

Pharmacy Care Record

# Version 11

User Guide



# Document information

## Document control

Document Ref.:	UG020
File Name:	PCR_User_Guide.pdf
File Version Number:	12.0 Final
File Version Date:	01/06/2016

## Acknowledgements

The diligence of all contributors to this User Guide is gratefully acknowledged.

Thanks, in particular, are extended to primary care colleagues in NHS Fife and the GP practices and community pharmacies who took part in the Early Adopter initiative for their assistance in contributing to the working processes underpinning the Chronic Medication Service. Thanks are also due to Dr Scott Cunningham and the staff at the School of Pharmacy and Life Sciences at Robert Gordon University for supplying the case studies for the test patients.

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## Cover Image Source

Atos Mediabank; Asset ID: 2420

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## Introduction

### The Pharmacy Care Record (PCR)

PCR is a web-based application that assists Pharmacists and Pharmacy Technicians with Pharmaceutical Care Planning in Scottish community pharmacies.

A registered PCR user can create and maintain patient records containing information that relates to:

- Patient details
- Pharmaceutical care plans
- Care issues and care issue outcomes
- Core service registration information for CMS and MAS
- Complex dispensing
- High risk medicine care risk assessments for Methotrexate, Lithium and Warfarin
- New medicine interventions
- Gluten-free annual health check support tool assessment
- Smoking cessation support tool assessment

This functionality is further supported by:

- A rigorous access and security model
- The capability to synchronise patient medication and demographic information between the PMR and PCR
- Pharmacy level reports
- External link to the MHRA 'Yellow Card' web portal

### About this user guide

This user guide covers all versions of PCR up to and including version 11.

New functionality in PCR version 11 includes:

- Import of core service registration information from PRS
- Core service registrations totals on pharmacy home
- Core service registration icons in patient home banner
- Core service registrations summary on patient home
- Core service registrations reports
- Core service registration icons displayed on pre-existing reports

This user guide complements the NES Pharmacy Chronic Medication Service (CMS) Implementation Resource Pack. Resource pack copies are available on request from NES Pharmacy.

In particular, this user guide should be read in conjunction with section 4 of the NES Pharmacy CMS Implementation Resource Pack which describes the pharmaceutical care planning process.

**NOTE:** Some figures within the document show screens from previous versions of PCR but the functionality described is identical to that in the current version of PCR.

## Creating test patients

Test patients can be created to support PCR training. Test patients must only be given 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 D: 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.

## User guide structure

<b>Section 1:</b> Access and security	Describes the security arrangements for PCR and use of the 'associate' function to determine your pharmacy and login to PCR.
<b>Section 2:</b> High-level menu functions	Explains the links on the high level menu with reference to more detailed guidance on some functions elsewhere in the document.
<b>Section 3:</b> Pharmacy Home page	The Pharmacy home pages displays a high-level summary of patients within the pharmacy
<b>Section 4:</b> Search for and create patient records	Detailed guidance on how to create and search for patient records on PCR.
<b>Section 5:</b> Pharmaceutical care plans	Create and maintain pharmaceutical care plans for patients including the creation and maintenance of patient profile information, care issues, and care issue outcomes.
<b>Section 6:</b> 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.
<b>Section 7:</b> New medicine interventions	Create and maintain new medicine interventions and associated care issues and care issue outcomes.
<b>Section 8:</b> Gluten-free Support Tool Assessment	Create and maintain Gluten-free support tool Assessment and associated care issues and care issue outcomes.
<b>Section 9:</b> Smoking Cessation Support Tool Assessment	Create and maintain Smoking Cessation support tool assessment and associated care issues and care issue outcomes.
<b>Section 10:</b> Reports	<p>This section includes details of all reports accessible from the report summary page. These include</p> <ul style="list-style-type: none"><li>• Care issue (Outstanding) and patient report for pharmacy</li><li>• Core service registrations reports (for</li></ul>

CMS and MAS)

- Care issues (Open)
- New medicine interventions support tool reports
- Complex dispensing patient reports
- Gluten-free reports
- High risk medicine assessments support tool reports
- Smoking cessation support tool reports

## **Section 11: PMR interface to PCR**

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

## **Appendix A: Error Messages**

Full list of application error codes and their meaning

## **Appendix B: Create PCR shortcut on desktop**

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

## **Appendix C: PCR association – common issues**

Explains common issues with the PCR association process.

## **Appendix D: Example test patients**

Three example test patients

## **Appendix E: Test patient case studies**

Test patient case studies to help you learn about PCR.

# 1 Access and security

## 1.1 Key principles

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 N3 connection or an authorised corporate network with an approved N3 gateway.
- Access to PCR is limited to practising 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.

## 1.2 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.

### 1.2.1 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

## 1.3 User Role

Access to each function in PCR is determined by user role. User role is set when the user account is created. Separate user roles are available for Pharmacists and Pharmacy Technicians. Pharmacists can access all PCR functionality, however, Pharmacy Technicians have access to a limited set of functionality.

**Summary of functions that can be accessed by a Pharmacy Technician:**

### 1.3.1 High Level Menus

Function	Access
Home	Partial Access
Search	Full Access
Protocols	No Access
Reports	Partial Access
Change Password	Full Access
Manage Profile	Full Access
Yellow Card	Full Access
Help	Full Access



Logout	Full Access
--------	-------------

\*High risk medicine and new medicine reports will not be visible.

### 1.3.2 Search, Create and Edit Patients

Area	Access
Search for patient	Full Access
Find CHI	Full Access
Create Patient	Full Access
Patient Import	Full Access
Edit Patient Details	Full Access
Medication Import	Full Access

### 1.3.3 Patient Context Tabs

#### Pharmaceutical Care Plan Tab

Function	Access
Pharmaceutical Care Plan Tab	Full Access
Patient Profile	Full Access
Pharmaceutical Care Risk Assessment	No Access
View Care Issues Summary	Partial Access
Create Standard Care Issue	No Access
Edit Standard Care Issue	No Access
View Care Issue	Partial Access
Create high risk medicine Care Issue	No Access
Edit high risk medicine Care Issue	No Access
Create new medicine Care Issue	No Access
Edit new medicine Care Issue	No Access
Create Gluten-free Care Issue	Full Access
Edit Gluten-free Care Issue	Full Access
Create smoking cessation Care Issue	Full Access
Edit smoking cessation Care Issue	Full Access
Medication Items (Summary)	Full Access
Core Service Registrations (Summary)	No Access

\*Can only see Gluten-free and Smoking Cessation

#### High Risk Medicine Tab

Function	Access
High Risk Medicines tab	No Access (Tab Hidden From View)
Start a high risk medicine assessment	No Access
View high risk medicine review page	No Access

\*Tab Hidden From View

#### New Medicine Tab

Function	Access
New Medicines Tab	No Access (Tab Hidden From View)
Start new medicine assessment	No Access
View new medicine review page	No Access

#### Support Tools Tab

Function	Access
----------	--------

<i>Support Tools Tab</i>	Full Access
<i>Gluten Free</i>	
Start Gluten-free Support Tool Assessment	Full Access
View Gluten-free Support Tool Assessment	Full Access
Edit Gluten-free Support Tool Assessment	Full Access
View Summary of Gluten-free support tool assessments	Full Access
<i>Smoking Cessation</i>	
Start Smoking Cessation Support Tool Assessment	Full Access
View Smoking Cessation Support Tool Assessment	Full Access
Edit Smoking Cessation Support Tool Assessment	Full Access
Submit Smoking Cessation Support Tool Assessment MDS	Full Access
View Summary of smoking cessation support tool assessments	Full Access

## Reports

Report	Access	Notes
Outstanding care issues	Full Access	Can only see Gluten-free and Smoking Cessation
Patient report for associated pharmacy	Full Access	
CMS Registered Patients with a record in PCR	No Access	Not visible on reports page
CMS Registered Patients with NO record in PCR	No Access	Not visible on reports page
CMS Registered Patients with initial assessment complete set	No Access	Not visible on reports page
CMS Registered Patients with initial assessment complete NOT set	No Access	Not visible on reports page
MAS Registered Patients with a record in PCR	No Access	Not visible on reports page
MAS registered and MAS lapsed patients with a record in PCR	No Access	Not visible on reports page
MAS registered and MAS lapsed patients with NO record in PCR	No Access	Not visible on reports page
Open Care Issues With at least 1 Review Date set	Full Access	Can only see Gluten-free and Smoking Cessation
Open care issues with review due in 7 days	Full Access	Can only see Gluten-free and Smoking Cessation
Open care issues with review due in 14 days	Full Access	Can only see Gluten-free and Smoking Cessation
Open care issues with no outcome ever recorded	Full Access	Can only see Gluten-free and Smoking Cessation
Open care issues with no review date but at least 1 outcome	Full Access	Can only see Gluten-free and Smoking Cessation
Open care issues where review date is in the past	Full Access	Can only see Gluten-free and Smoking Cessation
Gluten-free reports Diagnosed coeliac patients (historical)	Full Access	
Gluten-free diet set to Yes	Full Access	
Gluten-free diet set to No	Full Access	
Gluten-free diet set to Not Recorded	Full Access	
All gluten-free assessments	Full Access	
All open gluten-free assessments	Full	

	Access	
All completed gluten-free assessments	Full Access	
Annual health check scheduled up to 8 weeks from today	Full Access	
Annual health check not completed in pharmacy	Full Access	
Open smoking cessation assessments	Full Access	
Completed smoking cessation assessments	Full Access	
No interactions in the last seven days	Full Access	
Expiring within the next seven days	Full Access	
No quit date set	Full Access	
Awaiting 4 or 12 week follow up	Full Access	
Complex dispensing patient reports Complex dispensing patient set to Yes	Full Access	
Complex dispensing patient set to No	Full Access	
Complex dispensing patient set to Not Recorded	Full Access	
High risk medicine assessments support tool reports	No Access	Not visible on reports page
All high risk medicine assessments for the pharmacy	No Access	Not visible on reports page
All open high risk medicine assessments	No Access	Not visible on reports page
All completed high risk medicine assessments	No Access	Not visible on reports page
New medicine intervention support tool reports	No Access	Not visible on reports page
All new medicine interventions for the pharmacy	No Access	Not visible on reports page
All open new medicine interventions	No Access	Not visible on reports page
Follow ups scheduled up to TODAY	No Access	Not visible on reports page
Follow ups scheduled up to 7 days from today	No Access	Not visible on reports page
Follow ups scheduled up to 14 days from today	No Access	Not visible on reports page
Follow ups scheduled up to 28 days from today	No Access	Not visible on reports page
Open new medicine interventions without any follow ups	No Access	Not visible on reports page
Completed new medicine interventions	No Access	Not visible on reports page

### 1.3.4 Change password on initial login

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

Figure 1-1: Update password page

**Note:** A user's initial password will have been delivered using secure stationery that is similar to 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 1-1)
- Click the "Change Password" button (Figure 1-1)

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 and one non-alphanumeric character (e.g. '&', '\*', etc.). This is similar to the password requirement for an NHS Mail account.

A password must be different to any 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.

## 1.4 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 actually located 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.

An icon may be present on the Windows desktop of the computer used for accessing the PCR association function; if an icon is not present then a link to the association page is present on the SHOW Community Pharmacy website:

<http://www.communitypharmacy.scot.nhs.uk>

Alternatively the following URL (website address) can be used to access the PCR association function:

<https://pcrua.mhs.scot.nhs.uk>

Further information on creating a PCR icon on the Windows desktop can be found in “Appendix B: Create PCR shortcut on desktop”.

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.

### 1.4.1 Perform an association

#### **Step 1 - Navigate to website and accept first security alert:**

- Navigate to the PCR association website
- In the “Security Alert” dialogue box Select “Yes” to allow the website to gain access to the digital certificate (Figure 1-2).

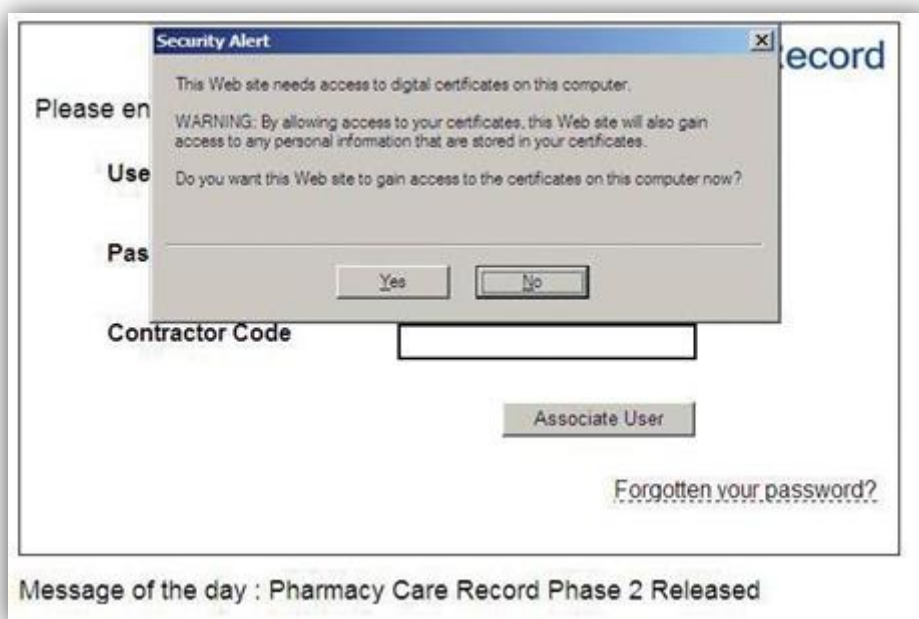


Figure 1-2: PCR association first security alert

**Step 2 - Enter user credentials:**

- Enter PCR User ID, Password and contractor code and select the "Associate User" button (Figure 1-3)

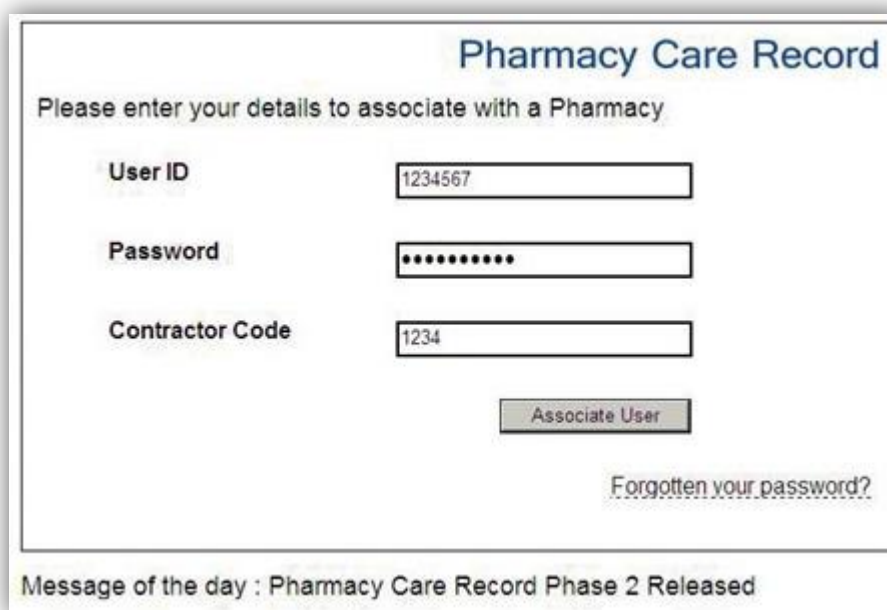
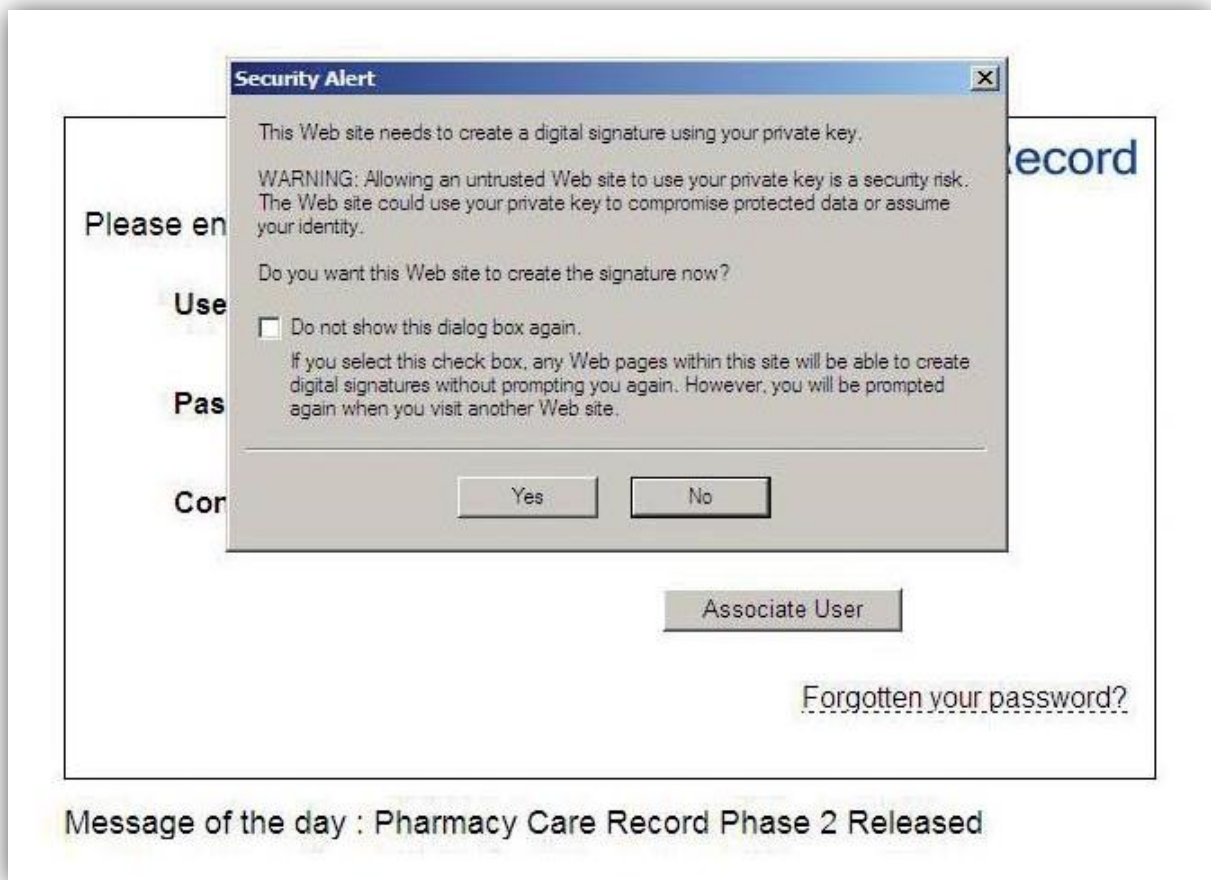


Figure 1-3: Associate User



**Step 3: Accept second security alert**

- In the “Security Alert” dialogue box, click “Yes” to accept the final security certificate (Figure 1-4)



**Figure 1-4: 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 message will be displayed in green text (Figure 1-5).

