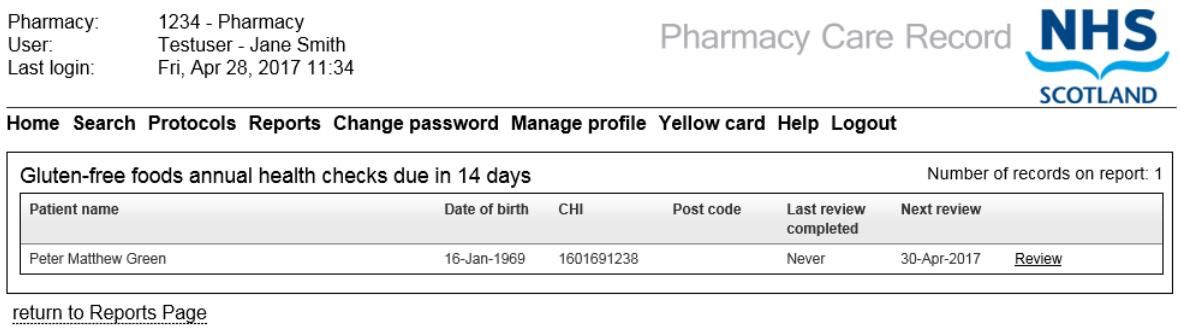
12.11.6 Annual health checks scheduled within 7 days from today



Report columns:

- Patient name
- Date of birth
- CHI
- Post code
- Last review completed
- Next Review
- Review (Link to patient home)

12.11.7 Annual health checks scheduled within 14 days from today


Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

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Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Gluten-free foods annual health checks due in 14 days — Number of records on report: 1

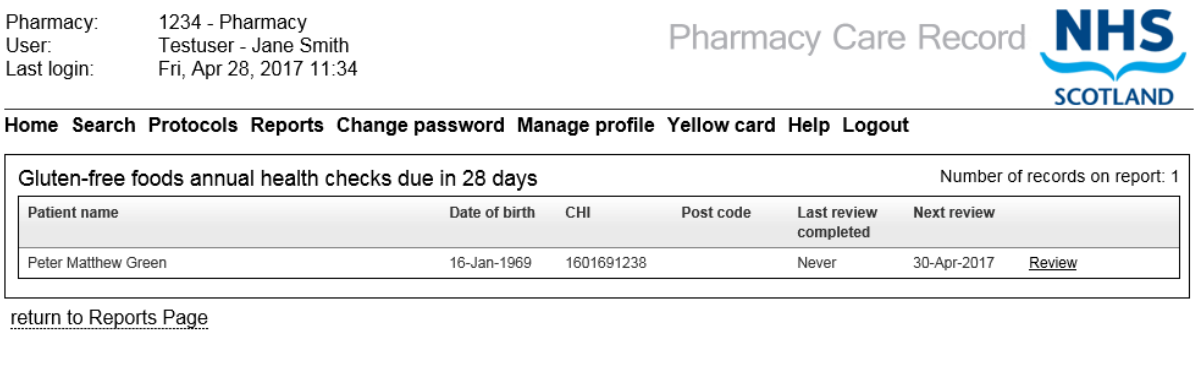
Patient name	Date of birth	CHI	Post code	Last review completed	Next review	
Peter Matthew Green	16-Jan-1969	1601691238		Never	30-Apr-2017	Review

return to Reports Page

Report columns:

- Patient name
- Date of birth
- CHI
- Post code
- Last review completed
- Next Review
- Review (Link to patient home)

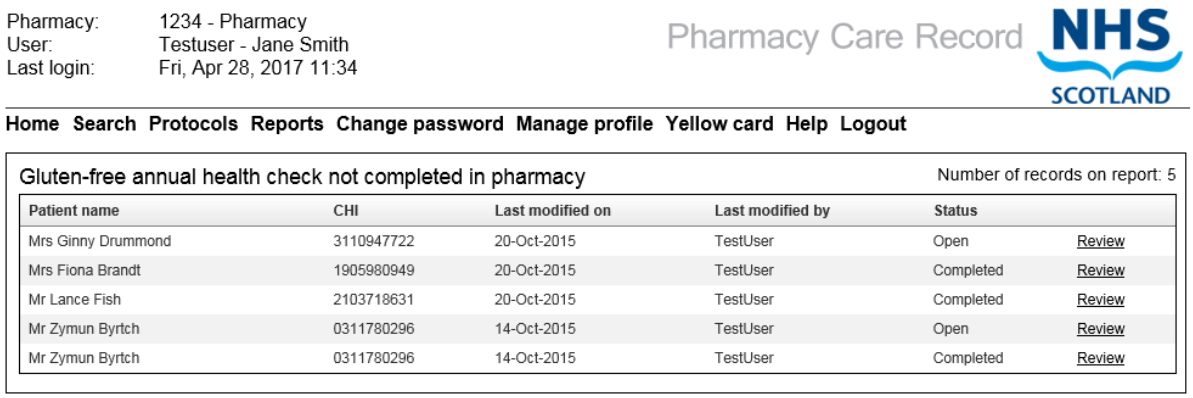
12.11.8 Annual health checks scheduled within 28 days from today



Report columns:

- Patient name
- Date of birth
- CHI
- Postcode
- Last review completed
- Next Review
- Review (Link to patient home)

12.11.9 Annual health check not completed in pharmacy


Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Gluten-free annual health check not completed in pharmacy — Number of records on report: 5

Patient name	CHI	Last modified on	Last modified by	Status	
Mrs Ginny Drummond	3110947722	20-Oct-2015	TestUser	Open	Review
Mrs Fiona Brandt	1905980949	20-Oct-2015	TestUser	Completed	Review
Mr Lance Fish	2103718631	20-Oct-2015	TestUser	Completed	Review
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Open	Review
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Completed	Review

return to Reports Page

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status (Open, Completed, or “None”)
- Review (Link to patient home)

12.11.10 Annual health checks that are overdue

Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Gluten-free foods annual health checks overdue — Number of records on report: 10

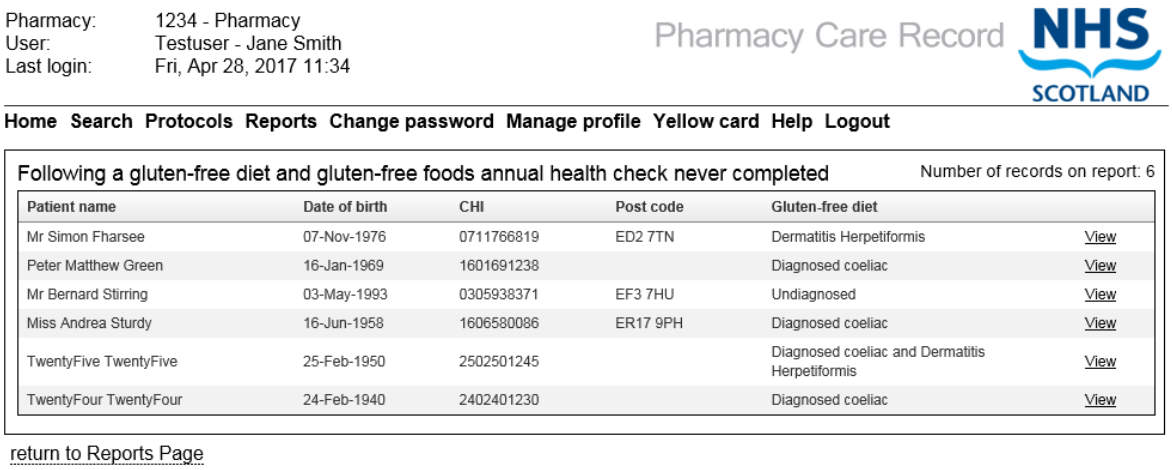
Patient name	CHI	Annual health check date	Last modified on	Last modified by	Status	
Claire Telford	0407634444	26-Apr-2017	25-Apr-2017	testuser	Open	Review
Mr Phear Allenadale	1310812616	23-Jan-2017	21-Jan-2016	TestUser	Open	Review
Mr Simon Ames	3001893397	07-Apr-2016	10-Mar-2016	pcrdvr02user	Completed	Review
Miss Juliet Balcony	3108953362	25-Mar-2016	20-Oct-2015	TestUser	Completed	Review
Mr Chris Starling	2310713899	24-Mar-2016	20-Oct-2015	TestUser	Completed	Review
Miss Julie Harford	1903877989	23-Mar-2016	20-Oct-2015	TestUser	Completed	Review
Miss Andrea Sturdy	1606580086	23-Mar-2016	20-Oct-2015	TestUser	Open	Review
Mr Charles Grund	1307822533	22-Mar-2016	20-Oct-2015	TestUser	Completed	Review
Mr Bernard Stirring	0305938371	22-Mar-2016	20-Oct-2015	TestUser	Open	Review
Mr Jasper Linklater	0805921753	27-Feb-2016	22-Jan-2016	TestUser	Open	Review

return to Reports Page

Report columns:

- Patient name
- CHI
- Annual health check date
- Last modified on
- Last modified by
- Status
- Review (Link to patient home)

12.11.11 Following a gluten-free diet and annual health check never completed



Pharmacy: 1234 - Pharmacy
User: Testuser - Jane Smith
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record NHS SCOTLAND

Home Search Protocols Reports Change password Manage profile Yellow card Help Logout

Following a gluten-free diet and gluten-free foods annual health check never completed — Number of records on report: 6

Patient name	Date of birth	CHI	Post code	Gluten-free diet	
Mr Simon Fharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	View
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	View
Mr Bernard Stirring	03-May-1993	0305938371	EF3 7HU	Undiagnosed	View
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	View
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	View
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	View

return to Reports Page

Report columns:

- Patient name
- Date of birth
- CHI
- Postcode
- Gluten-free diet
- View (Link to patient home)

12.12 High risk medicine assessments reports

There are three High risk medicine assessments support tool reports that can be accessed from a link on the Reports Page, Figure 12-2.

- All high risk medicine assessments for the pharmacy
- All open high risk medicine assessments
- All completed high risk medicine assessments

To display a high risk medicine assessments support tool report:

- Select the link from the reports page, Figure 12-2.
- The report detail will be displayed, Figure 12-21 (Example shown “All”)

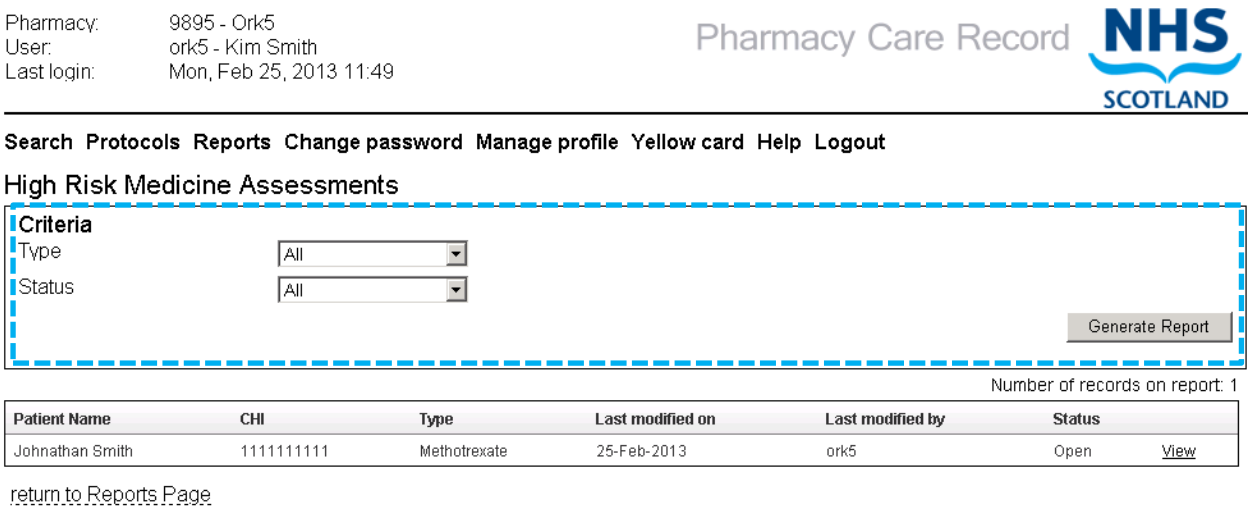


Figure 12-21: All High Risk Medicine Assessments as example

All high risk medicine assessments reports display the following information:

- Patient Name
- Core service indicator icon
- CHI
- Type (of Medication)
- Last modified on
- Last modified by
- Status
- “View” link to navigate to the High Risk Medicine Assessment summary
- Return to Reports Page link
- A count of the number of records in the report
- Filter criteria

Additional filter criteria can be applied to the report. The report can be filtered by:

- Type (All, Methotrexate, Lithium, Warfarin)
- Status (Open, Completed)

To apply a filter:

- Select the desired filter criteria from the dropdown menus Type, Status (or both)
- Select the “Generate Report” button
- The report will be generated with the filter criteria applied.