**Pharmacy Care Record**

Please enter your details to associate with a Pharmacy

**User ID (RPSGB / GPhC)**   
(for further information [click here](#))

**Password**

**Show password** ☐

**Contractor Code**

**Association has been created for TestUser to pharmacy 1234.**

[Click here to login to PCR](#) [Forgotten your password?](#)

*Authorised Users Only*

**Message Of The Day**  
 Welcome to Pharmacy Care Record

Figure 1-5: 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.

**Note:** From PCR Phase 8 a "Click here to log in to PCR" link is shown after successful association. Use this link to navigate to the PCR login page.

#### 1.4.2 Conditions that require a change of password after successful association

**On successful association, the system will prompt to change password if:**

- A new PCR user and associating for the first time
- Password has expired

**Note:** Learn how to perform a change of password at any time in section 2.2.6.

When a password has been changed the association page will be re-displayed and the association process will require to be repeated from step 2.

## 1.5 PCR Login process

### 1.5.1 Accessing PCR from a computer

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


- By following the link on the association page, Figure 1-5
- From a desktop shortcut on any PC in the pharmacy where you are working.
- Via the following URL: <https://pcr.mhs.scot.nhs.uk/>
- A link on the Community Pharmacy website

A desktop shortcut to PCR can be created if none exists (See, Appendix B: Create PCR shortcut on desktop).

### 1.5.2 Login to PCR

To login to PCR:

- Go to the Login page (Figure 1-6)
- Enter User ID and Password
- Click the “Login” button



Pharmacy Care Record

Please enter your details to login

User ID (RPSGB / GPhC)  
(for further information [click here](#)):

Password:

Login

[Forgotten your password?](#)

Authorised Users Only

Figure 1-6: Login page

- System displays the default landing page: either the “Search criteria” screen (Figure 1-7) or the “Pharmacy Home” page.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Mar 24, 2015 13:08

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

### Search criteria

[Set as default page](#)

Family name	<input type="text"/>
Given name	<input type="text"/>
Date of birth	<input type="text"/>
	<small>e.g: 31-07-2015 for the 31st of July 2015</small>
Postcode	<input type="text"/>
CHI	<input type="text"/>
	<input type="button" value="Search"/>

### Search results

Figure 1-7: "Search criteria" page

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

From PCR Phase 8 onwards, all date fields in PCR have a date picker function (As shown for date of birth field (above))

## 1.5.3 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 2 of this guide.

## 1.5.4 Login failure

If the login has failed, then the reason for failure will be displayed in **bold red text** (Figure 1-8). Examples of reasons for login failure include: incorrect password, incorrect User ID or no association for the user.

The screenshot shows the Pharmacy Care Record login interface. At the top, it says "Pharmacy Care Record". Below that, it says "Please enter your details to login". There are two input fields: "User ID:" with the value "7654321" and "Password:". A "Login" button is located to the right of the password field. Below the button, there is a link "Forgotten your password?". At the bottom, a red error message states: "Your user credentials are not currently associated with a Pharmacy".

Figure 1-8: Login failure example

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

## 1.5.5 Alternative login scenarios

## 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.

## Login from PMR application

Some pharmacy Patient Medication Record (PMR) systems have the ability to 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.

## Login after system timeout

When the automatic session timeout is triggered the screen will lock, Figure 1-9.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Jan 27, 2015 15:26

Pharmacy Care Record **NHS SCOTLAND**

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

**SMITH, Johnathan (Mr)** Born 03-Feb-2001 (13y 11m) Gender Male CHI No. 0302010017  
Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

Print Care Issues Edit

Pharmaceutical care plan High risk medicine assessments New medicine interventions Support tools

**Patient Profile**

**Named Pharmacist**  
**Additional Information**  
**General Health**  
**Medical Conditions**  
**Allergies and Sensitivities**  
**Diagnosed coeliac (historical)**  
**Gluten-free diet**  
**Complex dispensing patient**  
**Dispositions**

Patient has a

Compromised oral route of administration	Not Recorded	Detail available
Physical Impairment	Not Recorded	Detail available
Visual Impairment	Not Recorded	Detail available

**Organ function**

Patient has an impaired/compromised

Hepatic Function	Not Recorded	Detail available
Renal Function	Not Recorded	Detail available
Lung Function	Not Recorded	Detail available
Immune Status	Not Recorded	Detail available

**Maternal**

Patient is

Pregnant	Not Applicable	Detail available
Breast Feeding	Not Applicable	Detail available

**Pharmaceutical Care Plan Priority** **Not Recorded** Detail available

Patient Profile Last Modified:03-Dec-2008 by Initial User

Review/Edit

Figure 1-9: 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 1-10.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Jan 27, 2015 15:26

Pharmacy Care Record **NHS SCOTLAND**

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

**SMITH, Johnathan (Mr)** Born 03-Feb-2001 (13y 11m) Gender Male CHI No. 0302010017  
Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

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**Patient Profile**

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**Allergies and Sensitivities**  
**Diagnosed coeliac (historical)**  
**Gluten-free diet**  
**Complex dispensing patient**  
**Dispositions**

Patient has a

Compromised oral route of administration	Not Recorded	Detail available
Physical Impairment	Not Recorded	Detail available
Visual Impairment	Not Recorded	Detail available

**Organ function**

Patient has an impaired/compromised

Hepatic Function	Not Recorded	Detail available
Renal Function	Not Recorded	Detail available
Lung Function	Not Recorded	Detail available
Immune Status	Not Recorded	Detail available

**Maternal**

Patient is

Pregnant	Not Applicable	Detail available
Breast Feeding	Not Applicable	Detail available

**Pharmaceutical Care Plan Priority** **Not Recorded** Detail available

Patient Profile Last Modified:03-Dec-2008 by Initial User

Review/Edit

Figure 1-10: Lock screen error

To logout from the lock screen:

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

## 1.6 Technical environment

### 1.6.1 Accessing PCR

PCR has been tested for compatibility with Internet Explorer 6, 8 and 11.

PCR can be accessed from any computer within a Scottish community pharmacy that is connected to the N3 network (either directly or indirectly via an approved corporate network).



## 1.6.2 Saving changes in PCR

As PCR is a web application, 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.

## 1.7 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 1-11)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record 

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### Manage profile

[Manage my profile](#)

[Manage my reset password questions](#)

[Change password](#)

Figure 1-11: "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 1-12)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Oct 10, 2013 13:04

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

Manage Reset Password questions

Using the function below, you can configure "Reset Password" questions which will allow you to unlock or reset your password without contacting the helpdesk. You need to have 5 questions answered before you can use "Reset Password" functionality.

Question:

Answer:

▼

Question 6

Question 7

Question 8

Question 9

Question 10

Question 11

Question 12

Question 13

Question 14

Question 15

Question 16

Question 17

Question 18

Question 19

Question 20

Question		
Question 1		<a href="#">Delete</a>
Question 2		<a href="#">Delete</a>
Question 3		<a href="#">Delete</a>
Question 4	01-Dec-2009	<a href="#">Delete</a>
Question 5	01-Dec-2009	<a href="#">Delete</a>

Answered Questions: 5, Required Questions: 5

Figure 1-12: "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 1-13)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record 

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**Manage Reset Password questions**

Using the function below, you can configure "Reset Password" questions which will allow you to unlock or reset your password without contacting the helpdesk. You need to have 5 questions answered before you can use "Reset Password" functionality.

Question:

Answer:  ----- enter answer here

Add Answer ----- then click to add

**Questions already answered**

Question	Answer set on	
Question 1	01-Dec-2009	<a href="#">Delete</a>
Question 2	01-Dec-2009	<a href="#">Delete</a>
Question 3	01-Dec-2009	<a href="#">Delete</a>
Question 4	01-Dec-2009	<a href="#">Delete</a>
Question 5	01-Dec-2009	<a href="#">Delete</a>

Answered Questions: 5, Required Questions: 5

**Figure 1-13: 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).

1.8 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 1-14)

Pharmacy: 1234 - Pharmacy One

User: Testuser - Jane Smith

Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record



Search Protocols Reports Change password Manage profile Yellow card Help Logout

Manage Reset Password questions

Using the function below, you can configure "Reset Password" questions which will allow you to unlock or reset your password without contacting the helpdesk. You need to have 5 questions answered before you can use "Reset Password" functionality.

Question: Question 7

Answer:

Add Answer

Questions already answered

Question	Answer set on	
Question 1	01-Dec-2009	Delete
Question 2	01-Dec-2009	Delete
Question 3	01-Dec-2009	Delete
Question 4	01-Dec-2009	Delete
Question 5	01-Dec-2009	Delete

Answered Questions: 5, Required Questions: 5

Delete question link

Figure 1-14: Delete reset password question

## 1.9 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 1-15)



Figure 1-15 “forgotten your password” link

### Step 2 - Enter user details:

- Enter User ID and click the “Start” button (Figure 1-16)

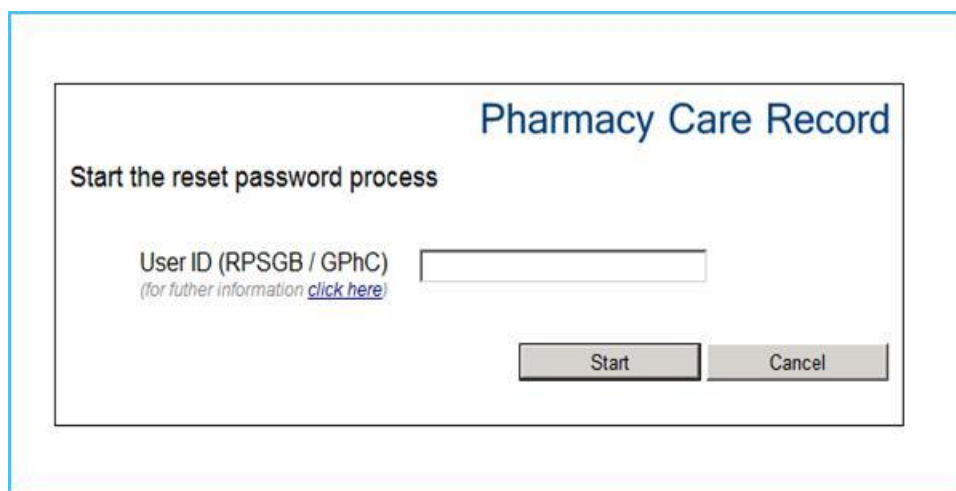
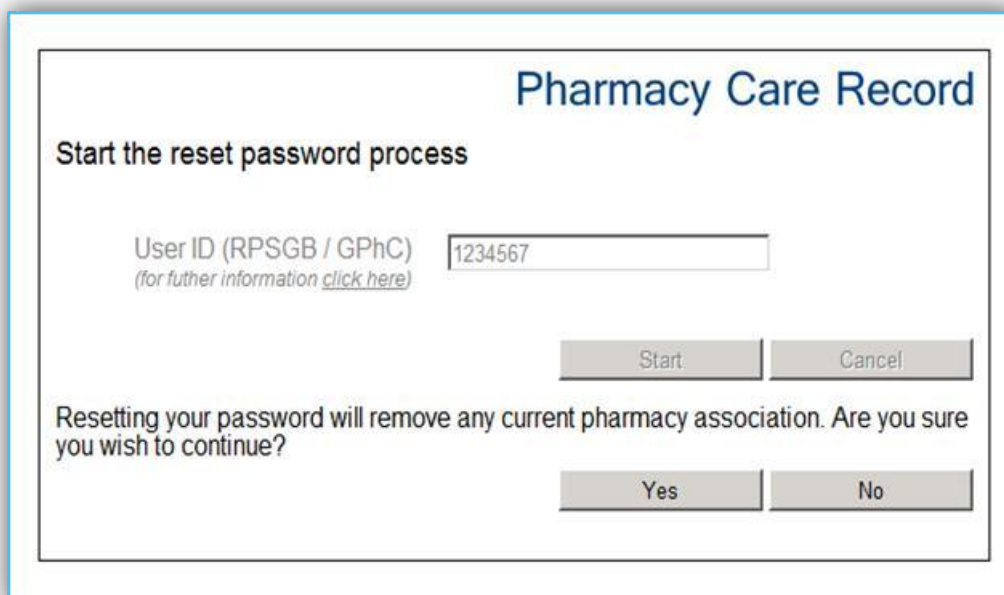


Figure 1-16: Start the reset password process

### Step 3 – Start the reset password process:

- Select “Yes” to continue and remove any associations [Selecting “No” will return to the login page] (Figure 1-17)

**Note:** Selecting the “Yes” button will remove an existing association and mandate the need to re-associate (See section 1.4).



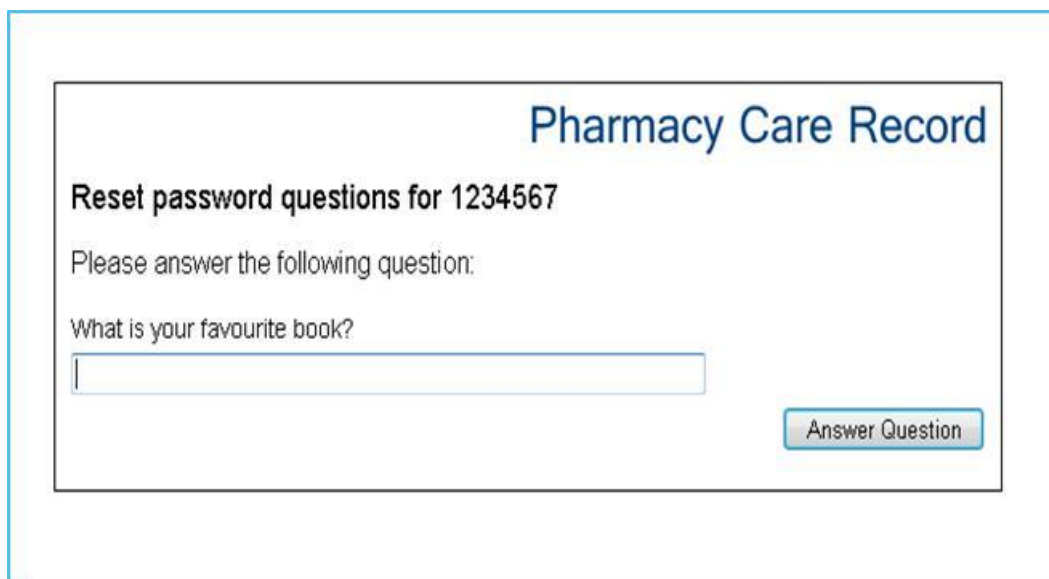
The screenshot shows a web interface titled "Pharmacy Care Record". Below the title, it says "Start the reset password process". There is a text input field for "User ID (RPSGB / GPhC)" with the value "1234567" entered. Below the input field, there is a link "(for further information [click here](#))". To the right of the input field are two buttons: "Start" and "Cancel". Below these buttons, there is a confirmation message: "Resetting your password will remove any current pharmacy association. Are you sure you wish to continue?". At the bottom right, there are two buttons: "Yes" and "No".

Figure 1-17: 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 1-18).

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



The screenshot shows a web interface titled "Pharmacy Care Record". Below the title, it says "Reset password questions for 1234567". There is a text input field for "Please answer the following question:". Below the input field, there is a question: "What is your favourite book?". To the right of the input field is a button: "Answer Question".


Figure 1-18: 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 1-19)

The screenshot shows a web form titled "Pharmacy Care Record" in blue text at the top right. Below the title, on the left, is the text "Set password for testuser". The form contains two input fields: "New password:" and "Confirm password:". To the right of the "Confirm password:" label is a "Set Password" button. The entire form is enclosed in a thin black border.