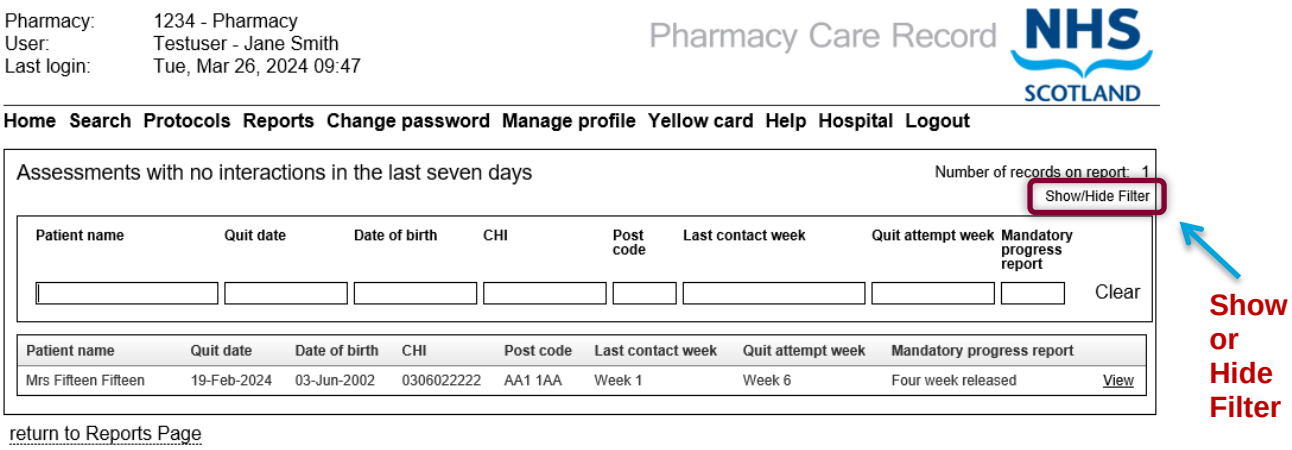
12.13 Smoking Cessation support tool assessment reports

12.13.1 Report Filter for smoking cessation reports

All smoking cessation reports have the same filter capability.

To Show/Hide the filter:

- Select “Show/Hide Filter” to toggle the report filter, shown in the example below. This will toggle on or off the display of the filter.



To use the filter:

- Enter search criteria in any the filter text boxes that correspond with the report columns. The filter will be applied as you type.

Select “Clear” to remove filter criteria you have typed.

The filter criteria you type applies to any part of the data you are wanting to filter. For example, to filter all quit dates in April, enter “Apr” into the quit date filter box.

12.13.2 All Open smoking cessation assessments for the pharmacy

Report Overview

The “All Open smoking cessation assessments for the pharmacy” lists all smoking cessation assessments that have a PCR status of “Open”. This is independent of the mandatory progress report Status.

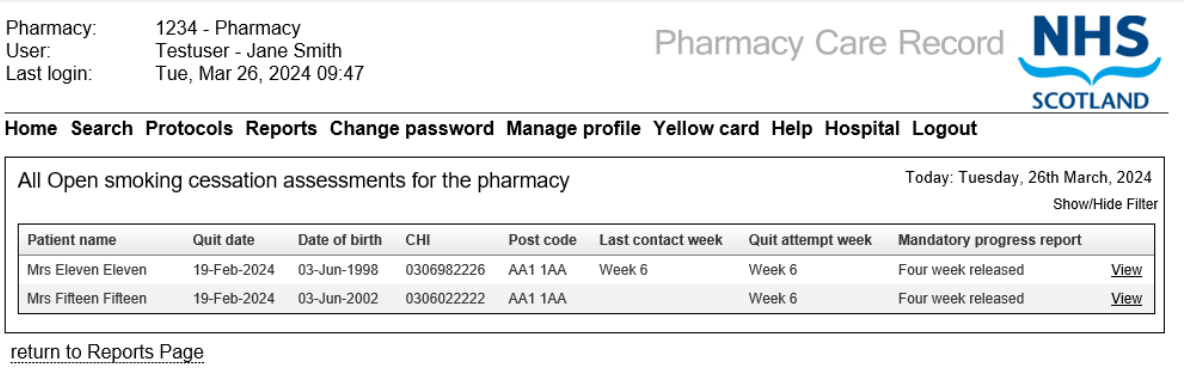


Figure 12-22: All open

Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Last contact week
- Quit attempt week
- Mandatory progress report (Status)

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

12.13.3 All Completed smoking cessation assessments for the pharmacy

The “All Completed smoking cessation assessments for the pharmacy” lists all smoking cessation assessments that have been completed using the assessment completion function in PCR. This is independent of the mandatory progress report Status.

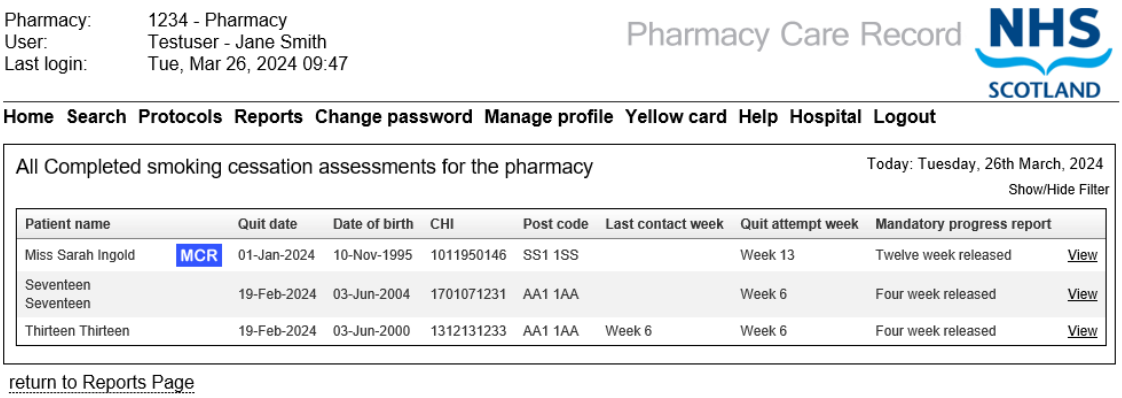


Figure 12-23: All Completed smoking cessation assessments

Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Last contact week
- Quit attempt week
- Mandatory Progress report

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

12.13.4 Assessments with no interactions in the last seven days

The report is intended to help the pharmacist keep track of patients that have not been in regular contact with the pharmacy.

This report highlights where there has been no contact in the last 7 days (or more). It is cumulative – once an assessment appears on the report it will stay there until a contact is recorded.

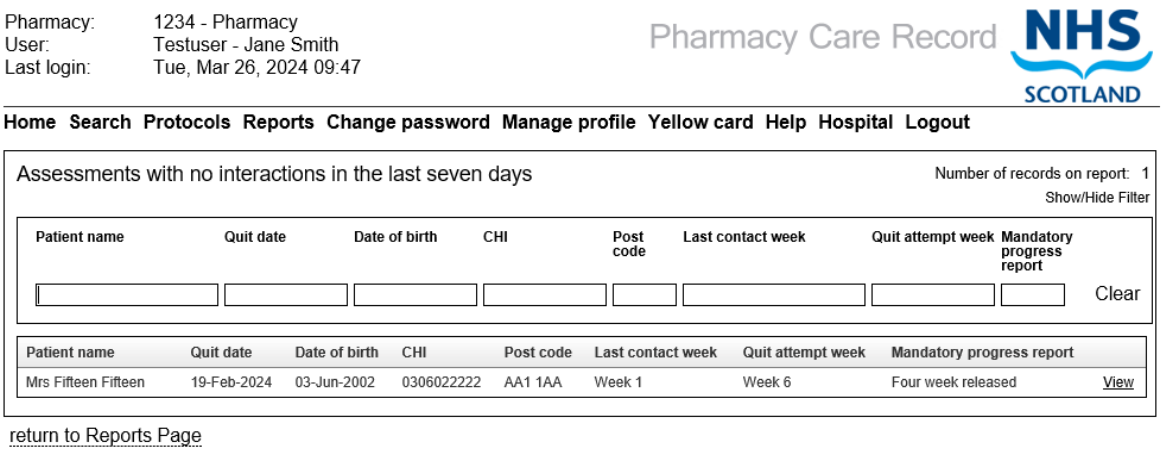


Figure 12-24

Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Last contact week
- Quit attempt week
- Mandatory Progress report (Status)

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

12.13.5 Assessments awaiting four or twelve week follow up

This report assists with keeping track of smoking cessation assessments that are within their next mandatory progress report submission window. It will show all open smoking cessation assessment where:

- The next step is 4 week mandatory progress report submission and are in the 4-6 week submission window
- The next step is 12 week mandatory progress report submission and are in the 10-14 week submission window

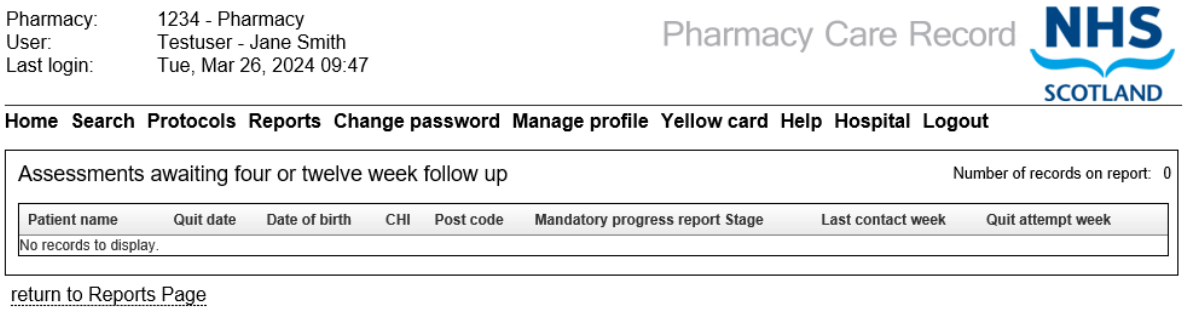


Figure 12-25: Smoking cessation assessments awaiting four or twelve week follow up

Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Mandatory progress report Stage
- Last contact week
- Quit attempt week

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

12.13.6 Assessments with no quit date set

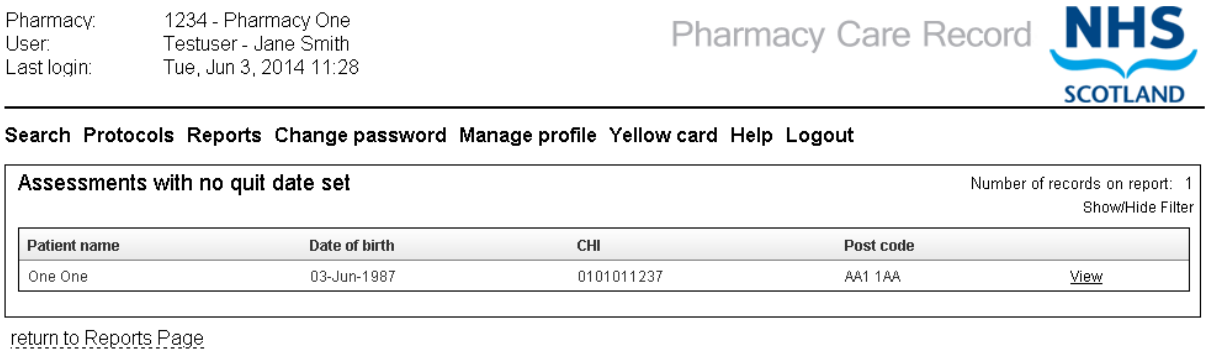


Figure 12-26: Assessments with no quit date set

Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Postcode

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

12.13.7 Assessments with mandatory progress report submissions expiring in the next seven days

This report assists with managing assessment that are nearing their mandatory progress report submission deadline. It is intended to help ensure submissions are not missed.

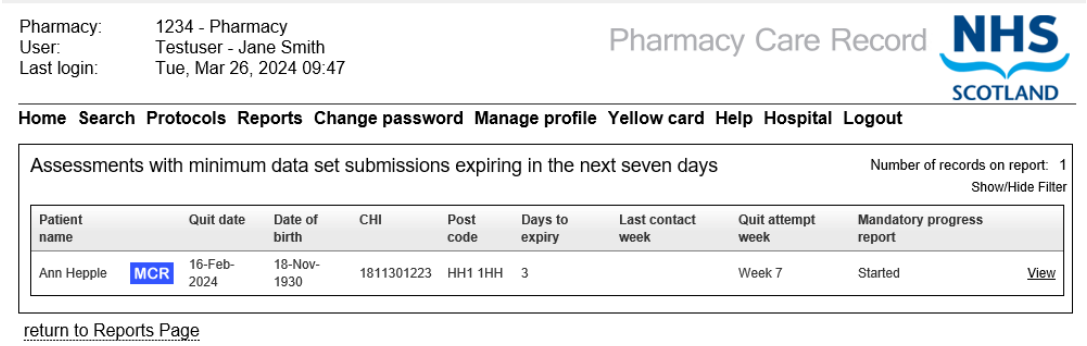


Figure 12-27

Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Days to expiry
- Last contact week
- Quit attempt week
- Mandatory progress report

“View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

13 PMR interface to PCR

13.1 Overview

PMR applications have the ability to interface with PCR. Full details of the interface functionality are detailed in your PMR User Manual.

There are two specific interfaces:

- Patient interface and
- Medication history transfer

These interfaces are designed to prevent the re-keying of patient demographic data and medication dispensing history that is already present in your PMR system.

The PMR interface to PCR may only be available for patients who are registered for MCR. Links to PCR functions are therefore usually found on the Patient's MCR Registration Status / History details within the PMR.

Note: Using the Patient interface is the only way to keep the patient demographics held on the PCR consistent with those you have entered / updated on your PMR.

Figure 13-1 shows the link to PCR from the Cegedim RX Pharmacy Manager PMR. There are two buttons that are specific to PCR:

- 'Open PCR' which is the patient level interface and
- 'Export PCR History' which is used for the medication history transfer for a patient.

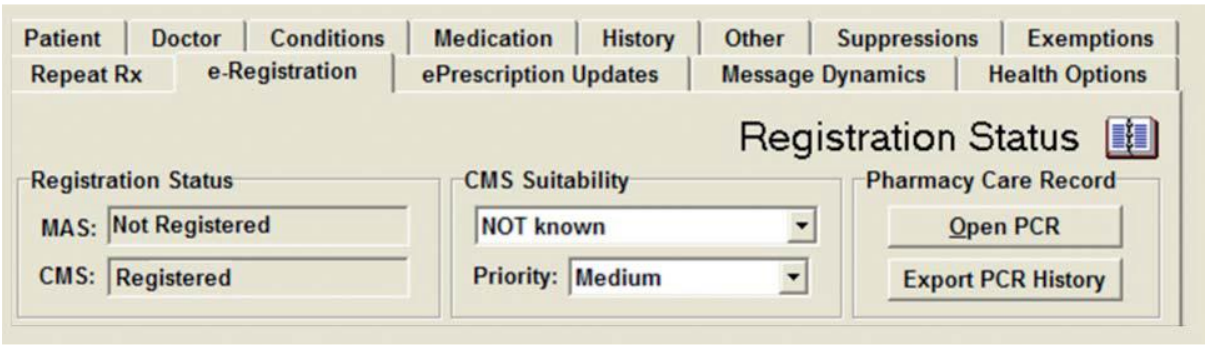


Figure 13-1: link to PCR from the Cegedim RX Pharmacy Manager PMR

Figure 13-2 shows the equivalent functionality in Positive Solution's Analyst PMR system. Select the 'Care Plan' button to display the following two options:

- 'View Care Plan Record' which is the patient level interface and
- 'Export PCR History' which is used for transferring the patient's medication history to PCR.

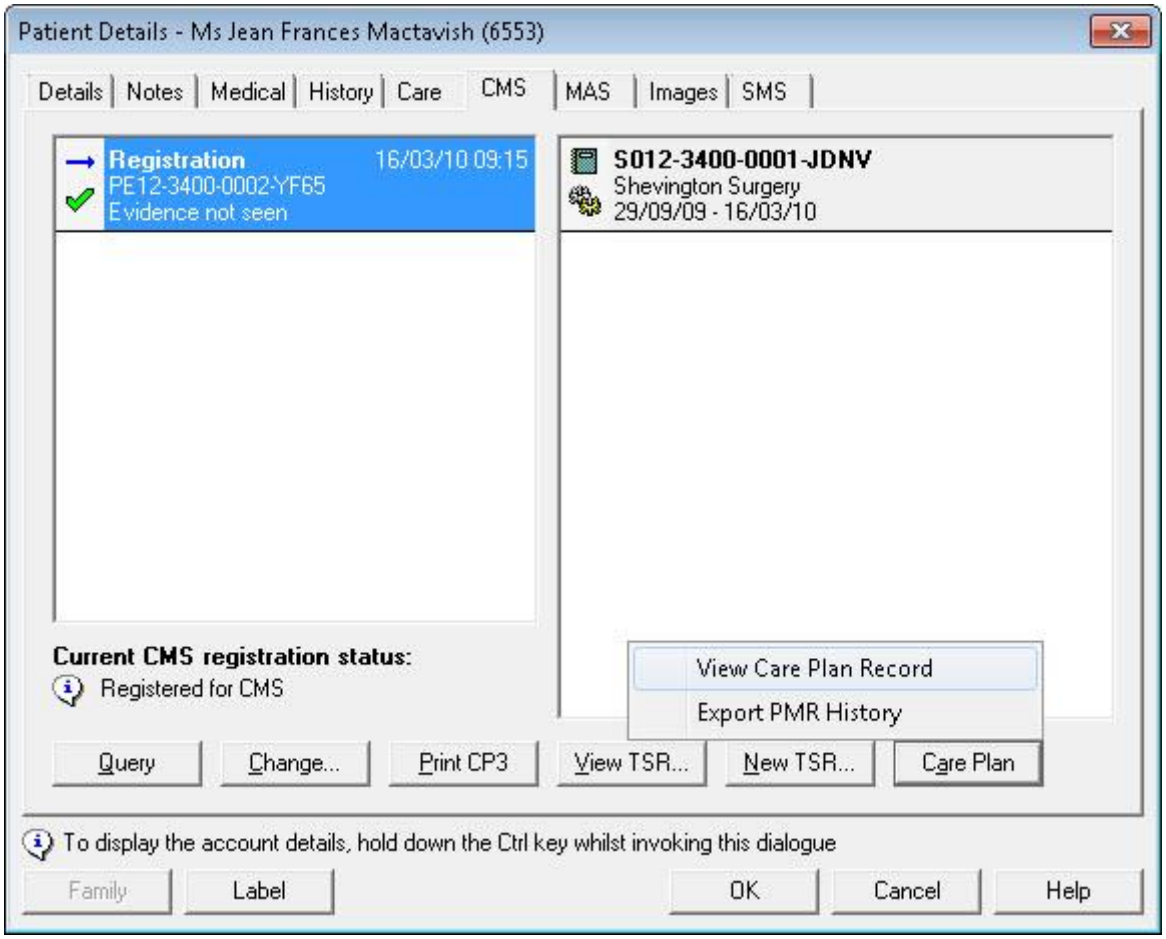


Figure 13-2: Positive Solution's Analyst PMR system

13.2 Patient interface

Having chosen a patient on your PMR who is registered for MCR (or has a registration pending status) you select the relevant option within your PMR for accessing the PCR patient interface. PCR will automatically be opened in a new window on your computer.

Note: If you are not already logged in to PCR you will need to enter your User ID and password and you must have a valid association with the pharmacy within which you are working.

Some PMRs will allow a link to PCR even if the patient is not registered for MCR.

On successful login, PCR will display one of three different options depending on the status of the relevant patient's record on PCR:

1) If a patient record exists on PCR, the CHI number matches that of the patient selected in your PMR and all the demographic details are the same, then you will be taken straight to the patient home page for the patient you wish to view/edit.

2) If a patient record exists on PCR, the CHI number matches that of the patient selected in your PMR but some of the demographic details are different (as in Figure 13-3) then you will be asked if you wish to update the patient's demographics on PCR to match those held on your PMR page.

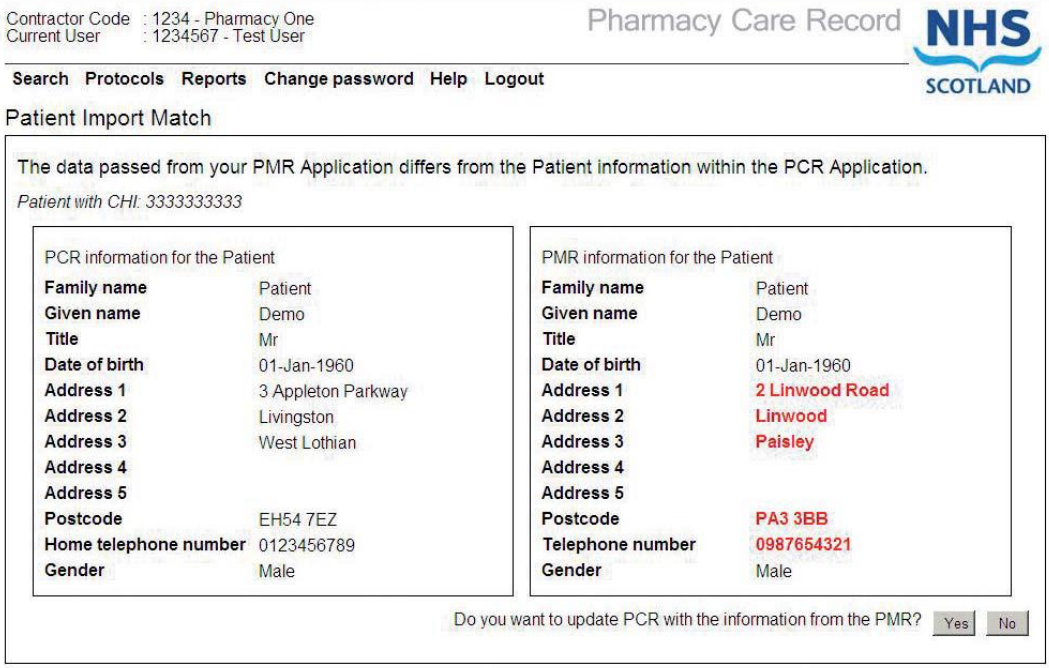


Figure 13-3: PCR page highlighting differences between PMR and PCR demographic information

The patient home page will be displayed once you have chosen to update or ignore the patient demographic updates from your PMR.

3) If the patient does not already exist on PCR then the patient search page will be displayed and the search criteria will be pre-populated with the relevant patient's demographic details as held on your PMR. You can modify these search criteria and research for the patient. You can also click the link that will create a new PCR record for the patient. This link will include the name of the patient to be created. Clicking on this link will automatically take you to the 'create / edit patient details' page and all the demographic details held on your PMR will be pre-populated on the PCR patient details page. If relevant you can then add any other additional details that may not have been held on your PMR and click the 'Save' button to add the patient to PCR. Once saved the patient home page will be displayed.

13.3 Medication history transfer

The medication history transfer is a two-stage process: first, you create an export file using your PMR system and then you need to import the file into PCR.