**Figure 1-19: Set password**

**Note:** The new password must meet the minimum security standard of 8 characters including at least one digit and one non-alphanumeric character (e.g. '&', '\*', etc.). If the password entered is the same as any 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 into the reset password process does not force you to change your password if you then remember your current password.

## 1.10 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.

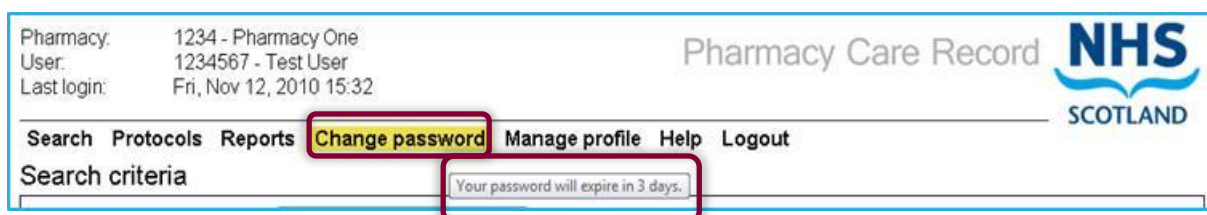


Figure 1-20: Expiring password warning

## 1.11 Last login date and time

For security, the last login date and time is displayed in PCR (Figure 1-21)

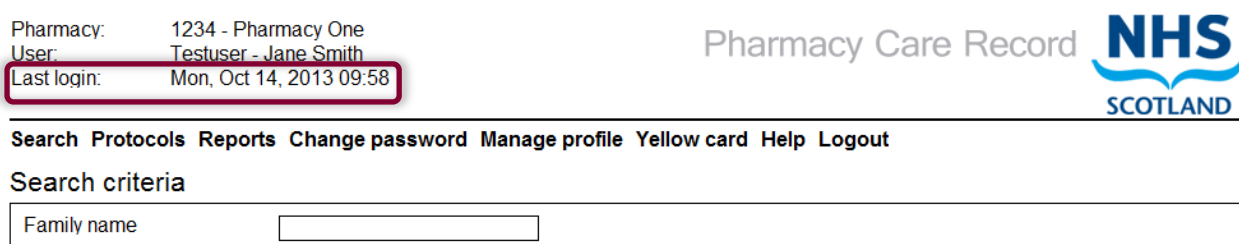


Figure 1-21 Last login date and time

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

## 2 High-level menu functions

### 2.1 Overview

The PCR high-level menu contains links to other PCR functions (Figure 2-1). These links are not patient specific but give access to pharmacy-wide functions.

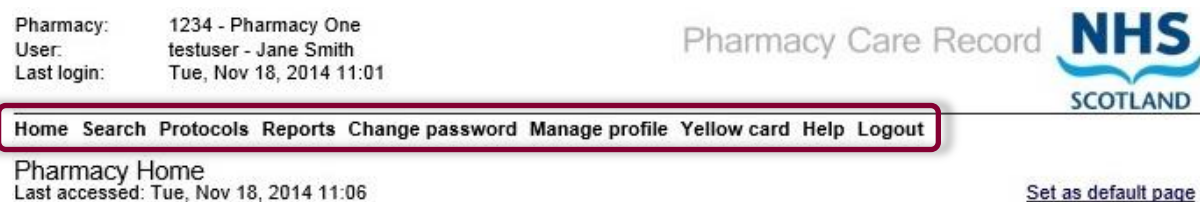


Figure 2-1: PCR high level menu

**Note:** As PCR is a web-based application, clicking on any high-level menu option will immediately open the relevant PCR page. Any unsaved changes made in a previous screen will be lost.

### 2.2 Menu functions

#### 2.2.1 Home

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

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Thu, Mar 3, 2016 21:17

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

## Pharmacy Home

Last accessed: Thu, Mar 3, 2016 21:18

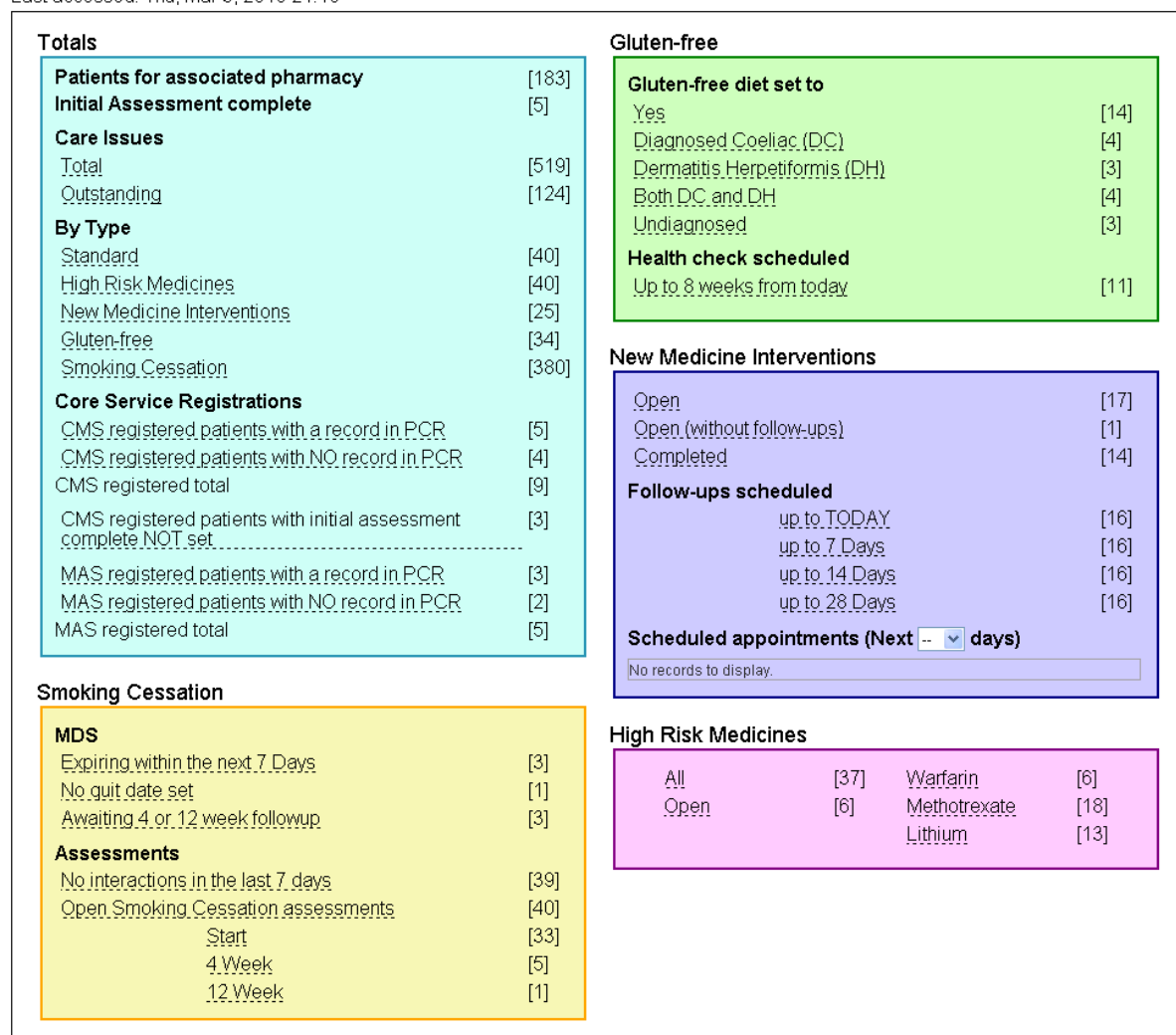


Figure 2-2: Pharmacy Home (Pharmacist View)

Pharmacy: 1234 - Pharmacy One  
 User: TestTechnicianUser - Jose Smith  
 Last login: Thu, Nov 6, 2014 13:29

[Home](#) [Search](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

## Pharmacy Home

Last accessed: Tue, Nov 18, 2014 11:09

[Set as default page](#)

Totals		Gluten-free	
<b>Patients</b>	[1]	<b>Gluten-free diet set to</b>	
<b>Initial Assessment complete</b>	[0]	<b>Yes</b>	[0]
<b>Care Issues</b>		<b>Diagnosed Coeliac (DC)</b>	[0]
<b>Total</b>	[0]	<b>Dermatitis Herpetiformis (DH)</b>	[0]
<b>Outstanding</b>	[0]	<b>Both DC and DH</b>	[0]
<b>By Type</b>		<b>Undiagnosed</b>	[0]
<b>Gluten-free</b>	[0]	<b>Health check scheduled</b>	
<b>Smoking Cessation</b>	[0]	<b>Up to 8 weeks from today</b>	[0]

Smoking Cessation	
<b>MDS</b>	
<b>Expiring within the next 7 Days</b>	[0]
<b>No quit date set</b>	[0]
<b>Awaiting 4 or 12 week followup</b>	[0]
<b>Assessments</b>	
<b>No interactions in the last 7 days</b>	[0]
<b>Open Smoking Cessation assessments</b>	[0]
<b>Start</b>	[0]
<b>4 Week</b>	[0]
<b>12 Week</b>	[0]

Figure 2-3: Pharmacy Home (Pharmacy Technician View)

A full description of information and functions on the Pharmacy home page is described in section 3.


## 2.2.2 Search

Selecting the “Search” menu will display the “Search criteria” page (Figure 2-4)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Oct 22, 2013 13:43

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Hospital](#) [Logout](#)

## Search criteria

Family name	<input type="text"/>
Given name	<input type="text"/>
Date of birth	<input type="text"/> 
	<small>e.g: 31-07-2013 for the 31st of July 2013</small>
Postcode	<input type="text"/>
CHI	<input type="text"/>
<input type="button" value="Search"/>	

## Search results

Figure 2-4: Search criteria page

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

## 2.2.4 Protocols

The “Protocols” menu is intended to be used to list the CMS disease protocols (Figure 2-5: Protocols.). However, at present there are no protocols available in PCR.



Figure 2-5: Protocols

## 2.2.5 Reports

Select the “Reports” menu to view a list of reports available to the user. Reports are explained in section 10 of this guide.

### Reports

<b>Care issue and patient report</b>	
Outstanding care issues	
Patient report for associated pharmacy	
<b>Core service registrations reports</b>	
<b>CMS</b>	
CMS registered patients with a record in PCR	[5]
CMS registered patients with NO record in PCR	[4]
CMS registered patients with initial assessment complete set	[2]
CMS registered patients with initial assessment complete NOT set	[3]
<b>MAS</b>	
MAS registered patients with a record in PCR	[3]
MAS registered patients with NO record in PCR	[2]
MAS lapsed patients with a record in PCR	[3]
MAS lapsed patients with NO record in PCR	[2]
MAS registered and MAS lapsed patients with a record in PCR	[6]
<b>Care issues</b>	
Open care issues with review date set	[126]
Open care issues with reviews due in next 7 days	[39]
Open care issues with reviews due in next 14 days	[39]
Open care issues with reviews outstanding	[85]
Open care issues with no outcome ever recorded	[34]
Open care issues with no review date set	[10]
<b>New medicine intervention support tool reports</b>	
All new medicine interventions for the pharmacy	[31]

Figure 2-6: Reports Page Example

## 2.2.6 Change password

Selecting this function will display the change password page (Figure 2-7).

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Apr 3, 2012 10:36

Pharmacy Care Record 

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

### Change password

Current password	<input type="password"/>
New password	<input type="password"/>
Confirm password	<input type="password"/>
<input type="button" value="Change password"/> <input type="button" value="Cancel"/>	

**Figure 2-7: Change password page**

The change password function can be used at any time.

## 2.2.7 Manage profile

Use this function to access links to manage details relating to the user's profile, password reset questions and also a link to the change password functionality (Figure 2-8).

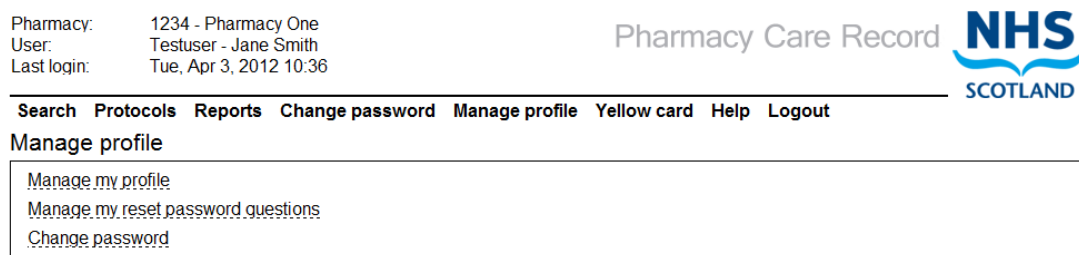


Figure 2-8: available options on “Manage profile” page

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 2-9)

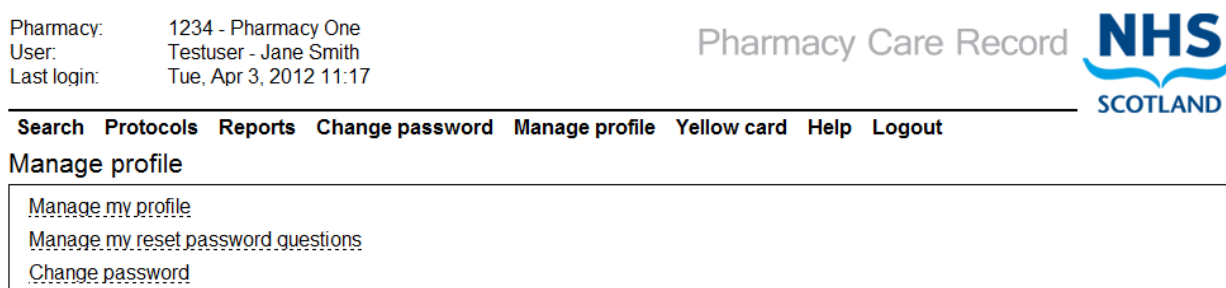


Figure 2-9: Manage profile options

### Step 2 - edit profile details:

- The Pharmacist Profile page will now be displayed (Figure 2-10)

*User options:*

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



Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Mon, Mar 26, 2012 15:46

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Help](#) [Logout](#)

**Pharmacist Profile**\* Means a field requires data

User ID (RPSGB / GPhC)  
(for further information [click here](#))

Testuser

Title

Given Name

Jane\*

Middle Name/Initial

Family Name

Smith\*

Email Address

Display

Jane Smith\*

Save

Cancel

Figure 2-10: 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 1.7

### 2.2.9 Yellow Card

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

**YellowCard**

Enter Keyword(s) to Search

[Home](#) [About Yellow Card](#) [Downloads](#) [Contact Us](#)

**Welcome to the reporting site for the Yellow Card Scheme**

Report a suspected problem or incident:

Side effect to a medicine, vaccine, herbal or homeopathic remedy **Side effects**

Medical device adverse incident **Devices**

Defective medicine (not of an acceptable quality) **Defective**

Counterfeit or fake medicine or medical device **Fake**

? Not sure which option to select? Help us guide you

**We cannot give you medical advice. If you are worried about your health:**

1. Talk to your doctor, pharmacist or nurse
2. Call the NHS
  - NHS 111 in England and Scotland on 111 (textphone 18001 111)
  - NHS Direct Wales/Galw IECHYD Cymru on 0845 46 47 (textphone 0845 606 46 47)
  - [NHS Northern Ireland](#)

Always read the patient information leaflet, or instruction supplied with your medicine or medical device. It lists the known side effects or problems and advises you on what to do.

**Welcome to the MHRA's new reporting site**

The Yellow Card Scheme now supports the reporting of all suspected problems or incidents to all healthcare products, not just suspected side effects to medicines

If you would like to comment on our website or report a technical problem please [contact us](#)

**Already Registered?**

If you have already registered with this site, please login.

Email Address:

Password:

[Forgotten your Password?](#) **Login**

**Register**

You can register on the Yellow Card reporting site when you submit a report, or you can register in advance.

**Register**

[Stay connected with the MHRA](#)

© Crown Copyright 2016 [Sitemap](#)


**MHRA**  
Regulating Medicines and Medical Devices

Figure 2-11: MHRA YellowCard website

## 2.2.10 Help

Select this option to view help related information that includes support contact details and a link to this user guide (Figure 2-12).