Creating the medication export file on your PMR:

The medication export file contains the last 24 weeks of dispensing history held for the patient on your PMR from the date of creating the export file. The history export file will include the following details for each item dispensed:

- Medication name
- Pharmacy service (AMS, CMS, etc.)
- Date dispensed
- Quantity dispensed
- Directions for use

The medication name will be the prescribed item name for prescriptions processed electronically (AMS, MCR and MAS). Where the prescription has not been processed from electronic data then the medication name may be the name of the dispensed product, i.e. the brand name.

To create the export file, you select the relevant patient in your PMR system (note the patient must be registered for MCR), then choose the 'PMR History Export' (or equivalent) option from the PCR interface functionality on your PMR system.

Your PMR system will automatically create an export file.

Note: you need to complete the medication history transfer to PCR on the same computer as you performed the export Importing the medication import file to PCR

The export file will be named as follows: Mhddmmyyxxxx.xml where ddmmyyxxxx is the patient's CHI number. If an export fi le already exists for a patient the fi le will be overwritten by any subsequent created export file.

You then click on the 'Import Medication' link. This opens a page requesting you to select the location of the export fi le that you previously created on your PMR.

13.3.1 Importing the medication import file to PCR

To import the medication history file to the Patient's PCR Pharmaceutical Care Plan, you search for the patient on the PMR (this can be done via PMR Patient Interface). You then click on the 'Review' link under the medications section on the patient home page. You will then be shown the "Medications" page (Figure 13-4)

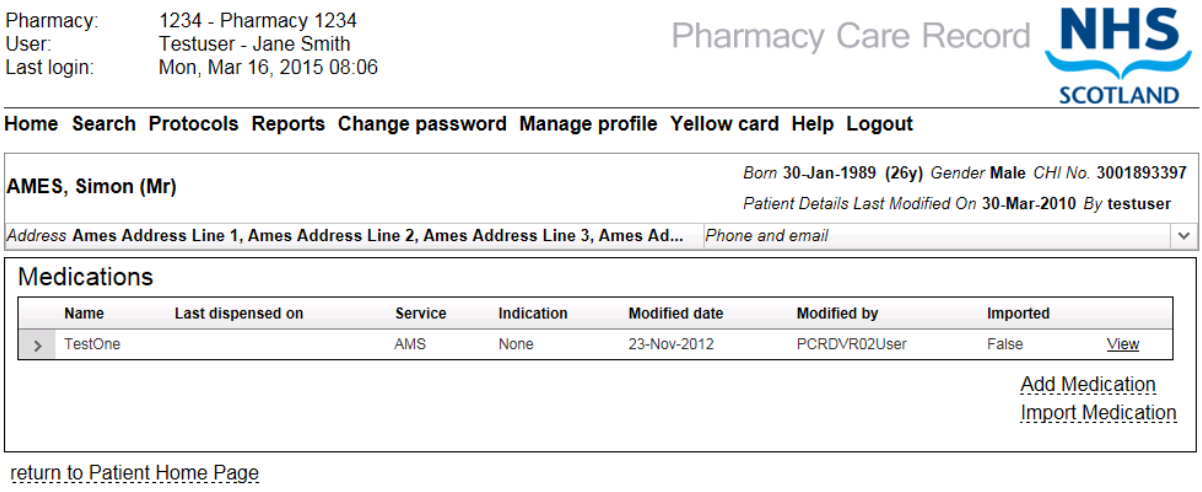


Figure 13-4: Medications page

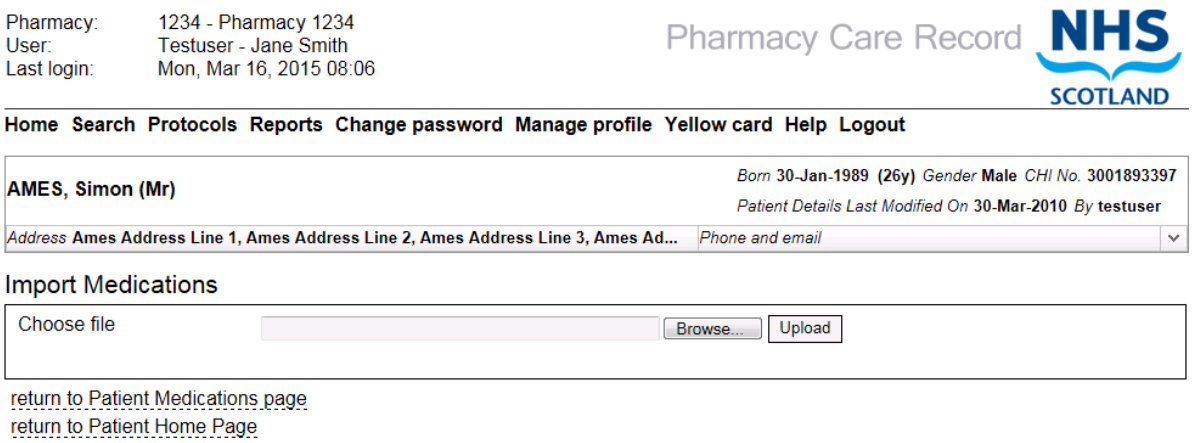


Figure 13-5: Import medications

When you created the export file on your PMR, your PMR will have also saved a copy of the export file's location and filename to the clipboard on your computer. If you perform the import operation immediately after creating the export file, you will not need to manually search and select the medication history export file; instead you can just use the clipboard details to define the location and filename.

If the 'Import Medications' filename area as seen in Figure 13-5, is not 'greyed out' then you can click in the box and then hold the <CTRL> key down and type 'V'. This will paste the fi le name and location of the export file into the box (or you can perform the same function by right clicking the mouse and choosing 'Paste').

Each of the PMR systems store the medication export files in a specific folder on your computer. Your PMR supplier will be able to advise where the medication export files are located on your computer.

Some versions of Internet Explorer include additional security checks which prevent the location and the filename of the export history file being keyed into the Import Medications filename area.

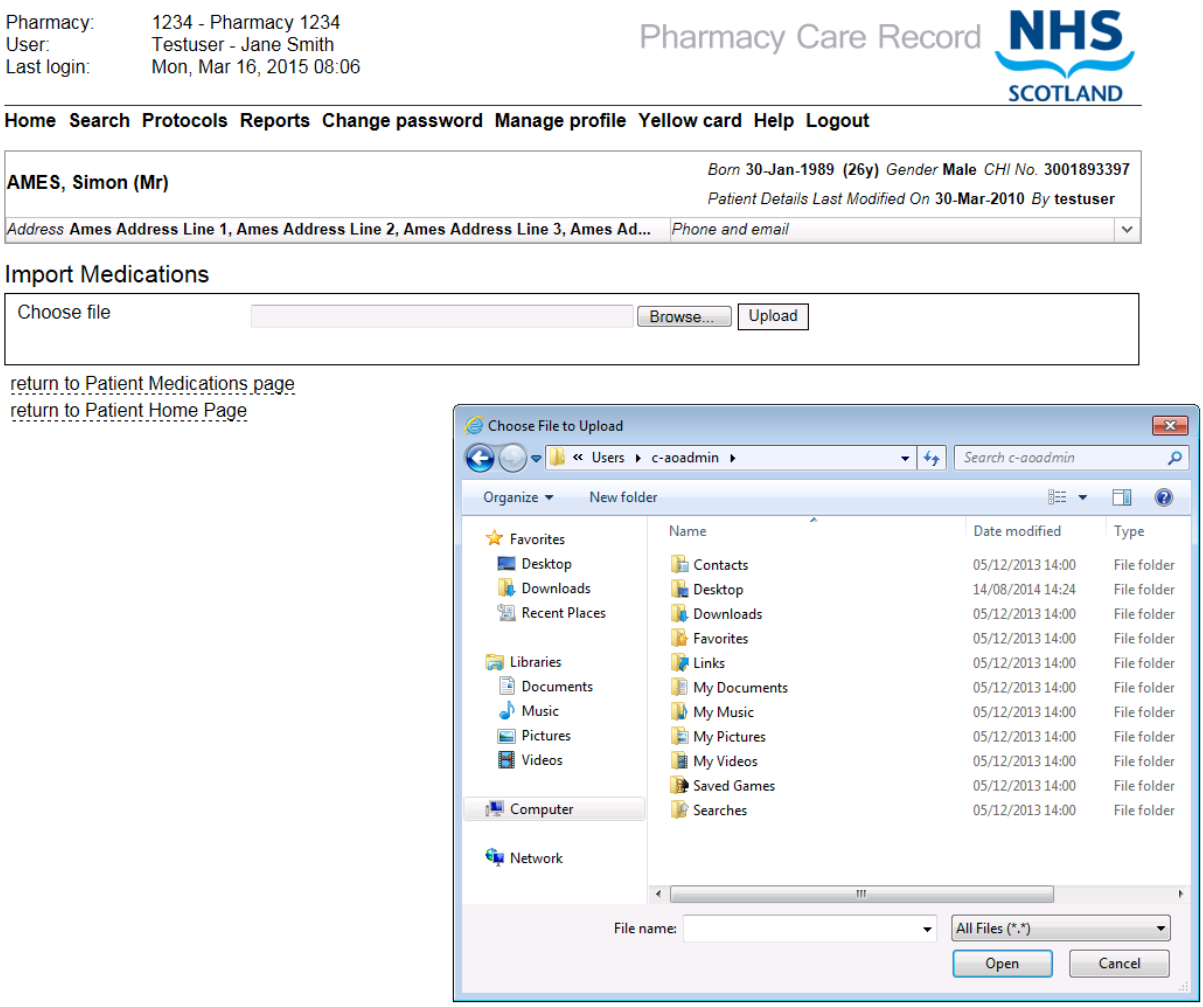


Figure 13-6: PCR medication import page and standard windows file open dialog

If the box is 'greyed out' preventing you from entering information, click the 'Browse' button shown in Figure 13-6. This will open the standard Windows file search dialogue box.

You can now manually search for the file or paste the location and filename into the filename area; hold the <CTRL> key down and type 'V' or use the mouse as described previously.

Figure 13-6 also shows the selection/input of the export filename. You then click the 'Open' button and this will copy the filename and location to the Import Medications filename area box.

Once the export filename and location has been entered on the Import Medications page you click the 'Upload' button. If the export file is a valid medication history export file, the screen seen in Figure 13-7 will be displayed.

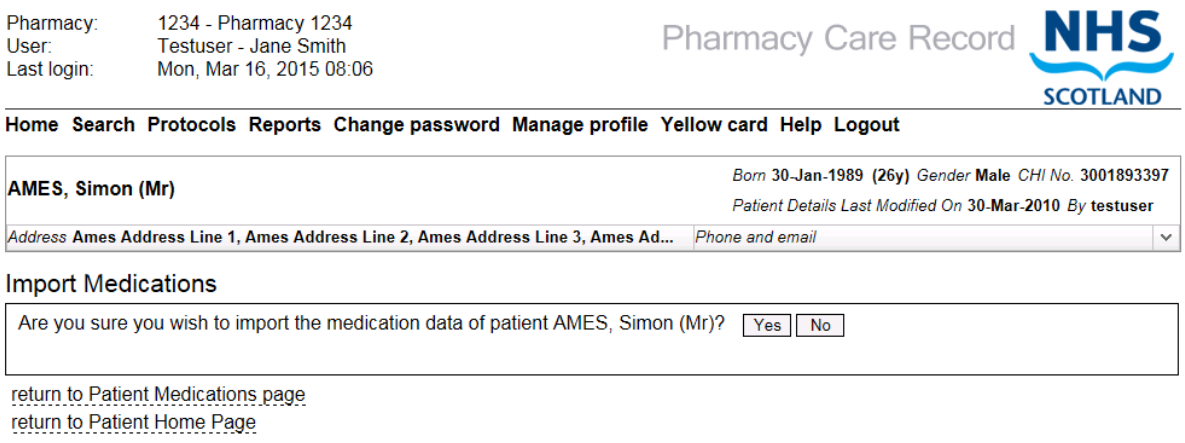


Figure 13-7: PCR patient medication import confirmation page

You will now be asked to confirm that you wish to import the medication details for the patient.

PCR automatically checks that the CHI number included on the medication history export file matches that for the patient that you are currently viewing on the PCR. If the CHI number does not match, then you will not be able to import the medication history details.

The patient's name detailed in the medication history export file is also displayed as an additional check to ensure that the correct patient has been selected.