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Fri, May 1, 2015 14:12

Pharmacy Care Record 

---

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

Help

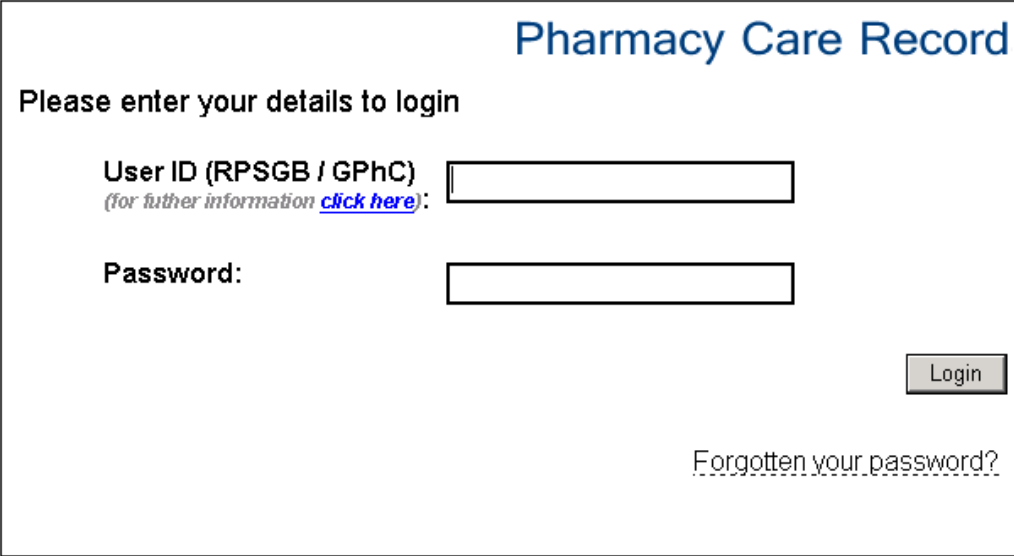
Contact Details	Please contact us at: Tel: 0131 275 6600 or email us : <a href="mailto:nss.psdhelp@nhs.net">nss.psdhelp@nhs.net</a>
User Guide	<a href="#">View Guide</a> For additional information on PCR and eCMS please see the <a href="#">Quick Reference</a> guide.  For guidance on the PCR system, including High Risk Medicine assessments and New Medicine Interventions, please see the <a href="#">PCR User Guide</a> .  The reference guide and supplementary user guide are in a format called PDF. If you cannot open these documents please contact either your pharmacy system supplier or IT support. Alternatively if your system allows, a viewer (Adobe Acrobat Reader) can be downloaded and installed onto most PCs. <a href="#">Click here</a> to go to the Adobe Acrobat Reader website.

Figure 2-12: PCR help information with link to user guide

The help page also includes information about installing Adobe Reader.

### 2.2.12 Logout

Selecting the logout option from the high level menu will logout the current user and display the login page (Figure 2-13)



The screenshot shows a web page titled "Pharmacy Care Record" in a large blue font at the top right. Below the title, the text "Please enter your details to login" is displayed. There are two input fields: the first is labeled "User ID (RPSGB / GPhC)" with a subtext "(for further information [click here](#)):" and the second is labeled "Password:". To the right of the password field is a grey "Login" button. Below the button, the text "Forgotten your password?" is visible. At the bottom left of the page, the text "Authorised Users Only" is displayed.

Pharmacy Care Record

Please enter your details to login

User ID (RPSGB / GPhC)  
(for further information [click here](#)):

Password:

Login

Forgotten your password?

Authorised Users Only

Figure 2-13: Login page displayed after logout has been selected

## 3 Pharmacy Home

### 3.1 Overview

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

A Pharmacy Technician can only view Gluten-free and Smoking Cessation "Totals".

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Thu, Mar 3, 2016 21:17

Pharmacy Care Record 

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### Pharmacy Home

Last accessed: Thu, Mar 3, 2016 21:18

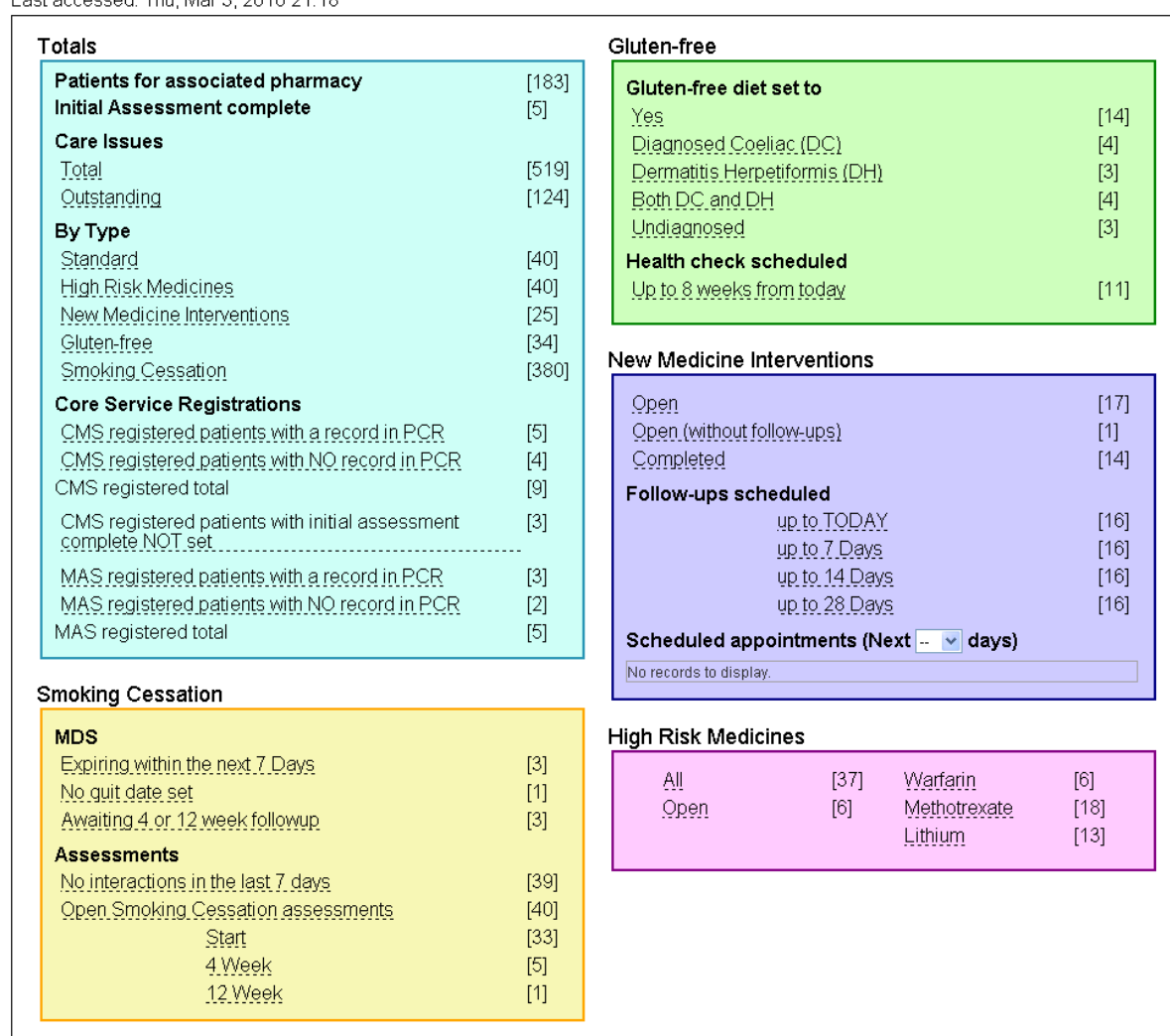


Figure 3-1: Pharmacy Home (Pharmacist View)

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

## 3.2 Totals

- Patients for associated pharmacy
- Initial assessment complete (Where initial assessment is set to 'complete')

### Care Issues

- Total
- Outstanding

### By Type

(Care issues by type)

- Standard
- High risk medicines
- New medicine interventions
- Gluten-free
- Smoking cessation

### Core service registrations

- CMS registered patients with a record in PCR
- CMS registered patients with NO record in PCR
  - CMS registered total
- CMS registered patients with initial assessment complete NOT set
- MAS registered patients with a record in PCR
- MAS registered patient with NO record in PCR
  - MAS registered total

## 3.3 Smoking Cessation

MDS

- 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

## 3.4 Gluten-free

- Yes
- Diagnosed coeliac (DC)
- Dermatitis Herpetiformis (DH)

## 3.5 High Risk Medicines

- All
- Open
- Warfarin
- Methotrexate
- Lithium

### 3.6 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

## 4 Search for and create patient records

### 4.1 Overview

The Search criteria page (Figure 4-1) 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 Post Code can also be entered to limit the number of records returned.

Searches are not case sensitive.


Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Mar 3, 2015 15:47

Pharmacy Care Record


---

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

Search criteria
[Set as default page](#)

Family name	<input type="text"/>
Given name	<input type="text"/>
Date of birth	<input type="text"/>  <small>e.g. 31-07-2015 for the 31st of July 2015</small>
Postcode	<input type="text"/>
CHI	<input type="text"/>
<input type="button" value="Search"/>	

Search results

Figure 4-1: 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).



## 4.2 Using the search function

### To search for a patient:

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

#### 4.2.1 If the search is successful

- A list of records that match your criteria will be displayed (Figure 4-2)

#### 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


Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Tue, Mar 24, 2015 13:08

Pharmacy Care Record 

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### Search criteria

[Set as default page](#)

Family name	<input type="text"/>
Given name	<input type="text"/>
Date of birth	<input type="text"/> 
	<small>e.g: 31-07-2015 for the 31st of July 2015</small>
Postcode	<input type="text"/>
CHI	<input type="text"/>
	<input type="button" value="Search"/>

#### Search results

If you were looking for another person please change your search criteria.  
If you are sure the person has no record, [click here](#) to create a new record.

Patient Name	Date of Birth	CHI	Post Code	
Mr John SCOne	18-Nov-1988	1811880010	EH1 3RJ	<a href="#">View</a>
Jonathan Smith	20-Mar-1968	2222222222		<a href="#">View</a>

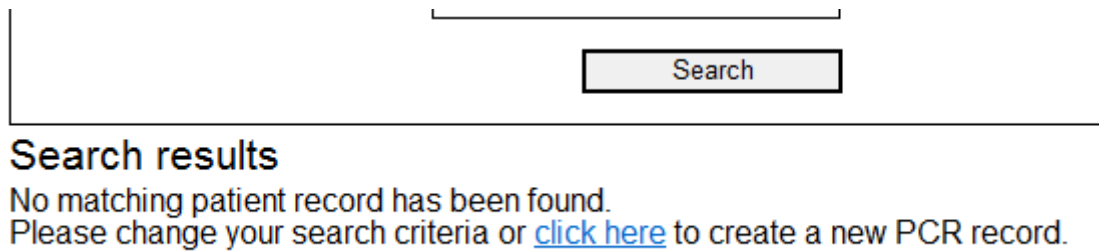
Figure 4-2: Search results list

#### 4.2.2 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 4-3)

*User options:*

- Search again using different search criteria; or
- Use the “click here” link to create a new PCR record (Figure 4-3)



Search

### Search results

No matching patient record has been found.  
Please change your search criteria or [click here](#) to create a new PCR record.

Figure 4-3: No matching patient records found


Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Tue, Mar 24, 2015 13:08

Pharmacy Care Record **NHS**  
SCOTLAND

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### Search criteria

[Set as default page](#)

Family name	<input type="text" value="McDonald"/>
Given name	<input type="text"/>
Date of birth	<input type="text"/> 
	<small>e.g: 31-07-2015 for the 31st of July 2015</small>
Postcode	<input type="text"/>
CHI	<input type="text"/>
	<input type="button" value="Search"/>

#### Search results

No matching patient record has been found.  
Please change your search criteria or [click here](#) to create a new PCR record.

Figure 4-4: No matching patient records found

## 4.3 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 4-4)
- a patient search has completed and the searched for patient is not listed (Figure 4-4)
- **Note:** [Section 11 of this User Guide details the process for creating a patient record using the patient interface functionality between your PMR application and PCR.]

### 4.3.1 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 4-5)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Jun 3, 2014 11:28

Pharmacy Care Record 

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### Patient Details

#### Patient Demographics

\* Means a field requires data

CHI  \*

Given name  Mandatory for CHI search \*

Preferred name

Date of birth  Mandatory for CHI search \*  
e.g: 31-07-2013 for the 31st of July 2013

Title

Family name  \*

Gender

Patient Deceased ☐

#### Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode  Mandatory for CHI search

#### Contact Details

Home phone number

Mobile phone number

Work phone number

Email address

**Figure 4-5: Patient details**

- Enter the patient details
- Select the “Save” button\*, the patient home will be displayed (Figure 4-10). 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.

### 4.3.2 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 4-6. (using greyed-out text “Mandatory for CHI search” within the text input boxes)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Jun 9, 2014 16:01

Pharmacy Care Record **NHS**  
 SCOTLAND

---

Search Protocols Reports Change password Manage profile Yellow card Help Logout

#### Patient Details

##### Patient Demographics

CHI  \*

Given name  \*

Preferred name

Date of birth  \*

e.g. 31-07-2013 for the 31st of July 2013

Title

Family name  \*

Gender  ▼

Patient Deceased ☐

##### Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode

##### Contact Details

Home phone number

Mobile phone number

Work phone number

Email address

Figure 4-6: 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 4-7.

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

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, May 29, 2014 13:46

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

### Patient Details

**Patient Demographics** \* Means a field requires data

CHI  \*  Title

Given name  \* Family name  \*

Preferred name

Date of birth  \* Gender  \*

e.g: 31-07-2013 for the 31st of July 2013

Patient Deceased ☐

**Patient Address**

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode

**Contact Details**

Home phone number

Mobile phone number

Work phone number

Email address

Figure 4-7: Unique Match Found

- If more than one match is found on the CHI system a message will display advising to review search criteria, Figure 4-8

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, May 29, 2014 13:46

Pharmacy Care Record **NHS**  
SCOTLAND

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**Patient Details**

**Patient Demographics** \* Means a field requires data

CHI  \*  Title

Given name  \* Family name  \*

Preferred name

Date of birth  \* Gender  \*

e.g: 31-07-2013 for the 31st of July 2013

Patient Deceased ☐

**Patient Address**

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode

**More than one match found**

Please review your search criteria.

Figure 4-8: 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 4-9.

The screenshot displays the Pharmacy Care Record NHS Scotland interface. At the top, it shows the Pharmacy (1234 - Pharmacy One), User (Testuser - Jane Smith), and Last login (Thu, May 29, 2014 13:46). The main navigation bar includes links for Search, Protocols, Reports, Change password, Manage profile, Yellow card, Help, and Logout. The 'Patient Details' section is active, showing fields for Patient Demographics and Patient Address. A modal dialog box with a red border is centered on the screen, displaying the message 'No match found' and 'Please review your search criteria.' with an 'OK' button. The background form shows fields for CHI, Given name (Nomatch), Preferred name, Date of birth (20-08-1979), Title, Family name (Williams), Gender (Male), and Patient Deceased. A red asterisk indicates a required field. The bottom right corner has 'Save' and 'Cancel' buttons.

Figure 4-9: 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.

#### 4.4 View Patient details

Once a patient has been selected or newly created via the search process the patient home is displayed, Figure 4-10. 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 bases 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 CMS or MAS core services. An icon for MAS lapsed may also be displayed. The default view can be expanded to also show the address and contact information for the patient.

Pharmacy: 1234 - Pharmacy 1234		Pharmacy Care Record		NHS SCOTLAND
User: Testuser - Jane Smith				
Last login: Wed, Dec 30, 2015 14:36				
Home Search Protocols Reports Change password Manage profile Yellow card Help Logout				
<b>WILLIAMS, Fern</b>		Born <b>05-May-1985 (30y)</b> Gender <b>Female</b> CHI No. <b>777777777</b>		
<b>MAS</b>		Patient Details Last Modified On <b>30-Dec-2015</b> By <b>Testuser</b>		
Address		Phone and email		
Print Care Issues Edit				
<div> <span>Pharmaceutical care plan</span> <span>High risk medicine assessments</span> <span>New medicine interventions</span> <span>Support tools</span> </div>				
<b>Patient Profile</b> <span>Show less detail ^</span>				
<b>Named Pharmacist</b>				
<b>Additional Information</b>				
<b>General Health</b>				
<b>Medical Conditions</b>				
<b>Allergies and Sensitivities</b>				
<b>Diagnosed coeliac (historical)</b>	Not Recorded			
<b>Gluten-free diet</b>	Not Recorded			
<b>Complex dispensing patient</b>	Not Recorded			
<b>Dispositions</b>				
Patient has a	Compromised oral route of administration	Not Recorded		
	Physical Impairment	Not Recorded		
	Visual Impairment	Not Recorded		
<b>Organ function</b>				
Patient has an impaired/compromised	Hepatic Function	Not Recorded		
	Renal Function	Not Recorded		
	Lung Function	Not Recorded		
	Immune Status	Not Recorded		
<b>Maternal</b>				
Patient is	Pregnant	Not Recorded		
	Breast Feeding	Not Recorded		
<b>Pharmaceutical Care Plan Priority</b>	<b>Not Recorded</b>			
Patient Profile Last Modified: 14-Dec-2015 by testuser				

**Figure 4-10: Patient Home page**

To show/hide the patient address and contact details, Figure 4-11, select the arrow on the right hand side of the patient home page.