You confirm that you wish to upload the medication history by clicking 'Yes' on the medication upload confirmation page.

The import process will not overwrite any existing medication history. It will add new dispensing history information (e.g. date, quantity, etc.) to any medication item and service combination that currently exists for the patient.

Once you have confirmed the uploading of the medication history you will be returned to the medication page and the imported medication will be displayed.

Figure 13-8 shows several expanded medication lines which are displayed by clicking '>'and show the dispensing history over the period of time.

Figure 13-8: several expanded medication lines

13.3.2 Editing imported medication

It is not possible to edit any medication details imported from your PCR but you can add an indication or manually add further dispensing history for a medication item. You perform these actions in exactly the same manner as editing a medication item that you have manually added. Figure 13-9 shows the addition of an indication for an item that has been imported from a PMR.

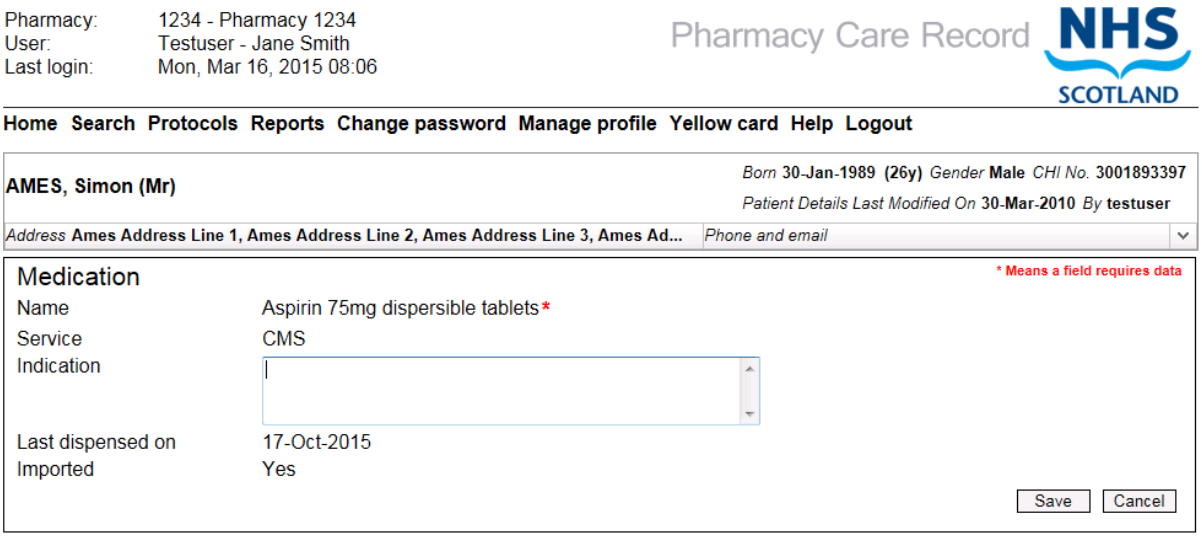


Figure 13-9: PCR patient medication entry/edit page – editing an imported item

13.3.3 Tidying up medication export files

The export files created by your PMR system will remain on your computer after the data has been imported into the patient's record on PCR. It is advisable to delete these export files once the import process is complete.

All files begin with 'MH' followed by the patient's CHI number and end with '.XML'.

All files are in the same folder and can be removed using Windows Explorer. Ensure that only PCR medication history export files are removed and other files that may be required for other applications are not removed.

14 Shared PCR

14.1 Overview

If Shared PCR is enabled for a Health Board the “Hospital” menu is accessible to Pharmacist Users from the PCR High level menu.

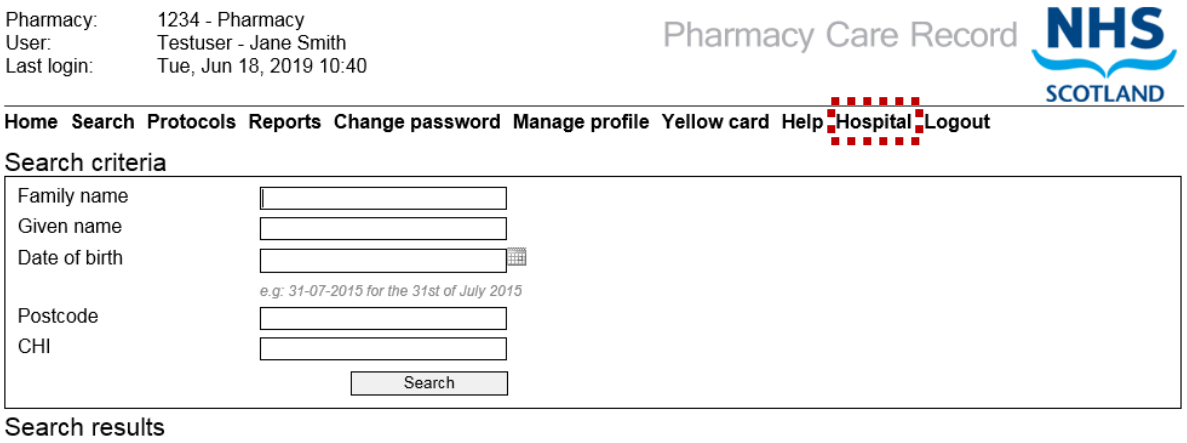


Figure 14-1: Hospital Menu

Shared PCR allows pharmacist users to view and respond to requests and notifications initiated from hospital systems relating to patient discharge and admission notifications.

Please note that the “Requests” list function is not currently in use and information regarding this in section 14.5 is for information only.

14.2 Notifications list

Used to view notifications of patient admission\discharge or discharge letter (Care Plan) sent from the hospital.

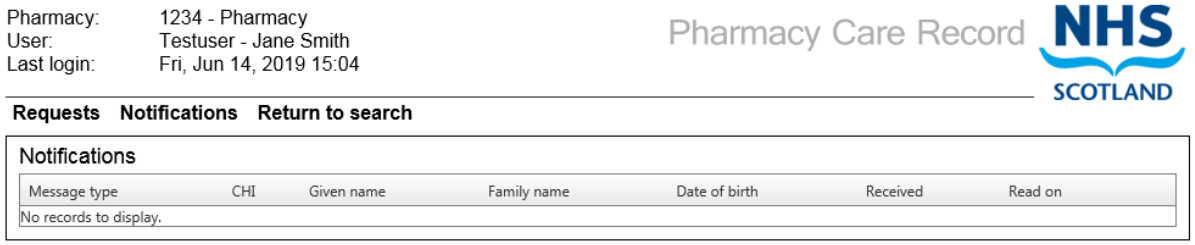


Figure 14-2: Notifications (no records to display)

Once an item has been viewed, the ‘Read on’ field is populated with the date and time of first viewing.

In this example, items in list are displayed in bold text until read.

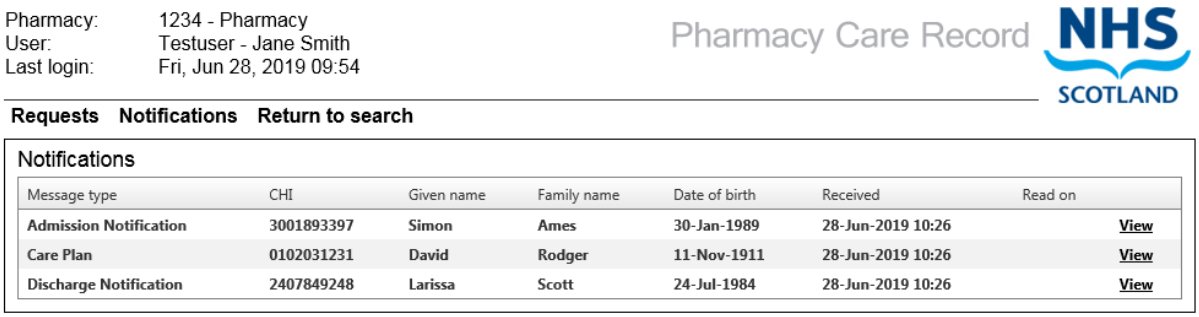


Figure 14-3: All items unread

The screen below shows a mix of read and unread items:

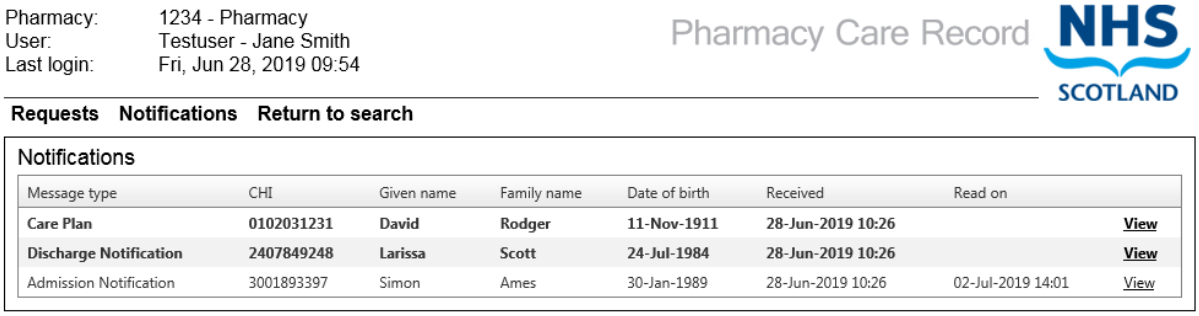


Figure 14-4: mix of read and unread items

The notifications list can display the following information.

Item	Type	Notes
Message type	Display Text	e.g. Discharge Notification or admission notification
CHI	Display Text	
Given name	Display Text	
Family name	Display Text	
Date of birth	Display Text	
Received	Display Text	
Read on	Display Text	
View	Link	Opens popup for admission or discharge notification

14.3 View admission notification

Selecting the “view” link for an admissions notification record in the Notifications list will display the following pop up.

Information in pop-up is read only – no editable details.

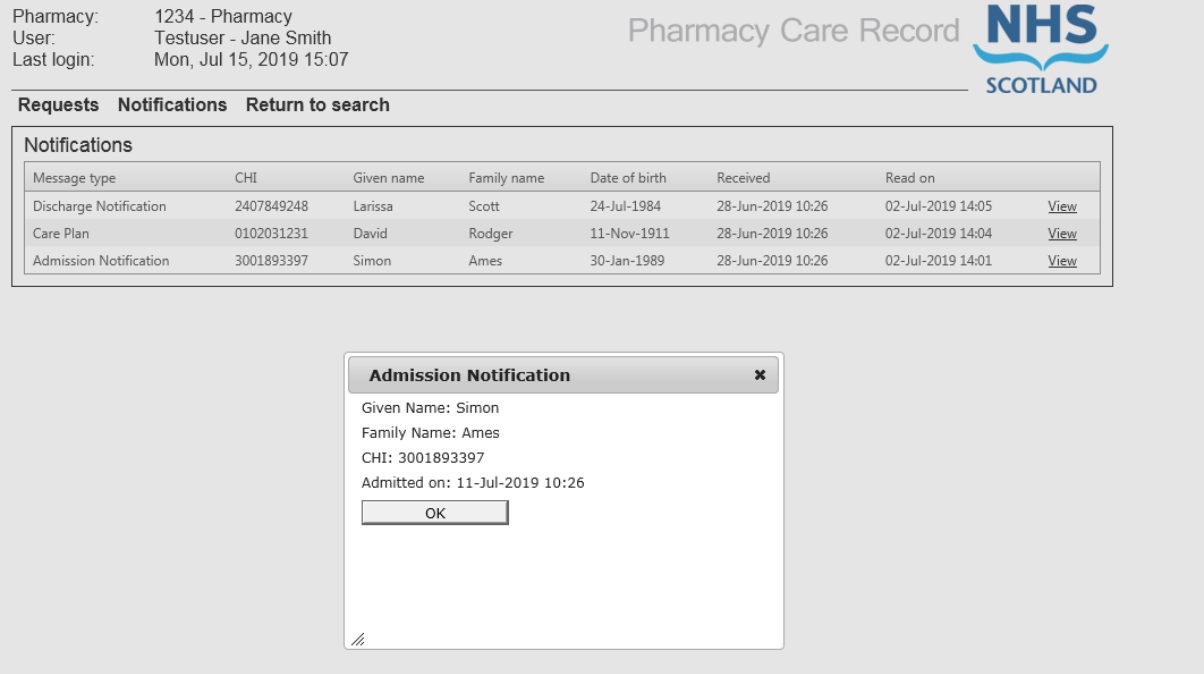


Figure 14-5: Admission notification pop-up

The following information is displayed on the discharge notification pop-up:

Control	Type	Notes
Given name	Display Text	
Family name	Display Text	
CHI	Display Text	
Admitted on	Display Text	
OK	Button	Closes the pop up

14.4 View discharge notification

Selecting the “view” link for a discharge notification record in the Notifications list will display the following pop up.