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Jan 29, 2016 15:44

Pharmacy Care Record **NHS**  
 SCOTLAND

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

<b>JAMAL, Jil</b>		Born <b>11-Jul-1988 (27y)</b> Gender <b>Female</b> CHI No. <b>1107880122</b>	
<b>CMS</b>		Patient Details Last Modified On <b>15-Dec-2015</b> By <b>testuser</b>	
Address <b>12 Jamal Road, Jameston, NULL, JA3 3JJ</b>		Phone and email <b>01357 246 357</b>	
<a href="#">Pharmaceutical care plan</a> <a href="#">Link with medicines assessments</a> <a href="#">New medicines interventions</a> <a href="#">Support tools</a>		<a href="#">Print Care Issues</a> <a href="#">Edit</a>	

Click to expand or collapse

{Show}

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Jan 29, 2016 15:44

Pharmacy Care Record **NHS**  
 SCOTLAND

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

<b>JAMAL, Jil</b>		Born <b>11-Jul-1988 (27y)</b> Gender <b>Female</b> CHI No. <b>1107880122</b>	
<b>CMS</b>		Patient Details Last Modified On <b>15-Dec-2015</b> By <b>testuser</b>	
Address <b>12 Jamal Road, Jameston, NULL, JA3 3JJ</b>		Phone and email <b>01357 246 357</b>	
Usual address <b>12 Jamal Road</b> <b>Jameston</b> <b>NULL</b> <b>JA3 3JJ</b>		Home <b>01357 246 357</b> Work Mobile Email	
		<a href="#">Print Care Issues</a> <a href="#">Edit</a>	

{Hide}

Figure 4-11: Show/hide patient address and contact details



## 4.5 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 4-12)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 3, 2012 11:37

Pharmacy Care Record **NHS**  
SCOTLAND

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

### Patient Details

\* Means a field requires data

<b>Patient Demographics</b>	
CHI <input type="text" value="0102031231"/> *	Title <input type="text" value="Mr"/>
Given name <input type="text" value="Johnathan"/> *	Family name <input type="text" value="Smith"/> *
Preferred name <input type="text" value="John"/>	Gender <input type="text" value="Male"/>
Date of birth <input type="text" value="03-02-2001"/> * <small>e.g: 01-05-2010 for the 1st of May 2010</small>	Patient Deceased <input type="checkbox"/>
<b>Patient Address</b>	
Address 1 <input type="text" value="3 Appleton Parkway"/>	<b>Contact Details</b>
Address 2 <input type="text" value="Livingston"/>	Home phone number <input type="text" value="01506 000-000"/>
Address 3 <input type="text" value="West Lothian"/>	Mobile phone number <input type="text" value="0777 000-000"/>
Address 4 <input type="text" value="UK"/>	Work phone number <input type="text"/>
Address 5 <input type="text"/>	Email address <input type="text" value="JohnSmith@home.com"/>
Postcode <input type="text" value="EH54 7EZ"/>	

Figure 4-12: 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 “\*”. ( The “Find CHI” button is not displayed on the edit page.)

## 5 Pharmaceutical care plans

### 5.1 Overview

The patient home page, Figure 5-1, 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 4) a "blank" PCP is automatically created.

There are four main sections in the PCP:

- Patient Profile
- Pharmaceutical Care Risk Assessment
- Care Issues (includes Care Issue, Outcomes and Actions)
- Medication
- Core Service Registrations

The NES Chronic Medication Service Implementation Resource Pack 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.

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Wed, Feb 3, 2016 15:24

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**HEPPLE, Ann** *Born 18-Nov-1930 (85y) Gender Female CHI No. 1811301223*  
**CMS** **MAS** **LAPSED** *Patient Details Last Modified On 15-Dec-2015 By testuser*  
 Address **8 Hepple Place, HH1 1HH** *Phone and email 01357 246357*

[Print Care Issues](#) [Edit](#)

Pharmaceutical care plan	High risk medicine assessments	New medicine interventions	Support tools														
<b>Patient Profile</b> <span>Show less detail ^</span>																	
<b>Named Pharmacist</b> <b>Additional Information</b> <b>General Health</b> <b>Medical Conditions</b> <b>Allergies and Sensitivities</b> <b>Diagnosed coeliac (historical)</b> Not Recorded <b>Gluten-free diet</b> Not Recorded <b>Complex dispensing patient</b> Not Recorded <b>Dispositions</b> Patient has a Compromised oral route of administration Not Recorded Physical Impairment Not Recorded Visual Impairment Not Recorded <b>Organ function</b> Patient has an impaired/compromised Hepatic Function Not Recorded Renal Function Not Recorded Lung Function Not Recorded Immune Status Not Recorded <b>Maternal</b> Patient is Pregnant Not Recorded Breast Feeding Not Recorded <b>Pharmaceutical Care Plan Priority</b> <b>Not Recorded</b> <div style="text-align: right;">Patient Profile Last Modified: 14-Dec-2015 by testuser</div>																	
<a href="#">Review/Edit</a>																	
<b>Pharmaceutical Care Risk Assessment</b>																	
<table border="1"> <thead> <tr> <th>Review date</th> <th>Review user</th> <th>Care issues?</th> </tr> </thead> <tbody> <tr> <td colspan="3">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;"><a href="#">Add</a></div>				Review date	Review user	Care issues?	No records to display.										
Review date	Review user	Care issues?															
No records to display.																	
<b>Care Issues</b>																	
<table border="1"> <thead> <tr> <th>Care issue</th> <th>Care issue type</th> <th>Earliest review by</th> <th>Last modified on</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;">[0 of 0] <a href="#">Review</a></div>				Care issue	Care issue type	Earliest review by	Last modified on	No records to display.									
Care issue	Care issue type	Earliest review by	Last modified on														
No records to display.																	
<b>Medication</b>																	
<table border="1"> <thead> <tr> <th>Name</th> <th>Last dispensed on</th> <th>Service</th> <th>Indication</th> <th>Modified date</th> <th>Modified by</th> <th>Imported</th> </tr> </thead> <tbody> <tr> <td colspan="7">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;">[0 of 0] <a href="#">Review</a></div>				Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	No records to display.						
Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported											
No records to display.																	
<b>Core Service Registrations</b>																	
<table border="1"> <thead> <tr> <th>Service</th> <th>Registration status</th> <th>Registration status effective from</th> <th>Last update received</th> </tr> </thead> <tbody> <tr> <td>CMS</td> <td>Registered</td> <td>03-May-2015</td> <td>29-Jan-2016</td> </tr> <tr> <td>MAS</td> <td>Lapsed</td> <td>05-May-2015</td> <td>29-Jan-2016</td> </tr> </tbody> </table>				Service	Registration status	Registration status effective from	Last update received	CMS	Registered	03-May-2015	29-Jan-2016	MAS	Lapsed	05-May-2015	29-Jan-2016		
Service	Registration status	Registration status effective from	Last update received														
CMS	Registered	03-May-2015	29-Jan-2016														
MAS	Lapsed	05-May-2015	29-Jan-2016														

Figure 5-1: Patient Home

## 5.2 Patient profile

The patient profile section of the patient home page (Figure 5-1) is used to record specific information about a patient's health.

The patient profile contains the following information:

- Named Pharmacist (responsible for Pharmaceutical Care Plan)
- Additional Details (of named pharmacist)
- General Health
- Medical Conditions
- Allergies and sensitivities
- Diagnosed coeliac (Historical)
- Gluten-free diet
- Complex dispensing patient
  - Is the patient a complex dispensing patient?
  - Complex dispensing subcategories (If signified as complex dispensing patient)

### Patient Factors

- Dispositions
  - Compromised oral route of administration
  - Physical impairment
  - Visual impairment
- Organ function
  - Hepatic function
  - Renal function
  - Lung function
  - Immune system
- Maternal
  - Pregnant
  - Breast Feeding
  - Notes
- Pharmaceutical Care Plan Priority
  - PCP Priority
  - Notes
- Initial assessment complete

- Initial assessment complete (checkbox)

### **Named Pharmacist responsible for Pharmaceutical Care Plan**

Contains details of the pharmacist who is responsible for the patient's PCP and any specific contact details for the pharmacist. Text can be entered with line breaks by using the "Enter" key.

### **Patient Profile**

Record information about the patients general health, medical conditions and allergies.

### **Diagnosed Coeliac (historical)**

"Diagnosed Coeliac" was used in previous versions of PCR. As not all patients that are following a Gluten-free diet are Diagnosed Coeliac It has been marked as "historical" and superseded by "Gluten-free diet". The "Diagnosed Coeliac (historical)" is for informational purposes and is read only.

### **Gluten-free diet**

Use this section to signify if patient is following a gluten-free diet, how many units they have allocated based on guidelines and if the number of units is dietitian advised. The gluten-free diet options are.

- Not Recorded *(default option)*
- No
- Diagnosed coeliac
- Diagnosed coeliac and Dermatitis Herpetiformis
- Dermatitis Herpetiformis
- Undiagnosed

### **Complex dispensing patient**

Use this option to signify if a patient is identified as a complex dispensing patient. Options are Yes, No or Not recorded (Default). If "Yes" is selected, one or more of the five sub categories must be selected:

- Monitored dosage system required by pharmacist
- Monitored dosage system requested by prescriber / social services / hospital
- Other adherence support required (e.g. MAR sheet)
- Instalment dispensing requested by prescriber
- Special monitoring and feedback required

### **Patient Factors: Dispositions, Organ function, Maternal**

Record any relevant patient factors. This can include information about impaired organ function or visual impairment – marking each of the factors as 'Yes', 'No', 'Not Applicable' or 'Not Recorded'. Notes text associated with each patient factor can be entered.

### **Pharmaceutical Care Plan Priority (PCP)**

A PCP priority can be recorded to assist with the recording of a Care Plan Priorities (Figure 5-2). Possible values for PCR Priority are:

- Not Recorded (Default value)

- Low
- Medium
- High
- Not Required

Pharmaceutical care plan priority

PCP Priority: Not Recorded

Notes

Initial assessment complete: ☐

Save Cancel

Figure 5-2: PCP Priority

### Initial assessment complete checkbox

The Initial assessment complete checkbox allows a positive indicator to be set that identifies when the patient's initial assessment has been completed.

**Note:** The Initial assessment complete box can only be checked if the PCP Priority has been changed from the default value of "Not Recorded".

Once the Initial assessment complete box has been checked and the patient's PCR recorded saved the box cannot be unchecked.

To edit the patient profile, Select "Review/Edit" link from the patient home page (Figure 5-3), the patient profile edit page is displayed (Figure 5-4).

**maternal**

Patient is Pregnant Not Applicable Detail available

Breast Feeding Not Applicable Detail available

**Pharmaceutical Care Plan Priority** **Not Recorded** Detail available

Patient Profile Last Modified:03-Dec-2008 by Initial User

Review/Edit

**Pharmaceutical Care Risk Assessment**

Review date	Review user	Care issues?	
05-May-2005	InitialUser	No	<a href="#">View</a>
04-Apr-2004	InitialUser	No	<a href="#">View</a>
03-Mar-2003	InitialUser	No	<a href="#">View</a>
02-Feb-2002	InitialUser	No	<a href="#">View</a>
01-Jan-2001	InitialUser	No	<a href="#">View</a>

Add

Care Issues

Figure 5-3: "Review / Edit" Patient Profile

Named pharmacist responsible for pharmaceutical care plan	
Name:	<input type="text" value="Pharmacist A"/> <div>Additional Information (e.g. contact details): <input type="text" value="Pharmacist A Information"/></div>
Patient profile	
General health:	<input type="text" value="Poor health"/>
Medical conditions:	<input type="text" value="Asthma"/>
Allergies and sensitivities:	<input type="text" value="allergic rhinitis"/>
Patient factors : Dispositions	
Compromised oral route of administration:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Physical impairment:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Visual impairment:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Patient factors : Organ function	
Hepatic function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Renal function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Lung function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>
Immune status:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input type="text"/>

**Patient factors : Maternal**

Pregnant: ☐ Yes ☐ No ☐ Not Applicable ☒ Not Recorded

Notes

Breast feeding: ☐ Yes ☐ No ☐ Not Applicable ☒ Not Recorded

Notes

**Gluten-free**

Diagnosed coeliac (historical) ☐ Yes ☐ No ☒ Not Recorded

Gluten-free diet

Number of units

Dietitian advised ☐

Guideline units					
Child 1-3 years	10	Male 19-59 years	18	Female 19-74 years	14
Child 4-6 years	11	Male 60-74 years	16	Female 75+ years	12
Child 7-10 years	13	Male 75+ years	14	Breastfeeding	+4
Child 11-14 years	15			3rd trimester pregnancy	+1
Child 15-18 years	18				

**Complex dispensing patient**

Is the patient a complex dispensing patient? ☐ Yes ☐ No ☒ Not Recorded

Monitored dosage system required by pharmacist ☐

Monitored dosage system requested by prescriber / social services / hospital ☐

Other adherence support required (e.g. MAR sheet) ☐

Instalment dispensing requested by prescriber ☐

Special monitoring and feedback required ☐

**Pharmaceutical care plan priority**

PCP Priority:

Notes

Initial assessment complete: ☐

Figure 5-4: Patient Profile data entry/edit page (split over 2 screenshots)

Edit data and click save, the patient home will be displayed (Figure 5-5). Alternatively, click cancel, no changes will be saved and the patient home page will be displayed)

**Note:** There is no mandatory data. Entered data can be saved at any time. The details of the user who last modified the patient profile is recorded along with the date of the modification.

Figure 5-5 shows the patient home after the patient profile has been updated.



Pharmaceutical Care Plan		High Risk Medicine Assessments	New Medicine Interventions												
<b>Patient Profile</b> <span>Show less detail ^</span>															
<b>Named Pharmacist</b>	Pharmacist A														
<b>Additional Information</b>	Pharmacist A (Additional information)														
<b>General Health</b>	Poor Health														
<b>Medical Conditions</b>	Asthma														
<b>Allergies and Sensitivities</b>	Allergic														
<b>Diagnosed Coeliac</b>	Yes														
<b>Complex dispensing patient</b>	Yes														
<b>Dispositions</b>	<table border="0"> <tr> <td>Patient has a</td> <td>Compromised oral route of administration</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Physical Impairment</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Visual Impairment</td> <td>Not Recorded</td> </tr> </table>			Patient has a	Compromised oral route of administration	Not Recorded		Physical Impairment	Not Recorded		Visual Impairment	Not Recorded			
Patient has a	Compromised oral route of administration	Not Recorded													
	Physical Impairment	Not Recorded													
	Visual Impairment	Not Recorded													
<b>Organ function</b>	<table border="0"> <tr> <td>Patient has an impaired/compromised</td> <td>Hepatic Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Renal Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Lung Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Immune Status</td> <td>Not Recorded</td> </tr> </table>			Patient has an impaired/compromised	Hepatic Function	Not Recorded		Renal Function	Not Recorded		Lung Function	Not Recorded		Immune Status	Not Recorded
Patient has an impaired/compromised	Hepatic Function	Not Recorded													
	Renal Function	Not Recorded													
	Lung Function	Not Recorded													
	Immune Status	Not Recorded													
<b>Maternal</b>	<table border="0"> <tr> <td>Patient is</td> <td>Pregnant</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Breast Feeding</td> <td>Not Recorded</td> </tr> </table>			Patient is	Pregnant	Not Recorded		Breast Feeding	Not Recorded						
Patient is	Pregnant	Not Recorded													
	Breast Feeding	Not Recorded													
<b>Pharmaceutical Care Plan Priority</b>	<b>Medium Priority</b>														
Initial assessment completed on	25-Feb-2013 by Ork5														
Patient Profile Last Modified: 25-Feb-2013 by Ork5															
<a href="#">Review/Edit</a>															

Figure 5-5: Patient home after completion of the patient profile

If you have entered any free-text for any of the patient factors this will be displayed on the patient home as "Detail available". You must select the "Review/Edit" link to view this text.

Selecting the "Show less detail" link will display only the named pharmacist, general health, medical conditions, allergies and sensitivities and pharmaceutical care plan priority details (Figure 5-6)

Pharmaceutical Care Plan		High Risk Medicine Assessments	New Medicine Interventions
<b>Patient Profile</b> <span>Show more detail v</span>			
<b>Named Pharmacist</b>	Pharmacist A		
<b>General Health</b>	Poor Health		
<b>Medical Conditions</b>	Asthma		
<b>Allergies and Sensitivities</b>	Allergic		
<b>Diagnosed Coeliac</b>	Yes		
<b>Complex dispensing patient</b>	Yes		
<b>Pharmaceutical Care Plan Priority</b>	<b>Medium Priority</b>		
Initial assessment completed on	25-Feb-2013 by Ork5		
Patient Profile Last Modified: 25-Feb-2013 by Ork5			
<a href="#">Review/Edit</a>			

Figure 5-6: "Show less detail"

To revert back to display of the full details select the "Show more detail" link at the top right hand side of the Patient profile information.

### 5.3 Pharmaceutical care risk assessment

The Pharmaceutical care risk assessment represents a snapshot assessment of the patient's situation in relation to their therapy and subsequent impact on their pharmaceutical care.

**Note:** All questions in the Pharmaceutical care risk assessment must be completed before it can be saved.

#### To create a Pharmaceutical Care Risk Assessment

- Select the “Add” link at the bottom right hand side of the Pharmaceutical care risk assessment section on the “Pharmaceutical care plan” tab. (Figure 5-7)

Pharmaceutical Care Risk Assessment			
Review date	Review user	Care issues?	
05-May-2005	InitialUser	No	<a href="#">View</a>
04-Apr-2004	InitialUser	No	<a href="#">View</a>
03-Mar-2003	InitialUser	No	<a href="#">View</a>
02-Feb-2002	InitialUser	No	<a href="#">View</a>
01-Jan-2001	InitialUser	No	<a href="#">View</a>

Add

Figure 5-7: Add pharmaceutical care risk assessment

- The “Care risk assessment” entry page is displayed (Figure 5-8)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Fri, Mar 23, 2012 16:07

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (11y 1m) Gender Male CHI No. 0102031231*  
*Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

**Care Risk Assessment**  
 Pharmaceutical care issues which affect the patient:

Care issue with the appropriateness of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the formulation of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Side effect/s with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Problem/s with concordance?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue in relation to polypharmacy?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Pharmacokinetic risk factors?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Pharmacodynamic risk factors?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Disease risk factor?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Taking one or more black triangle medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Duplication of medication?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>

**Summary:**  
 Are there any pharmaceutical care issues of note? ☐ Yes ☐ No ☐ Not Recorded

Figure 5-8: Care risk assessment entry page

- Answer Yes, No or Not recorded to each question (If required, free-text notes can be added alongside each question).
- Once all the questions have been answered you must indicate if you believe that there are any care issues of note. As before, you are given a choice of 'Yes', 'No', or 'Not Recorded' options. A multi-line text box is also available for any notes that may supplement your choice.
- When you have completed the entire list of questions click the "Save" button, if any of the Pharmaceutical Care Risk Assessment questions have not been completed they will be

highlighted (Figure 5-9) and you must complete them before you can save the data. When you select the “Save” button, the details are saved and the patient home page is displayed.