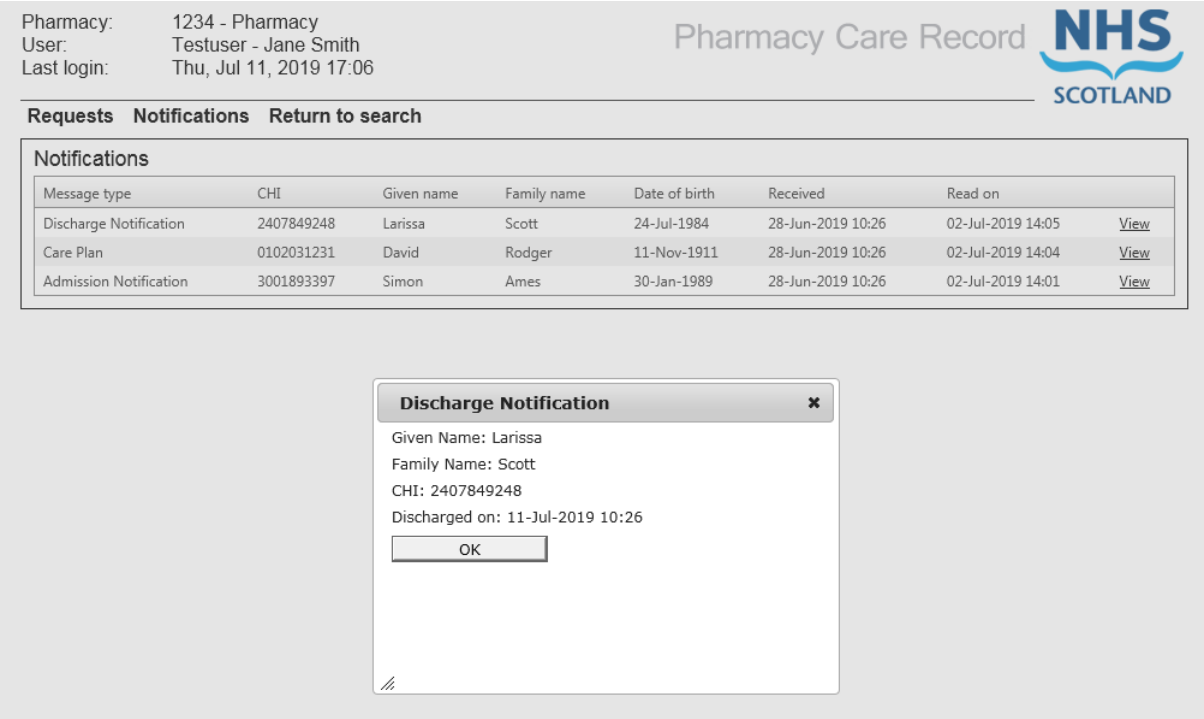


Figure 14-6: discharge notification pop-up

Information in pop-up is read only – no editable details.

The following information is displayed on the discharge notification pop-up.

Control	Type	Notes
Given name	Display Text	
Family name	Display Text	
CHI	Display Text	
Discharged on	Display Text	Displays the date the patient was discharged from hospital
OK	Button	Closes the pop up.

14.5 Requests list [for info currently not supported]

"Requests" list function is not currently supported and information in this section is for information only.

The "Requests" list is the default page for Shared PCR having selected the "Hospital" menu. Pharmacists can view and respond to requests sent from hospital.

Pharmacists use this information to search PCR for an existing patient record and fulfil the request where patient data is available.

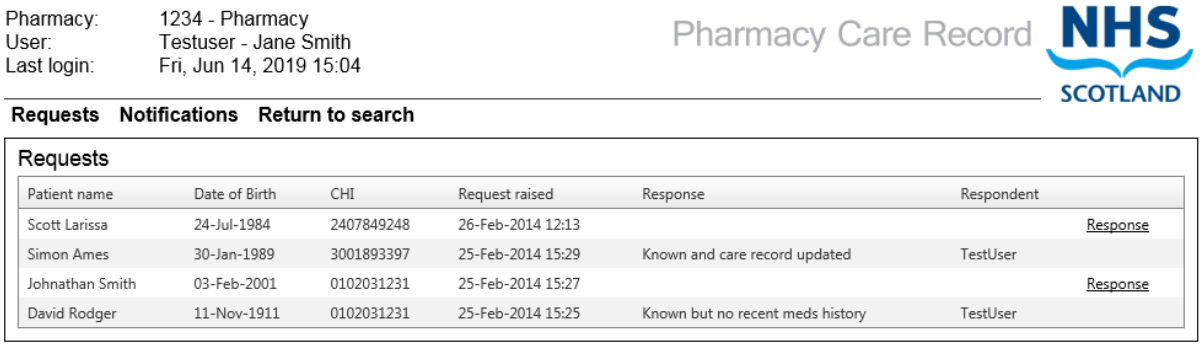


Figure 14-7: Requests list

The following information is displayed for Requests:

Item	Type	Notes
Patient name	Display Text	
Date of Birth	Display Text	
CHI	Display Text	
Request raised	Display Text	
Response	Display Text	Possible values that can be displayed: • Known and care record updated • Known but no recent meds history • Unknown to pharmacy
Respondent	Display Text	PCR user ID
Response (Link)	Link	Only visible if a "response" has not been recorded.

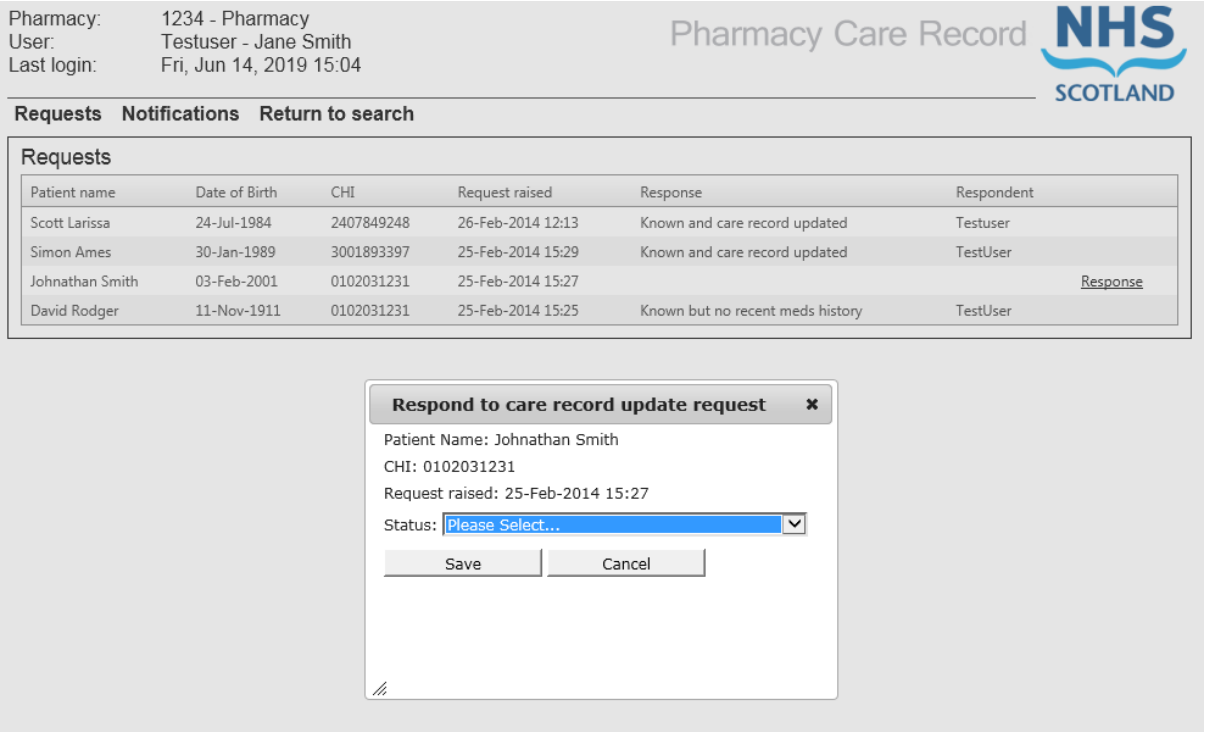


Figure 14-8: Respond to care record update request

Below is the “Status” dropdown list with the available options visible:

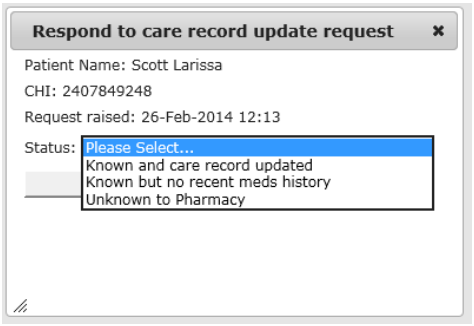


Figure 14-9: “Status” dropdown values

Selecting the “Response” link allows for the value in the “Response” (display text) column to be updated to show the item selected from the “Status” dropdown menu.

Item	Type	Notes
Patient Name	Display text	
CHI	Display text	
Request raised	Display Text	
Status	Dropdown list	Possible selectable values: • Known and care record updated • Known but no recent meds history • Unknown to Pharmacy
Save	Button	Saves selected Status to “Response” column.
Cancel	Button	Closes the pop up and no changes are saved

15 [Appendix A] Error Messages

The following list shows the error messages that may occur when accessing the PCR User Association website to associate with a pharmacy. The list is split into technical and general errors.

Note: *Each error message contains instructions on any actions you need to take. If a technical error occurs, you should check in Appendix C and if after following any of the suggested actions you are still not able to associate yourself with a pharmacy you should contact the ePharmacy helpdesk.*

PCR Code 101
Association Error: Technical/General Error – No valid ePharmacy certificate found. Please ensure that you are performing this operation on your main PMR server. If you are using your main PMR server please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 102
Association Error: Technical Error – Certificate not accessible. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 103
Association Error: Technical Error – Unable to sign association request. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 212
Authentication Error: Your account is currently locked. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 201
Authentication Error: Incorrect User ID or Password entered. Please try again, entering your correct User ID or Password

PCR Code 202
Authentication Error: Your password must be changed before attempting the association process. Please change your password and then associate yourself.

PCR Code 203
Authentication Error: You do not have permission to perform this action. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 204
Authentication Error: Your account is suspended. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 104
Association Error: An invalid Contractor Code was entered. If you believe the contractor code to be correct, please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 105
Association Error: our Contractor Code is not valid with your ePharmacy certificate. If you believe the contractor code to be correct, please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 106
Association Error: Your association request could not be verified by the PCR server (Invalid EPOC). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 107
Association Error: Technical Error – Your association request could not be verified by the PCR server (Invalid signature). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 108
Association Error: Technical Error – Your association request could not be verified by the PCR server (Invalid certificate). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 109
Association Error: Technical Error – Your association request could not be verified by the PCR server (no signature present). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 110
Association Error: Technical Error – Please check that the time and date on your PC is correct. Check and, if necessary, correct the time and date on your computer. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 111
Association Error: Technical Error – No timestamp present in the association message. Please ensure that you have followed all the association steps in the PCR User Guide. If this issue reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 112
Association Error: Technical Error – Your association request could not be processed. The timestamp is not in a valid format. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 113
Association Error: An invalid Contractor Code was entered. If you believe the contractor code to be correct, please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 114
Association Error: Technical Error – Your association request could not be verified by the PCR server. (no signature present). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 300
Application Error: A general error has occurred. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 205
Authentication Error: Incorrect User ID or Password entered when changing password or your account is locked. If you have forgotten your password, please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 206

Authentication Error: You are no longer associated with a pharmacy. Please re-associate with a pharmacy before attempting to change your password.