#### To exit without saving any changes:

- Select the “Cancel” button, no details are saved and the patient home page is displayed)

**Note:** You cannot edit the care risk assessments at a later date (it is a snapshot at a particular point in time). If there are changes in a patient’s situation then you need to create a separate care risk assessment.

Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser

Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

---

**Care Risk Assessment**  
Pharmaceutical care issues which affect the patient:

Care issue with the appropriateness of the medicine/s?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Care issue with the formulation of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Care issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Side effect/s with one or more medicines?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Recorded	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>

Figure 5-9: “Selection required” message

#### To view an existing medication profile:

Select the “View” link for the pharmaceutical care risk assessment you want to view (Figure 5-10)

The selected pharmaceutical care risk assessment is displayed - Read only (Figure 5-11).

Pharmaceutical Care Risk Assessment			
Review date	Review user	Care issues?	
05-May-2005	InitialUser	No	<a href="#">View</a>
04-Apr-2004	InitialUser	No	<a href="#">View</a>
03-Mar-2003	InitialUser	No	<a href="#">View</a>
02-Feb-2002	InitialUser	No	<a href="#">View</a>
01-Jan-2001	InitialUser	No	<a href="#">View</a>

Figure 5-10: Newly created pharmaceutical care risk assessment displayed

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Mar 26, 2012 08:32

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<b>SMITH, Johnathan (Mr)</b>	Born 03-Feb-2001 (11y 1m) Gender Male CHI No. 0102031231
Preferred name John	Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ	Phone and email 01506 000-000

### Care Risk Assessment

#### Pharmaceutical care issues which affect the patient:

Care issue with the appropriateness of the medicine/s?	<b>No</b>
Care issue with the formulation of the medicine/s?	<b>No</b>
Care issue with the dosage and frequency of the medicine/s?	<b>No</b>
Care issue with the contraindications?	<b>No</b>
Drug interaction with one or more medicines?	<b>No</b>
Side effect/s with one or more medicines?	<b>No</b>
Problem/s with concordance?	<b>No</b>
Care issue in relation to polypharmacy?	<b>No</b>
Pharmacokinetic risk factors?	<b>No</b>
Pharmacodynamic risk factors?	<b>No</b>
Disease risk factor?	<b>No</b>
Taking one or more medicines with a narrow therapeutic range?	<b>No</b>
Taking one or more black triangle medicines?	<b>No</b>
Duplication of medication?	<b>No</b>
<b>Summary</b>	
Are there any pharmaceutical care issues of note?	<b>No</b>

Care Risk Assessment Completed: 05-May-2005

[return to Patient Home Page](#)

Figure 5-11: Care risk assessment - Read only

## 5.4 Pharmaceutical care issues, outcomes and actions

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 current status of the outcome and apply a review by date to each outcome.

The following types of care issue exist:

- Standard
- High risk medicine
- New medicine
- Gluten-free
- Smoking cessation

**Note:** A pharmaceutical care plan uses the type "Standard" only.

**To create a standard care issue for a patient:**

Care Issues				
Care issue	Care issue type	Earliest review by	Last modified on	
> Asthma Inhaler Technique	Standard	01-Feb-2010	03-Dec-2008	<a href="#">View</a>
> Increased Asthma Attacks	Standard		03-Dec-2008	<a href="#">View</a>
> Medication Use Review	Standard		03-Dec-2008	<a href="#">View</a>
> Allergy Review	Standard		03-Dec-2008	<a href="#">View</a>

[4 of 9] [Review](#)

Figure 5-12: Care issues

- Click on the 'Review' link, (Figure 5-12) in the Care Issue Section of the patient home page,
- The care issues review screen is displayed (Figure 5-13)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Mar 26, 2012 08:51

Pharmacy Care Record 

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (11y 1m) Gender Male CHI No. 0102031231*  
*Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ *Phone and email 01506 000-000*

Care Issues				
Care issue	Care issue type	Earliest review by	Last modified on	
> Asthma Inhaler Technique	Standard	01-Feb-2010	03-Dec-2008	<a href="#">View</a>
> Increased Asthma Attacks	Standard		03-Dec-2008	<a href="#">View</a>
> Medication Use Review	Standard		03-Dec-2008	<a href="#">View</a>
> Allergy Review	Standard		03-Dec-2008	<a href="#">View</a>
> Oxygen Technique	Standard		03-Dec-2008	<a href="#">View</a>
> Medication Advice	Standard		03-Dec-2008	<a href="#">View</a>
> Wound Care	Standard		03-Dec-2008	<a href="#">View</a>
> Ointment Technique	Standard		03-Dec-2008	<a href="#">View</a>
> Insulin Injection Advice	Standard		03-Dec-2008	<a href="#">View</a>

[Add](#)

[return to Patient Home Page](#)

Figure 5-13: 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 5-14)

#### 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 5-15); or
- Select "Cancel" – no changes will be saved, the care issues review screen will be displayed (Figure 5-13)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Never

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<b>SMITH, Johnathan (Mr)</b>		Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231
Preferred name John		Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000

### Care Issue

Description of care issue  \*

\* Means a field requires data

Figure 5-14: Add care issue description

To create a care issue outcome associated with a standard care issue:

- Click the "Add" link on the care issue detail page (Figure 5-15)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Never

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<b>SMITH, Johnathan (Mr)</b>		Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231
Preferred name John		Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000

### Care Issue

Description	Poor inhaler technique
Modified	13-Apr-2012 by Testuser

[Edit](#)

### Care Issue Outcome

Desired outcome	Action	Action by	Response	Status	Review by	Modified on	Modified by
No records to display.							

[Add](#)

[return to Care Issues Page](#)  
[return to Patient Home Page](#)

Figure 5-15: Care issue detail page

- The care issue outcome review page is displayed (Figure 5-16)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Never

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231*  
*Preferred name John* *Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

### Care Issue Outcome

\* Means a field requires data

Desired Outcome  \*

Action

Action By

Response

Status  *Note: Setting the status to Complete will clear the Review By date when saved.*

Review By   
*e.g. 01-05-2010 for the 1st of May 2010*

[Save](#) [Cancel](#)

[Click here to save your character Outcome](#)

### Care Issue

Care issue	Care issue type	Earliest review by	Last modified on
▼ Poor inhaler technique	Standard		13-Apr-2012 <a href="#">View</a>
Desired outcome	Action	Action by	Response
No child records to display.			
		Status	Review by
			Modified date

Figure 5-16: 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” option in the “Status” dropdown menu on the care issues review page
- Select the “Save” button, the system will navigate to the care issue detail page (Figure 5-15)

**NOTE:** When the status is set to complete 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 5-17)



<b>Organ function</b>	visual impairment	Not Recorded
Patient has an impaired/compromised	Hepatic Function	Not Recorded
	Renal Function	Not Recorded
	Lung Function	Not Recorded
	Immune Status	Not Recorded
<b>Maternal</b>		
Patient is	Pregnant	Not Recorded
	Breast Feeding	Not Recorded
<b>Pharmaceutical Care Plan Priority</b>	<b>Medium Priority</b>	
Initial assessment completed on	25-Feb-2013 by Ork5	
Patient Profile Last Modified: 25-Feb-2013 by Ork5		

[Review/Edit](#)

### Pharmaceutical Care Risk Assessment

Review date	Review user	Care issues?
No records to display.		

[Add](#)

### Care Issues

Care issue	Care issue type	Earliest review by	Last modified on
> Poor inhaler technique	Standard		26-Feb-2013 <a href="#">View</a>

[1 of 1] [Review](#)

### Medication

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported
No records to display.						

[0 of 0] [Review](#)

Figure 5-17: Care issue summary on patient home

Newly created care issue shown on patient home page

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

Care Issues				
Care issue	Care issue type	Earliest review by	Last modified on	
> Asthma Inhaler Technique	Standard	01-Feb-2010	03-Dec-2008	<a href="#">View</a>
> Poor inhaler technique	Standard	20-Apr-2012	13-Apr-2012	<a href="#">View</a>
> Increased Asthma Attacks	Standard		03-Dec-2008	<a href="#">View</a>
> Medication Use Review	Standard		03-Dec-2008	<a href="#">View</a>

[4 of 10] [Review](#)

Medication

Click to expand care issue detail

Shows total number of care issues. Click review to see all care issues.

## 5.5 Medication

The patient home shows a summary of medication.

**To review medication:**

- Select the “Review” link on the patient home (Figure 5-18)

Medication								
	Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
>	Paracetamol 120mg in 5ml - suspension	30-Nov-2009	CMS	Pain relief	12-Apr-2012	dbo	True	<a href="#">View</a>
>	Salbutamol 100mcg		CMS	Respiration maintenance	12-Apr-2012	dbo	True	<a href="#">View</a>
>	Amoxicillin - 125mg in 5 ml suspension		CMS	Infection control	12-Apr-2012	dbo	True	<a href="#">View</a>
>	Oxygen - 100% respiratory		CMS	Respiration maintenance	12-Apr-2012	dbo	True	<a href="#">View</a>
								[4 of 5] <a href="#">Review</a>

Figure 5-18: Review Medication

- A list of medications are displayed (Figure 5-19)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Oct 22, 2013 15:56

Pharmacy Care Record 

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<b>SMITH, Johnathan (Mr)</b>		Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231	
Preferred name John		Patient Details Last Modified On 03-Dec-2008 By InitialUser	
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000	

Medications								
	Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
>	Paracetamol 120mg in 5ml - suspension	30-Nov-2009	CMS	Pain relief	18-Oct-2013	dbo	True	<a href="#">View</a>
>	Salbutamol 100mcg		CMS	Respiration maintenance	18-Oct-2013	dbo	True	<a href="#">View</a>
>	Amoxicillin - 125mg in 5 ml suspension		CMS	Infection control	18-Oct-2013	dbo	True	<a href="#">View</a>
>	Oxygen - 100% respiratory		CMS	Respiration maintenance	18-Oct-2013	dbo	True	<a href="#">View</a>
>	Aspirin - 100mg		CMS	Pain relief	18-Oct-2013	dbo	True	<a href="#">View</a>

[Add Medication](#)  
[Import Medication](#)

[return to Patient Home Page](#)

Figure 5-19: Medications

**To add a medication:**

- Click the “Add medication” link (Figure 5-19), the entry/edit medication is displayed (Figure 5-20)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Apr 12, 2012 13:41

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231*  
*Preferred name John* *Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
*Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ* *Phone and email 01506 000-000*

---

**Medication** \* Means a field requires data

Name  \*

Service

Indication

Last dispensed on

Imported

Figure 5-20: 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 5-21)\*

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Apr 12, 2012 13:41

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231*  
*Preferred name John* *Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
*Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ* *Phone and email 01506 000-000*

---

**Medication**

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported
aspirin 300mg		CMS		12-Apr-2012	Testuser	False
<div> <div>Quantity</div> <div>No child records to display.</div> </div> <div> <div>Direction</div> <div></div> </div> <div> <div>Dispensed on</div> <div></div> </div> <div> <div>Imported</div> <div></div> </div>						

[Add Medication Dispense](#)

[return to Patient Medications page](#)

[return to Patient Home Page](#)

Figure 5-21: 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.

## 5.6 Core Service Registrations

The patient home displays a summary of core service registration information for the patient for CMS, MAS or both if any exists, Figure 5-22.

Core Service Registrations			
Service	Registration status	Registration status effective from	Last update received
CMS	Registered	03-May-2015	29-Jan-2016
MAS	Lapsed	05-May-2015	29-Jan-2016

Figure 5-22: Core Service Registrations

## 6 High risk medicine care risk assessments

### 6.1 Overview

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

The functionality consists of 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.

## 6.2 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 6-1)

Pharmacy: 1234 - Pharmacy  
User: Testuser - Jane Smith  
Last login: Fri, Jan 29, 2016 15:44

Pharmacy Care Record **NHS**  
SCOTLAND

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

HEPPLE, George (Mr) Born 08-Aug-1931 (84y) Gender Male CHI No. 0808310119  
CMS MAS LAPSED Patient Details Last Modified On 11-Jan-2016 By TestUser  
Address 8 Hepple Place, HH1 1HH Phone and email 01357 246357

Print Care Issues Edit

Pharmaceutical care plan High risk medicine assessments New medicine interventions Support tools

**High risk medicine care risk assessment**

Type	Number of care issues	Last modified on	Last modified by	Assessment completed on	Assessment completed by
No records to display.					

Start high risk medicine care risk assessment

Figure 6-1: high risk medicines tab

Select “Start high risk medicine care risk assessment” link

The system will display the “high risk medicine selection” screen (Figure 6-2)

### 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)

Pharmacy: 1234 - Pharmacy  
User: Testuser - Jane Smith  
Last login: Fri, Jan 29, 2016 15:44

Pharmacy Care Record **NHS**  
SCOTLAND

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

HEPPLE, George (Mr) Born 08-Aug-1931 (84y) Gender Male CHI No. 0808310119  
CMS MAS LAPSED Patient Details Last Modified On 11-Jan-2016 By TestUser  
Address 8 Hepple Place, HH1 1HH Phone and email 01357 246357

High risk medicine care risk assessment

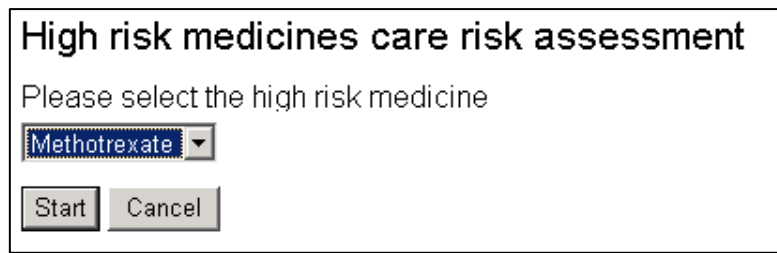
Please select the high risk medicine

Methotrexate

Start Cancel

Figure 6-2: Drug Selection

**Note:** “Methotrexate” used in this User Guide example.



**High risk medicines care risk assessment**

Please select the high risk medicine

Methotrexate ▼

Start Cancel

**Figure 6-3: Select high risk medicine**

Click the “Start” button (Figure 6-3)

The system will navigate to the Methotrexate “Concordance” questions page (Figure 6-4)

**Note:** By selecting the “Start” button (Figure 6-3), creates a new high risk medicine care risk assessment within PCR.

Selecting the “Cancel” button (Figure 6-3) returns the system to the patient home page – a high risk medicine care risk assessment is not created.


## 6.3 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 6-4).

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Fri, Apr 13, 2012 11:06

Pharmacy Care Record


[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**WILLIAMS, Steven (Mr)**
Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111  
Patient Details Last Modified On 13-Apr-2012 By Testuser

Address 5 Oakbank Avenue, Glasgow, G12 3NR
Phone and email

---

HRM Methotrexate Process: **Concordance** > Interactions & precautions > Adverse reactions > Monitoring > Review

### Concordance

Is the patient taking their methotrexate as prescribed? ☐ Yes ☐ No

Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose? ☐ Yes ☐ No

If the patient is taking folic acid are they taking it as prescribed? ☐ Yes ☐ No

Does the patient have a methotrexate patient information and monitoring booklet and do they use it? ☐ Yes ☐ No

When indicated for RA and psoriasis methotrexate is prescribed as a single dose taken **once a week** on the **same day** each week. 'As directed' instructions should be avoided. You should follow up with the patient's GP practice if the instructions printed on the prescription form do not match what the patient tells you.

**Actions:**

**Check the patient's understanding of how and when to take their methotrexate and clarify any discrepancies.**

**If the patient is currently receiving methotrexate 10 mg (either alone or in combination with the 2.5 mg tablets) then discuss the merits of using a single strength of 2.5 mg. If patient is content to change contact their GP to discuss the change**

**Advise the patient that methotrexate should be swallowed whole and not crushed or chewed.**

**Check the patient's understanding of how and when to take their folic acid and clarify any discrepancies.**

**Advise the patient to carry and use the methotrexate booklet.**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

Next - Interactions & precautions
Save & Review

[return to Methotrexate Review Page](#)

Figure 6-4: 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 6-5).



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

### Concordance

Is the patient taking their methotrexate as prescribed?

☐ Yes ☐ No

**Required**

Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose?

☐ Yes ☐ No

**Required**

If the patient is taking folic acid are they taking it as prescribed?

☐ Yes ☐ No

**Required**

Does the patient have a methotrexate patient information and monitoring booklet and do they use it?