PCR Code 207
Reset Password Error: Your new password must be at least 8 characters and contain at least 1 non-alphanumeric character, at least 1 digit, at least 1 uppercase character and at least 1 lowercase character. A password must be different to the previous 12 passwords. Please re-enter a new password.

PCR Code 208
Authentication Error: You do not have permission to access PCR. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.scot for support.

PCR Code 210
Reset Password Error: Your new password must not be the same as your current password. Please re-enter a new password.

16 [Appendix B] Create PCR shortcut on desktop

Section 1 of the User Guide detailed the URLs (website addresses) for accessing the PCR Association website and the main PCR website. Your PMR supplier may have added icons to your computer desktop enabling you to quickly access PCR without entering the relevant URL into Internet Explorer. If you do not have the required PCR icons on your computer desktop, then you can add them by following these instructions.

Note: *the instructions detail the creation of an icon for the main PCR website but can be repeated for the creation of an icon for accessing the PCR Association website.*

To create a PCR icon on your desktop:

- Type the PCR website https://pcr.mhs.scot.nhs.uk into the address bar of your browser, the PCR login page is displayed
- Right-click anywhere on the page, Internet Explorer context menu is displayed (Figure 16-1)
- Select “Create Shortcut” from the context menu

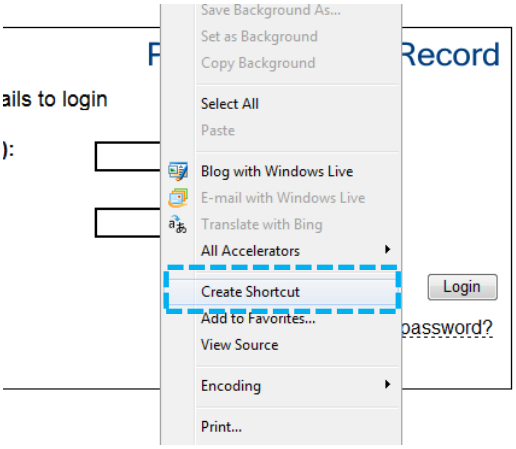


Figure 16-1:right click to “Create shortcut”

- A popup message will be displayed (Figure 16-2)

Figure 16-2: Confirm “Create shortcut”

- Select “Yes”
- A shortcut to PCR is placed on your Desktop (Figure 16-3)

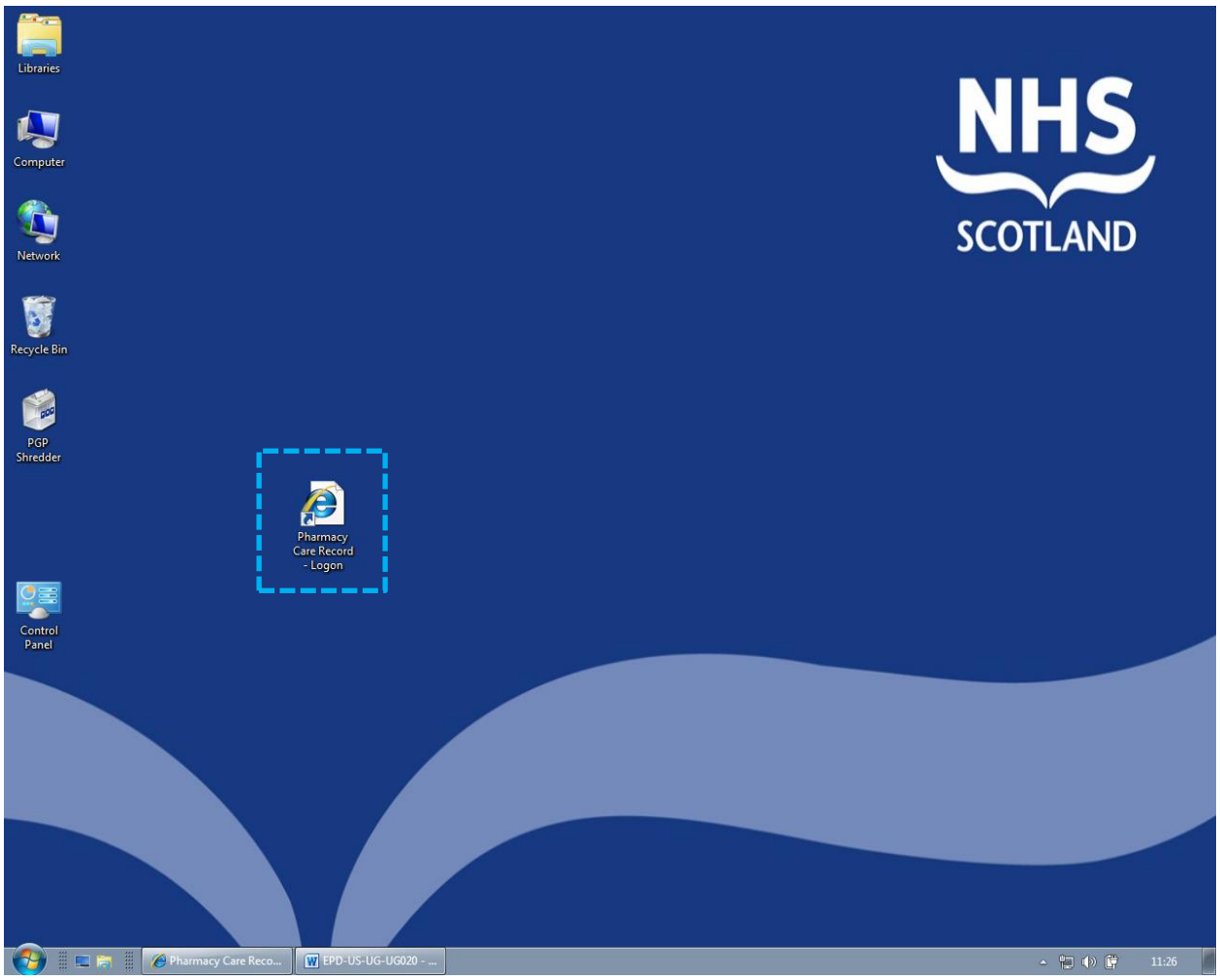


Figure 16-3: PCR Icon on Desktop

17 [Appendix C] Example test patients

[Test patients must not be added to the PMR]

17.1 Test patient 1

Name:

Ms Sally Shortbread

CHI number:

5555555555

Relevant medical history:

Hypertension (2 years ago)

Osteoarthritis (3 years ago)

Current drug therapy:

Bendroflumethiazide 2.5 mg tablets: one daily (started 2 years ago) Lisinopril 10 mg tablets: one daily (started 1 year ago)

Paracetamol 500 mg tablets: one three times a day (started 3 years ago)

Other information:

Doesn’t always take her diuretic due to concerns about night-time diuresis, especially when staying with family. (Patient takes ACE inhibitor and diuretic together at tea-time).

Has difficulty pressing out paracetamol tablets from the blister pack.

Suffers arthritic pain regularly.

Smoker

17.2 Test patient 2

Name:

Mr Bertie Biscuit

CHI number:

7777777777

Relevant medical history:

Diabetes (10 years ago)

Hypertension (5 years ago)

Current drug therapy:

Metformin 500 mg tablets: one twice daily (started 7 years ago) Ramipril 10 mg capsules: one daily (started 3 years ago) Bendroflumethiazide 2.5 mg tablets: one daily (started 5 years ago) Simvastatin 40 mg tablets: one daily (started 3 years ago)

Previous drug therapy:

Glibenclamide 5mg tablets: once daily (stopped 9 years ago) Tolbutamide 500mg tablets: two daily (stopped 7 years ago)

Other information:

Poor understanding of rationale of medicines Poor vision due to cataracts

Overweight

Smokes about 10 cigarettes a day

17.3 Test patient 3

Name:

Mr Colin Cracker

CHI number:

9999999999

Relevant medical history:

COPD (1 year ago)

Osteoarthritis (15 years ago)

Current drug therapy:

Paracetamol 500 mg: two three or four times daily (10 years ago) Salbutamol inhaler: two puffs when required (1 year ago) Tiotropium 18 mcg inhaler: one puff daily (6 months ago) Symbicort 400/12 inhaler: one puff twice daily (3 months ago)

Previous drug therapy:

Amoxicillin 500mg capsules: one three times a day Co-amoxiclav 625mg tablets: one three times a day Prednisolone 5mg tablets: eight daily

Other information:

Suffers frequently with chest infections.

Uses salbutamol inhaler – 4 puffs six times daily – doesn't get much benefit – no tremors or palpitations. Wife says white 'smoke' comes out his mouth after using it.

Smoker

Slightly overweight

18 [Appendix D] Using PCR association function from a computer without an ePharmacy Certificate

The PCR association process (as detailed in section 1 of this Guide) uses the ePharmacy Certificate. This means that association can only be successfully accessed from a computer that has the ePharmacy certificate installed; in most cases this will be your PMR server computer.

If you attempt to perform PCR association on a computer that does not have your ePharmacy certificate installed, you will see the following error page (Figure 18-1).

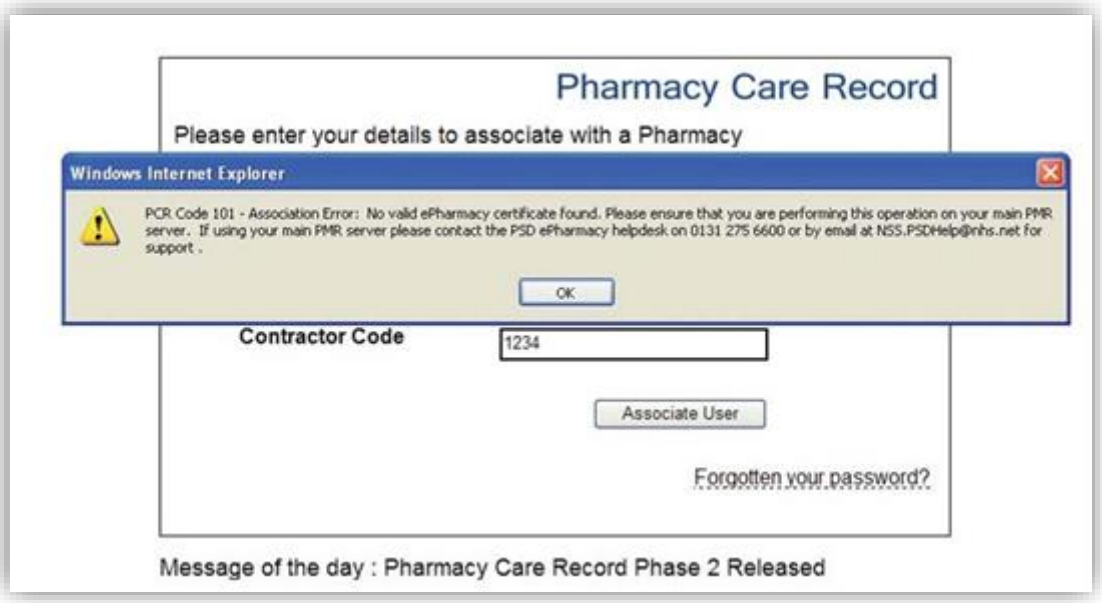


Figure 18-1: Error message if ePharmacy Certificate not present

19 [Appendix E] Unable to access the PCR association function

If you receive an error on your computer requesting, you to install an ‘Active X’ component or the association process fails with a technical error and you did not see the ‘certificate security alert pop-up’ window as shown in (Figure 18-1) then you may be able to resolve the issue by adding the PCR Association website to your list of trusted websites.

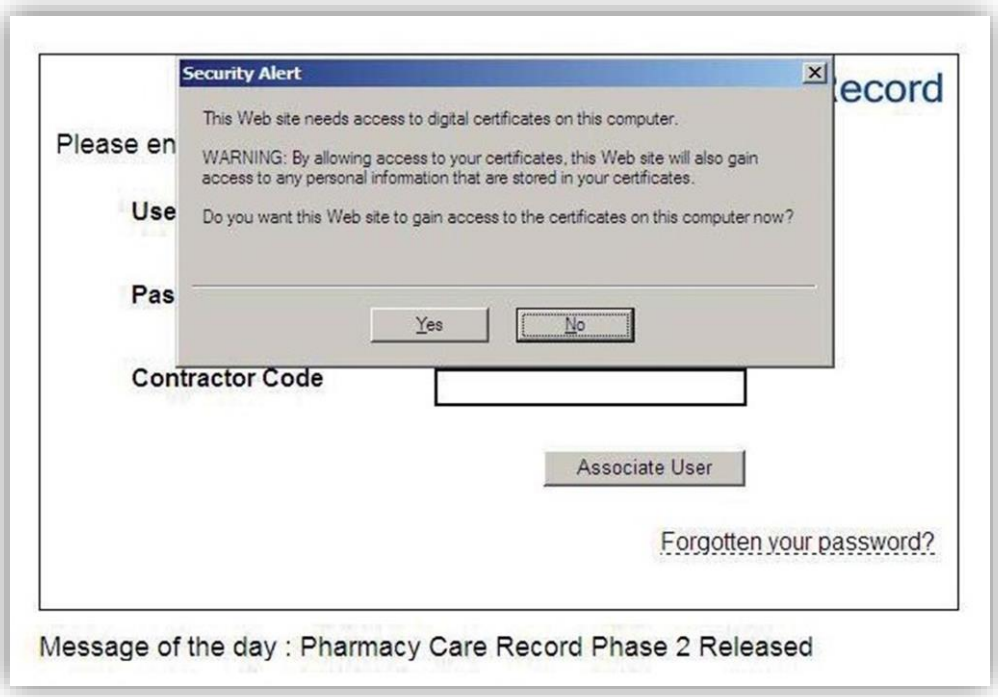


Figure 19-1: Initial association page

To add the PCR Association website to the list of Trusted Websites:

- Open Internet Explorer (this does not have to be the PCR Association page)
- Select the ‘Tools’ menu and then ‘Internet Options’ (Figure 19-2)

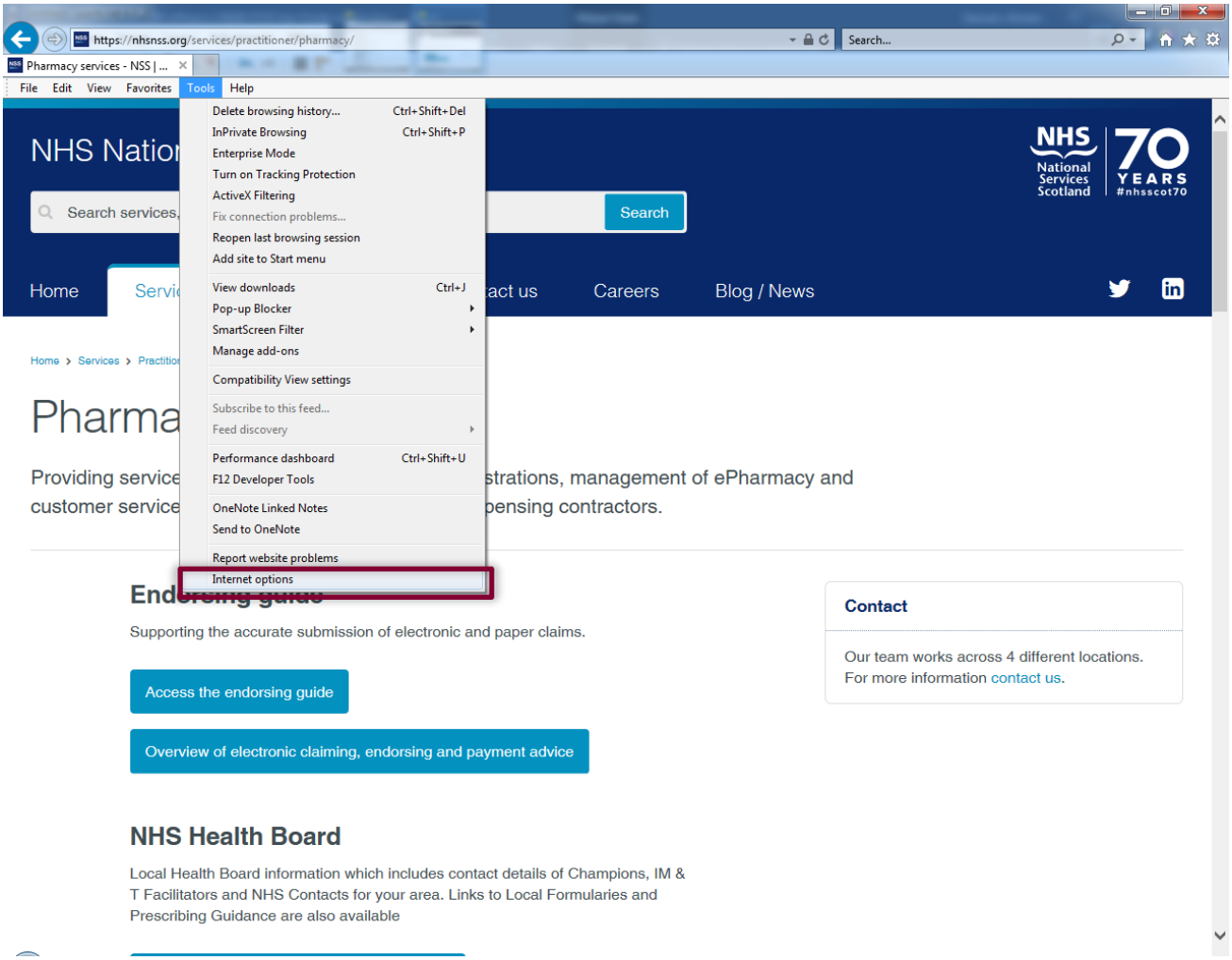


Figure 19-2: Tools > Internet Options (IE11)

- Select the security tab and then select the “Trusted sites” zone (Figure 19-3).

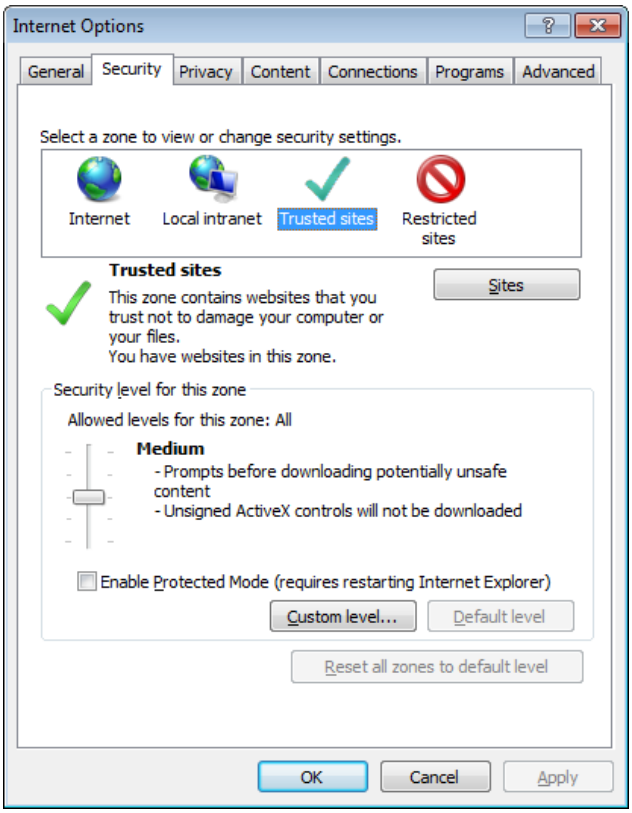


Figure 19-3: Trusted sites zone on security tab

- Click the “Sites” button, the “Trusted” sites dialogue is shown (Figure 19-4)

Figure 19-4: Trusted sites dialogue

If there already is an entry for the PCR association website listed, then close all the dialogue boxes and contact the ePharmacy Helpdesk to report your issue with PCR Association.

If there is no entry present:

- Enter the website address for the PCR Association website in the ‘Add this website to the zone:’ *(Figure 19-4).
- click the ‘Add’ button, then click the OK button on the trusted sites dialogue and the “ok” button on “Internet Options”.

The PCR Association website address is https://pcrua.mhs.scot.nhs.uk

After clicking the ‘Add’ button the dialogue box will be updated and you will see that https://pcrua.mhs.scot.nhs.uk is now listed as a trusted website. There can be many websites listed and the PCR Association address may not be at the top of the list.

Re-open Internet Explorer and open the PCR Association page or click on the desktop shortcut if you have previously created one.

Re-attempt to associate yourself with the pharmacy where you are working. If you still get a failure report the issue to the ePharmacy helpdesk.

Additional information to help resolve these issues is available from the NHSNSS.org website

https://nhsnss.org/services/practitioner/pharmacy/pharmacy-care-record-pcr

Time Synchronisation Error

The association process requires that the time on your PC is accurate (a maximum of a 10-minute leeway is allowed). If you have issues with association, please check that the computer's clock is correct (both date and time).

20 [Appendix F] PCRUA Windows Client based Association

If PCRUA Windows Client is already installed, then follow the steps in section 21.1 to perform the association.

A user can only access patient records relating to the pharmacy where they are currently working. A user must "associate" with the pharmacy where they are working when they begin work in their usual or a different pharmacy – usually each morning.

In most pharmacies, the association process can only be performed on the main 'server' computer in the pharmacy, however, some large multiple pharmacies may allow the association process from any computer in the pharmacy.

The main server computer is usually the one where the ePharmacy Certificate Management Application is installed and the ePharmacy Client Certificate resides (except Lloyds pharmacy).

The association process makes use of the ePharmacy Certificate in one of the checks to ensure that the user is in the pharmacy that they are currently requesting to be associated with.

Note: *Association only needs to be performed once a day or when moving to a different pharmacy – where a user has already associated with another pharmacy that day.*

20.1 Associate with the Pharmacy

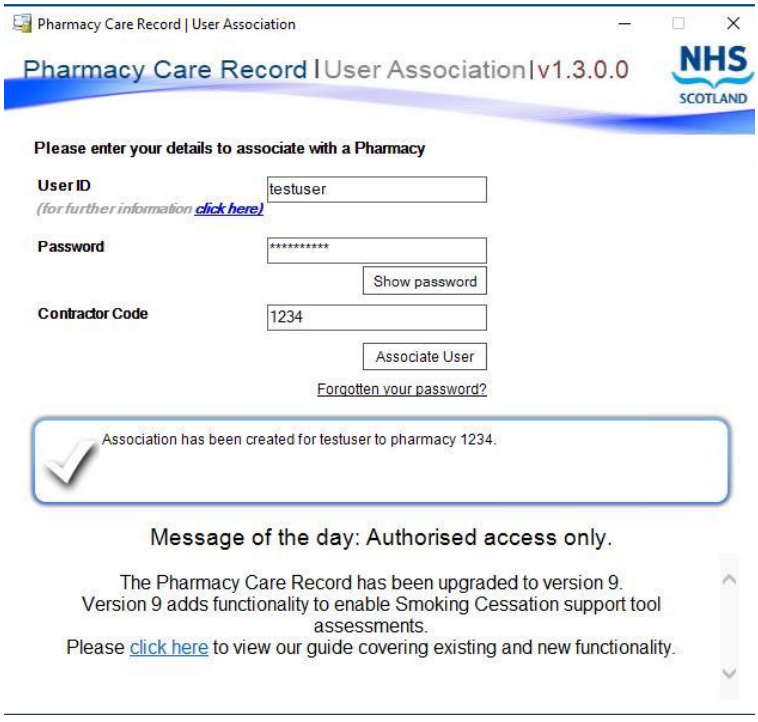
Users will need to follow the below steps to associate with the pharmacy using the PCRUA Windows Client application installed on the pharmacy system.

Step 1:

- You will see a PCRUA Windows client desktop icon displayed on the Desktop screen or search for it in the Windows Start Menu. Double-click on the icon and wait for PCRUA Windows Client to launch.

Step 2:

- Enter PCR User ID, Password and contractor code and select the "Associate User" button



Step 3: Check association is successful

- If the association is successful, an appropriate message will be displayed in green text
- If you tried associating with your temporary password, you will see a message on the screen with instruction to reset your temporary password before the association can be complete