☐ Yes ☐ No

**Required**

When  
as a  
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follo  
the t  
  
Acti  
  
C  
ta  
  
If  
(e  
th  
m  
di

Figure 6-5: 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 6-6)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Fri, Apr 13, 2012 11:06

Pharmacy Care Record 

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**WILLIAMS, Steven (Mr)**

Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111

Patient Details Last Modified On 13-Apr-2012 By Testuser

Address 5 Oakbank Avenue, Glasgow, G12 3NR

Phone and email

[HRM Methotrexate Process](#) > [Concordance](#) > [Interactions & precautions](#) > [Adverse reactions](#) > [Monitoring](#) > [Review](#)

### Interactions and precautions

Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?

☒ Yes ☐ No

Is the patient aware that certain OTC medicines can interact with methotrexate?

☐ Yes ☒ No

Serious drug interactions include:

Acitretin and Sulfapyrazone

Chloramphenicol, co-trimoxazole, probenecid and trimethoprim

Consider the need for contraceptive and family planning advice.

**Action:**

**Advise the patient to always check with their GP and pharmacist that any new medicine, including OTC, is safe to take with methotrexate.**

**Record any issues in the patient's care plan and agree desired outcomes and actions.**

[Back - Concordance](#)

[Next - Adverse reactions](#)

[Save & Review](#)

[return to Methotrexate Review Page](#)

Figure 6-6: 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 6-7)

**WILLIAMS, Steven (Mr)**  
 Address 5 Oakbank Avenue, Glasgow, G12 3NR

Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111  
 Patient Details Last Modified On 13-Apr-2012 By Testuser

Phone and email

▼

HRM Methotrexate Process : Concordance > Interactions & precautions > Adverse reactions > Monitoring > Review

**Adverse reactions : side effects and toxicity**

Is the patient aware of the common side effects of methotrexate? YesNo

Is the patient aware of the side effects that occur if they are having a reaction to methotrexate? YesNo

Is the patient aware of what to do if they are suffering from these signs? YesNo

Is the patient aware that adverse reactions should be reported? YesNo

The most common side effects are:

- Skin (e.g. urticaria, acne, photosensitivity)
- Haematopoietic reactions ( e.g. anaemia, pneumonia, septicaemia)
- Alimentary tract (e.g. nausea, vomiting, gingivitis, pharyngitis, intestinal ulceration)
- Hepatic (e.g. acute hepatitis or cirrhosis)
- Urogenital (e.g. vaginal discharge or ulcers, cystitis, dysuria)
- Pulmonary (e.g. acute pulmonary oedema, fibrosis)
- CNS (e.g. headache, drowsiness or blurred vision)
- Cardiac (hypotension, deep vein thrombosis)

**Actions:**

**Check the patient's understanding of the side effects of Methotrexate using the information booklet as a prompt.**

**Ask the patient if they are experiencing any side effects.**

**Refer them to their GP if side effects appear severe.**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

Signs of methotrexate toxicity or intolerance are:

- Breathlessness
- Dry persistent cough
- Severe vomiting or diarrhoea
- Sore throat or mouth ulcers
- Unexplained bleeding or bruising
- Abdominal discomfort
- Dark urine

**Actions:**

**Check the patient's understanding of the signs of methotrexate toxicity using the information booklet.**

**Remind the patient that they should tell the pharmacist, GP or specialist if they experience any side effects that could indicate toxicity.**

**Immediately refer the patient to their GP if they are showing signs of toxicity, contacting their GP to alert them. Patients with signs of pneumonitis must stop methotrexate and seek urgent hospital attention.**

**Advise the patient to report any adverse drug reactions through the MHRA Yellow Card Reporting Scheme either via yourself or by them self reporting.**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

Back - Interactions & precautions

Next - Monitoring

Save & Review

Figure 6-7: 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 6-8); 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**

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Fri, Apr 13, 2012 11:06

Pharmacy Care Record


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**WILLIAMS, Steven (Mr)**
Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111  
Patient Details Last Modified On 13-Apr-2012 By Testuser  
Address 5 Oakbank Avenue, Glasgow, G12 3NR Phone and email

HRM Methotrexate Process : Concordance > Interactions & precautions > Adverse reactions > **Monitoring** > Review

### Monitoring

Is the patient aware of how frequently they should have their blood tests done? ☐ Yes ☐ No

Can the patient tell you the date of their last blood test and, if so, when was it? (Record the date or approximate date if known. Otherwise record "No")

Does the patient record their blood results in their methotrexate monitoring booklet? ☐ Yes ☐ No

Methotrexate has a narrow therapeutic index. Monitoring is very important. Patients should know who is responsible for the prescribing and monitoring of their methotrexate. You should expect to find monitoring will be  
**three monthly** for people stable on methotrexate for years and with no co-morbidities  
**four to eight weekly** for those in the first couple of years of being on a stable dosage or co-morbidities in long-term users.  
**weekly - fortnightly** for those just started.  
**Actions:**  
**Establish if the patient is receiving regular monitoring.**  
**If the patient has not had their blood levels monitored within an appropriate timescale refer them to their GP practice for monitoring, contacting the GP to alert them.**  
**Advise the patient to discuss their monitoring arrangements with their GP or practice nurse if there appears to be confusion about the interval.**  
**Encourage the patient to check their results are normal with their GP or practice nurse after each test and record the results in their monitoring booklet.**  
**Encourage the patient to carry their methotrexate booklet.**  
**Record any care issues in the patient's care plan and agree desired outcome and actions.**

Back - Adverse reactions Save & Review

[return to Methotrexate Review Page](#)

**Figure 6-8: 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 6-7); OR
- Click the “Save & Review” button. The system will navigate to the “Methotrexate Review” screen (Figure 6-9)

## 6.4 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 6-10)

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

**WILLIAMS, Steven (Mr)** Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111  
Patient Details Last Modified On 13-Apr-2012 By Testuser

Address 5 Oakbank Avenue, Glasgow, G12 3NR Phone and email

---

HRM Methotrexate Process : Concordance > Interactions & precautions > Adverse reactions > Monitoring > Review

### Methotrexate high risk medicine care risk assessment summary

Use + to add care issues for the specific question.

**Concordance**

Is the patient taking their methotrexate as prescribed?	Yes	+
Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose?	Yes	+
If the patient is taking folic acid are they taking it as prescribed?	Yes	+
Does the patient have a methotrexate patient information and monitoring booklet and do they use it?		+

Add Care Issues Link

**Adverse reactions : side effects and toxicity**

Is the patient aware of the common side effects of methotrexate?	Yes	+
Is the patient aware of the side effects that occur if they are having a reaction to methotrexate?	Yes	+
Is the patient aware of what to do if they are suffering from these signs?	Yes	+
Is the patient aware that adverse reactions should be reported?	No	+

**Interactions and precautions**

Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?	Yes	+
Is the patient aware that certain OTC medicines can interact with methotrexate?	No	+

**Monitoring**

Is the patient aware of how frequently they should have their blood tests done?	No	+
Can the patient tell you the date of their last blood test and, if so, when was it?	no	+
Does the patient record their blood results in their methotrexate monitoring booklet?	No	+

**Care issues associated with this assessment**

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

**Assessment completion**

Assessment complete	No
Assessment completed by	
Assessment completed on	
<input type="button" value="Complete assessment"/>	

[return to Patient Home Page](#)

Figure 6-9: Methotrexate review screen

Care Issues associated with the assessment are shown below the questions summary. (Figure 6-9)

The assessment completion status is shown at the bottom of the screen (Figure 6-10)

**WILLIAMS, Steven (Mr)** Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111  
Patient Details Last Modified On 13-Apr-2012 By Testuser

Address 5 Oakbank Avenue, Glasgow, G12 3NR Phone and email

HRM Lithium Process : Concordance > Interactions & precautions > Adverse reactions > Monitoring > **Review**

### Lithium high risk medicine care risk assessment summary

Use **+** to add care issues for the specific question.

#### Concordance

Is the patient taking their lithium as prescribed?	Unanswered	<b>+</b>
Does the patient know what to do if they miss a dose?	Unanswered	<b>+</b>
Does the patient have the patient information and recording booklets and alert card and do they use them?	Unanswered	<b>+</b>

#### Interactions and precautions

Is the patient aware they should check that any newly prescribed medicines don't interact with lithium?	Unanswered	<b>+</b>
Does the patient know that certain OTC medicines (e.g. ibuprofen or Alka Seltzer) can interact with lithium?	Unanswered	<b>+</b>

#### Adverse reactions: side effects and toxicity

Is the patient aware of the common side effects of lithium?	Unanswered	<b>+</b>
Is the patient aware of the signs of lithium toxicity?	Unanswered	<b>+</b>
Is the patient aware what might cause lithium toxicity and how to avoid this happening?	Unanswered	<b>+</b>
Is the patient aware of what to do if they are suffering from these signs?	Unanswered	<b>+</b>
Is the patient aware that adverse reactions should be reported?	Unanswered	<b>+</b>

#### Monitoring

Has the patient had a blood test to check their lithium levels in the last three months?	Unanswered	<b>+</b>
--	------------	----------

#### Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

**Add**

#### Assessment completion

Assessment complete	<b>No</b>
Assessment completed by	
Assessment completed on	
<a href="#">Complete assessment</a>	

[return to Patient Home Page](#)

Figure 6-10: denotes unanswered questions

### 6.4.1 Additional information on Warfarin Summary Page

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

Warfarin high risk medicine care risk assessment summary						
<b>Concordance</b>		<b>Adverse reactions: side effects and toxicity</b>				
Is the patient taking their Warfarin as prescribed?	<b>Yes</b>	<b>+</b>				
Does the patient know what to do if they miss a dose?	<b>Yes</b>	<b>+</b>				
Does the patient have the patient information and recording booklets and alert card and do they use them?	<b>Yes</b>	<b>+</b>				
<b>Interactions and precautions</b>						
Is the patient aware they should inform the team responsible for their Warfarin care of any newly prescribed medicines to ensure any interactions are managed appropriately?	<b>Yes</b>	<b>+</b>				
Does the patient know that certain OTC medicines (e.g. ibuprofen or miconazole gel) and foods / alcohol can interact with Warfarin?	<b>Yes</b>	<b>+</b>				
		<b>Monitoring</b>				
		Has the patient had a recent blood test to check their INR?				
		<b>Yes</b>				
		<b>+</b>				
Use <b>+</b> to add care issues for the specific question.						
<table border="1"> <thead> <tr> <th>Key messages:</th> <th>Actions:</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>Always check for interacting medicines and manage accordingly i.e. more frequent INR monitoring and adjustment of dose of Warfarin if appropriate</li> <li>Check if the patient has been educated on Warfarin</li> <li>Check if the patient has Oral Anticoagulant Therapy Pack</li> <li>Check if the patient has a recent INR result</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>Any pharmaceutical care issues, desired outcomes and actions to resolve the issues should be agreed with patient and recorded in their care plan.</li> <li>At each future dispensing:               <ul style="list-style-type: none"> <li>Check for monitoring and signs of toxicity</li> <li>Review and update any outstanding care issues in the care plan if appropriate</li> </ul> </li> </ul> </td> </tr> </tbody> </table>			Key messages:	Actions:	<ul style="list-style-type: none"> <li>Always check for interacting medicines and manage accordingly i.e. more frequent INR monitoring and adjustment of dose of Warfarin if appropriate</li> <li>Check if the patient has been educated on Warfarin</li> <li>Check if the patient has Oral Anticoagulant Therapy Pack</li> <li>Check if the patient has a recent INR result</li> </ul>	<ul style="list-style-type: none"> <li>Any pharmaceutical care issues, desired outcomes and actions to resolve the issues should be agreed with patient and recorded in their care plan.</li> <li>At each future dispensing:               <ul style="list-style-type: none"> <li>Check for monitoring and signs of toxicity</li> <li>Review and update any outstanding care issues in the care plan if appropriate</li> </ul> </li> </ul>
Key messages:	Actions:					
<ul style="list-style-type: none"> <li>Always check for interacting medicines and manage accordingly i.e. more frequent INR monitoring and adjustment of dose of Warfarin if appropriate</li> <li>Check if the patient has been educated on Warfarin</li> <li>Check if the patient has Oral Anticoagulant Therapy Pack</li> <li>Check if the patient has a recent INR result</li> </ul>	<ul style="list-style-type: none"> <li>Any pharmaceutical care issues, desired outcomes and actions to resolve the issues should be agreed with patient and recorded in their care plan.</li> <li>At each future dispensing:               <ul style="list-style-type: none"> <li>Check for monitoring and signs of toxicity</li> <li>Review and update any outstanding care issues in the care plan if appropriate</li> </ul> </li> </ul>					
<b>Care issues associated with this assessment</b>						
Care issue	Earliest review by	Last modified on				
No records to display.						
<a href="#">Add</a>						
<b>Assessment completion</b>						
Assessment complete	<b>Yes</b>					

Figure 6-11: Warfarin summary page with key messages and actions text




## 6.5 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 6-12)

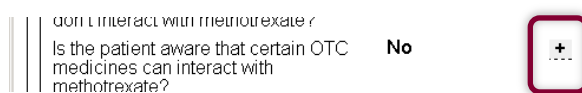


Figure 6-12: Add Care Issue / Care Issue Outcome link

- The system will display the high risk medicines “Record care issue” screen (Figure 6-13)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Jan 5, 2012 11:33

Pharmacy Care Record **NHS**  
SCOTLAND

Search Protocols Reports Change password Manage profile Help Logout

**WILLIAMS, Steven (Mr)** Born 15-Feb-1945 (66y) Gender Male CHI No. 1111111111  
Patient Details Last Modified On 05-Jan-2012 By Testuser  
Address 5 Oakbank Avenue, Glasgow, G12 3NR Phone and email

**Record care issue for high risk medicine care risk assessment** \* Means a field requires data

**Care issue**  
Description of care issue Patient unaware that some OTC products can interact with Methotrex \*

**Care issue outcome**  
Desired Outcome Patient now aware to check suitability of OTC products purchased with \*

Action

Action By Patient

Response

Status Open

Review By

e.g. 01-05-2010 for the 1st of May 2010

Save Cancel

Figure 6-13: 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.

Interactions and precautions		Monitoring	
Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?	Yes	Is the patient aware of how frequently they should have their blood tests done?	Yes
Is the patient aware that certain OTC medicines can interact with methotrexate?	Yes	Can the patient tell you the date of their last blood test and, if so, when was it?	1
		Does the patient record their blood results in their methotrexate monitoring booklet?	Yes

**Care issues associated with this assessment**

Care issue	Earliest review by	Last modified on	
> Patient unaware that some OTC products can interact with Methotrexate	25-Jan-2012	09-Jan-2012	<a href="#">View</a>

[Add](#)

**Assessment completion**

Assessment complete	No
Assessment completed by	
Assessment completed on	
<a href="#">Complete assessment</a>	

[return to Patient Home Page](#)

Figure 6-14: Care Issues Associated with This Assessment




## 6.7 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 6-14)
- The care issue form is displayed (Figure 6-15)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Fri, Apr 13, 2012 14:39

Pharmacy Care Record


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**SMITH, Johnathan (Mr)** Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231  
Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

Record care issue for high risk medicine care risk assessment \* Means a field requires data

Care issue

Description of care issue \*

Care issue outcome

Desired Outcome \*

Action

Action By

Patient

Response

Status

Open

Review By

e.g. 01-05-2010 for the 1st of May 2010

Save

Cancel

Figure 6-15: 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 6-16)

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on	
> Poor inhaler technique		13-Apr-2012	<a href="#">View</a>

[Add](#)

Figure 6-16: Associated care issues

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

## 6.8 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 6-17)
- The system will set the status of the assessment to completed and refresh the page (Figure 6-18)
- The assessment completion details will be updated:
  - Assessment Complete = Yes
  - Assessment completed by – Pharmacist ID
  - Assessment completed on - date

Is the patient taking their methotrexate as prescribed?	Yes	+	Is the patient aware of the common side effects of methotrexate?	Yes	+
Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose?	Yes	+	Is the patient aware of the side effects that occur if they are having a reaction to methotrexate?	Yes	+
If the patient is taking folic acid are they taking it as prescribed?	Yes	+	Is the patient aware of what to do if they are suffering from these signs?	Yes	+
Does the patient have a methotrexate patient information and monitoring booklet and do they use it?	Yes	+	Is the patient aware that adverse reactions should be reported?	Yes	+

<b>Interactions and precautions</b>		<b>Monitoring</b>			
Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?	Yes	+	Is the patient aware of how frequently they should have their blood tests done?	Yes	+
Is the patient aware that certain OTC medicines can interact with methotrexate?	No	+	Can the patient tell you the date of their last blood test and, if so, when was it?	No	+
			Does the patient record their blood results in their methotrexate monitoring booklet?	Yes	+

**Care issues associated with this assessment**

Care issue	Earliest review by	Last modified on	
> Patient unaware that some OTC products can interact with Methotrexate	11-Jan-2012	06-Jan-2012	<a href="#">View</a>

[Add](#)

**Assessment completion**

Assessment complete	No
Assessment completed by	
Assessment completed on	
<a href="#">Complete assessment</a>	

[return to Patient Home Page](#)

Figure 6-17: Assessment completion details for an “Open” assessment

**Assessment completion**

Assessment complete	Yes
Assessment completed by	Testuser
Assessment completed on	06-Jan-2012

[return to Patient Home Page](#)

Figure 6-18: Assessment completion details updated

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

## 6.9 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 6-19)
- 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 6-19)
- The system will navigate to the HRM Care Risk Assessment Review page

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Wed, Oct 23, 2013 11:55

Pharmacy Care Record 

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**SMITH, Johnathan (Mr)** *Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231*  
*Preferred name John* *Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
*Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ* *Phone and email 01506 000-000* 

[Print Care Issues](#) [Edit](#)

[Pharmaceutical care plan](#) [High risk medicine assessments](#) [New medicine interventions](#) [Support tools](#)

#### High risk medicine care risk assessment

Type	Number of care issues	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Methotrexate	0	23-Oct-2013	Testuser		<a href="#">Edit</a>

[Start high risk medicine care risk assessment](#)

Figure 6-19: High Risk Medicines tab

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Jan 12, 2012 14:12

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**WILLIAMS, Steven (Mr)**

Born **15-Feb-1945 (66y)** Gender **Male** CHI No. **1111111111**

Patient Details Last Modified On **05-Jan-2012** By **Testuser**

Address **5 Oakbank Avenue, Glasgow, G12 3NR**

Phone and email **01415554444**

HRM Methotrexate Process : **Concordance** > [Interactions & precautions](#) > [Adverse reactions](#) > [Monitoring](#) > [Review](#)

### Concordance

Is the patient taking their methotrexate as prescribed?

☒ Yes ☒ No

Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose?

☒ Yes ☒ No

If the patient is taking folic acid are they taking it as prescribed?

☒ Yes ☒ No

Does the patient have a methotrexate patient information and monitoring booklet and do they use it?

☒ Yes ☒ No

Read Only

When indicated for RA and psoriasis methotrexate is prescribed as a single dose taken **once a week** on the **same day** each week. 'As directed' instructions should be avoided. You should follow up with the patient's GP practice if the instructions printed on the prescription form do not match what the patient tells you.

#### Actions:

**Check the patient's understanding of how and when to take their methotrexate and clarify any discrepancies.**

**If the patient is currently receiving methotrexate 10 mg (either alone or in combination with the 2.5 mg tablets) then discuss the merits of using a single strength of 2.5 mg. If patient is content to change contact their GP to discuss the change**

**Advise the patient that methotrexate should be swallowed whole and not crushed or chewed.**

**Check the patient's understanding of how and when to take their folic acid and clarify any discrepancies.**

**Advise the patient to carry and use the methotrexate booklet.**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

[Next - Interactions & precautions](#)

[return to Methotrexate Review Page](#)

Figure 6-20: Read only – completed assessment

**Note:** All data for a completed HRM Care Risk Assessment is shown as read only (Figure 6-20). 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.

## 7 New medicine interventions

### 7.1 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

### 7.2 Start a new medicine intervention

#### To start a new medicine intervention:

- Select the "New Medicines Interventions" tab on the patient home page (Figure 7-1)
- Select the "Start new medicine intervention" link, the "enter medication details" page will be displayed (Figure 7-2)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Wed, Oct 23, 2013 11:55

Pharmacy Care Record


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[Hospital](#)
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---

**SMITH, Johnathan (Mr)**  
Preferred name John

Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231  
Patient Details Last Modified On 03-Dec-2008 By InitialUser

---

Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ
Phone and email 01506 000-000

[Print Care Issues](#)
[Edit](#)

---

Pharmaceutical care plan
High risk medicine assessments
New medicine interventions
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---

**New medicine interventions**

Medicine detail	Number of care issues	Status	Last modified on	Last modified by	Intervention completed on	Intervention completed by
Aspirin 75mg Tablets	0	Open	22-Oct-2013	Testuser		<a href="#">Edit</a>

[Start new medicine intervention](#)


Figure 7-1: New medicines interventions tab on patient home page

## 7.3 Enter medication details

### To enter and save medication details:

- Enter the required information in the medication details page (Figure 7-2)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 12:03

Pharmacy Care Record 

**Search Protocols Reports Change password Manage profile Yellow card Help Logout**

**SMITH, Johnathan (Mr)** Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231  
 Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

**Start new medicine intervention**

**Medicine** \* Means a field requires data

Medicine detail  \*

Instructions

Service

Indication

Figure 7-2: 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: CMS 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.

## 7.4 Enter answers to initial intervention questions

The Initial intervention entry page is shown in (Figure 7-3)

### To enter answers to initial intervention questions:

- Confirm or select intervention date in the “Intervention” record section of the page (Figure 7-3).

**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 7-4)

<b>SMITH, Johnathan (Mr)</b> Preferred name John		Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231 Patient Details Last Modified On 03-Dec-2008 By InitialUser	
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000	

**Initial intervention** \* Means a field requires data

**Medicine**

Medicine detail	Aspirin 75mg Tablets
Instructions	Take ONE Tablet Daily
Service	CMS
Indication	Angina

**Intervention record**

Intervention date  \*  
e.g. 01-05-2010 for the 1st of May 2010

Does the patient know why they have been prescribed the medicine? 
☐ Yes ☐ No ☒ Not recorded

Notes

Is there anything that the patient would like to know about the medicine and how it should work? 
☐ Yes ☐ No ☒ Not recorded

Notes

Is there anything else that the patient would like to know about the medicine? 
☐ Yes ☐ No ☒ Not recorded

Notes

Figure 7-3: Initial intervention entry page



## 7.5 New medicines interventions review page

This section describes the options available from the new medicines interventions review page (Figure 7-4).

<b>SMITH, Johnathan (Mr)</b>		Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231	
Preferred name John		Patient Details Last Modified On 03-Dec-2008 By InitialUser	
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000	

### New medicines intervention for Aspirin 75mg Tablets

Use [+](#) to add care issues for the specific question.

#### Medicine

Medicine detail	Aspirin 75mg Tablets
Instructions	Take ONE Tablet Daily
Service	CMS
Indication	Angina

Last modified: 13-Apr-2012 by Testuser

#### Initial intervention

Does the patient know why they have been prescribed the medicine?	Yes	<a href="#">+</a>
Is there anything that the patient would like to know about the medicine and how it should work?	Yes	<a href="#">+</a>
Is there anything else that the patient would like to know about the medicine?	Not recorded	<a href="#">+</a>

Last modified: 13-Apr-2012 by Testuser

[Schedule follow up](#)

#### Care issues associated with this intervention

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

#### Intervention completion

Intervention complete	No
Intervention completed by	
Intervention completed on	

[Complete intervention](#)
[Select...](#)

[return to Patient Home Page](#)

Figure 7-4: 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.

## 7.6 Schedule a follow up intervention

Having started an initial intervention (see section 7.2) 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 7-5), the system will display a “Schedule follow up” pop up form (Figure 7-6)

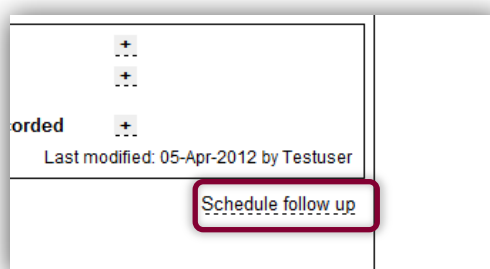


Figure 7-5: “Schedule follow up” link

- Use the date picker in the pop up form (Figure 7-6) 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

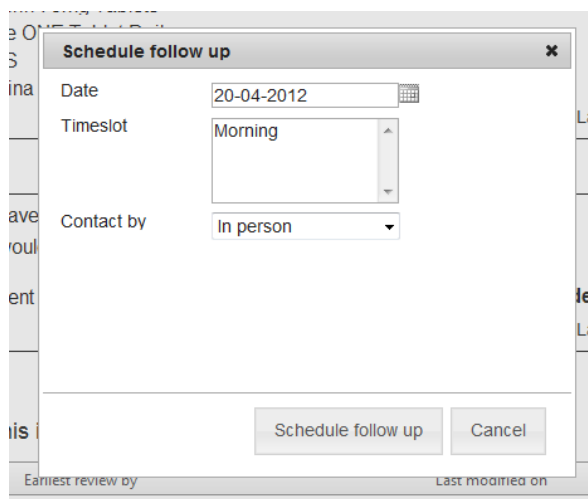


Figure 7-6: Schedule follow up pop up dialogue

- 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 7-7)

<b>SMITH, Johnathan (Mr)</b> Preferred name John		Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231 Patient Details Last Modified On 03-Dec-2008 By InitialUser	
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ		Phone and email 01506 000-000	

### New medicines intervention for *Aspirin 75mg Tablets*

Use to add care issues for the specific question.

**Medicine**

Medicine detail	Aspirin 75mg Tablets
Instructions	Take ONE Tablet Daily
Service	CMS
Indication	Angina

Last modified: 13-Apr-2012 by Testuser

**Initial intervention**

Does the patient know why they have been prescribed the medicine?	<b>Yes</b>	
Is there anything that the patient would like to know about the medicine and how it should work?	<b>Yes</b>	
Is there anything else that the patient would like to know about the medicine?	<b>Not recorded</b>	

Last modified: 13-Apr-2012 by Testuser

**Follow up**

Scheduled date	Friday, April 20, 2012	
Intervention date	Not set	
Contact preference	In person	
Time slot preference	Morning	
Has the patient started to take the medicine?	<b>Unanswered</b>	
Is the patient still taking the medicines according to the instructions?	<b>Unanswered</b>	
Has the patient missed any doses of the medicine or changed how they take it?	<b>Unanswered</b>	
Is the patient having any problems with the medicine?	<b>Unanswered</b>	
Is there anything else that the patient would like to know about the medicine?	<b>Unanswered</b>	
Does the patient require another follow up intervention?	<b>Unanswered</b>	
Is this follow up intervention complete?	<b>Unanswered</b>	

Last modified: 13-Apr-2012 by Testuser

[Schedule follow up](#)

Figure 7-7: 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 7-5), the system will display a “Schedule follow up” pop up form (Figure 7-6)
- 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 7-8)

Figure 7-8: 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 7-7 with the exception that the contact preference is set to ‘By Telephone’ and the contact number is displayed.

## 7.7 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 7-9.

Follow up

Scheduled date	Friday, April 20, 2012	
Intervention date	Not set	
Contact preference	In person	
Time slot preference	Morning	
Has the patient started to take the medicine?	Unanswered	+
Is the patient still taking the medicines according to the instructions?	Unanswered	+
Has the patient missed any doses of the medicine or changed how they take it?	Unanswered	+
Is the patient having any problems with the medicine?	Unanswered	+
Is there anything else that the patient would like to know about the medicine?	Unanswered	+
Does the patient require another follow up intervention?	Unanswered	+
Is this follow up intervention complete?	Unanswered	+

Last modified: 20-Aug-2012 by testuser

[Schedule follow up](#)

**Care issues associated with this intervention**

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

**Intervention completion**

Intervention complete	No
-----------------------	----

Figure 7-9: Select link to edit follow up intervention

- The follow-up intervention edit page will be shown, Figure 7-10.

Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

### Follow up intervention

\* Means a field requires data

**Medicine**

Medicine detail	Aspirin 75mg Tablets
Instructions	Take ONE tablet daily
Service	CMS
Indication	Angina

**Contact preference**

Contact preference	<input type="text" value="In person"/>
Telephone	<input type="text"/>

**Intervention record**

Scheduled date	<input type="text" value="30-10-2013"/> *	Timeslot	<input type="text" value="1pm"/>
<small>e.g: 31-07-2013 for the 31st of July 2013</small>			
Intervention date	<input type="text" value="22-10-2013"/>		
<small>e.g: 31-07-2013 for the 31st of July 2013</small>			
Has the patient started to take the medicine? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Is the patient still taking the medicine according to the instructions? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Has the patient missed any doses of the medicine or changed how they take it? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Is the patient having any problems with the medicine? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Is there anything else the patient would like to know about the medicine? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Does the patient require another follow up intervention? <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Not recorded			
Notes <input type="text"/>			
Is this follow up intervention complete? <input type="radio"/> Yes <input checked="" type="radio"/> No			

Figure 7-10: 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 7-11.

**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 7-11
- Select the “Cancel” button to exit without saving any changes and return to the new medicine intervention review page.

Is there anything else that the patient would like to know about the medicine?		<b>Not recorded</b>
Last modified: 20-Aug-2012 by testuser		
<b>Follow up</b>		
Scheduled date	Friday, April 20, 2012	
Intervention date	Monday, April 23, 2012	
Contact preference	In person	
Time slot preference	Morning	
Has the patient started to take the medicine?	<b>Yes</b>	
Is the patient still taking the medicines according to the instructions?	<b>Yes</b>	
Has the patient missed any doses of the medicine or changed how they take it?	<b>Yes</b>	
Is the patient having any problems with the medicine?	<b>Yes</b>	
Is there anything else that the patient would like to know about the medicine?	<b>No</b>	
Does the patient require another follow up intervention?	<b>No</b>	
Is this follow up intervention complete?	<b>Yes</b>	
Last modified: 20-Aug-2012 by testuser		
<a href="#">Schedule follow up</a>		
<b>Care issues associated with this intervention</b>		
Care issue	Earliest review by	Last modified on
No records to display.		
<a href="#">Add</a>		

**Intervention completion**

Figure 7-11: New medicine intervention review page with completed follow up intervention



## 7.8 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 7-12)

Is this follow up intervention complete?		<b>Unanswered</b>
		Last modified: 05-Apr-2012 by Testuser
		<a href="#">Schedule follow up</a>
<b>Care issues associated with this intervention</b>		
Care issue	Earliest review by	Last modified on
No records to display.		
		<a href="#">Add</a>

Figure 7-12: Care issues associated with a new medicine intervention

- The “Record care issues for new medicine intervention” page will be displayed (Figure 7-13)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 12:03

Pharmacy Care Record



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**SMITH, Johnathan (Mr)** Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231  
 Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

### Record care issue for new medicine intervention

\* Means a field requires data

#### Care issue

Description of care issue

#### Care issue outcome

Desired Outcome

Action

Action By

Patient

Response

Status

Open

Review By

e.g: 01-05-2010 for the 1st of May 2010

**Figure 7-13: 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 7-14)

Is this follow up intervention complete?

Last modified: 05-Apr-2012 by Testuser

Schedule follow up

Care issues associated with this intervention

Care issue	Earliest review by	Last modified on	
> difficulty opening the packaging	18-Apr-2012	05-Apr-2012	<a href="#">View</a>


Add

Intervention completion

Intervention complete	No
Intervention completed by	

**Figure 7-14: 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 7-15)




Initial intervention	
Does the patient know why they have been prescribed the medicine?	Yes 
Is there anything that the patient would like to know about the medicine and how it should work?	Yes 
Is there anything else that the patient would like to know about the medicine?	Not recorded 
Last modified: 13-Apr-2012 by Testuser	
Follow up	

Figure 7-15: 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 7-16)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 12:03

Pharmacy Care Record 

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**SMITH, Johnathan (Mr)** *Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231*  
*Preferred name John* *Patient Details Last Modified On 03-Dec-2008 By InitialUser*  
*Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ* *Phone and email 01506 000-000*

**Record care issue for new medicine intervention** \* Means a field requires data

<b>Care issue</b>	
Description of care issue	Patient is having problems or suffering adverse effects *
<b>Care issue outcome</b>	
Desired Outcome	Patient is not having problems or suffering adverse effects *
Action	
Action By	Patient
Response	
Status	Open
Review By	
e.g. 01-05-2010 for the 1st of May 2010	
<div>Save Cancel</div>	

Figure 7-16: 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 7-14)

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

## 7.9 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 7-17).

Follow up

Scheduled date

Monday, March 26, 2012

Intervention date

Not set

Contact preference

By telephone on 01506 000-000

Time slot preference

Call after 1pm

Has the patient started to take the medicine?

Unanswered

+

Is the patient still taking the medicines according to the instructions?

Unanswered

+

Has the patient missed any doses of the medicine or changed how they take it?

Unanswered

+

Is the patient having any problems with the medicine?

Unanswered

+

Is there anything else that the patient would like to know about the medicine?

Unanswered

+

Does the patient require another follow up intervention?

Unanswered

+

Is this follow up intervention complete?

Unanswered

+

Last modified: 26-Mar-2012 by Testuser

Schedule follow up

Care issues associated with this intervention

Care issue	Earliest review by	Last modified on
No records to display.		

Add

Intervention completion

Intervention complete

No

Intervention completed by

Intervention completed on

Complete intervention

Select...

Select...

Adhering

Not Adhering

Lost to intervention

[return to Patient Home Page](#)

Figure 7-17: Intervention completion

- Select the “Complete intervention” button, the page will refresh and the intervention completion information will be updated (Figure 7-18)

Intervention completion	
Intervention complete	<b>Yes: Adhering</b>
Intervention completed by	<b>Testuser</b>
Intervention completed on	<b>05-Apr-2012</b>


[return to Patient Home Page](#)

Figure 7-18: Intervention completion information displayed

## 7.10 Summary of new medicine interventions for an individual patient

The new medicine interventions tab on the patient home page shows a summary of all new medicine interventions for a patient (Figure 7-19).

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 12:03

Pharmacy Care Record 

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---

**SMITH, Johnathan (Mr)** Born 03-Feb-1973 (39y) Gender Male CHI No. 0102031231  
 Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000 Print Care Issues Edit

Pharmaceutical Care Plan   High Risk Medicine Assessments   **New Medicine Interventions**

Medicine detail	Number of care issues	Status	Last modified on	Last modified by	Intervention completed on	Intervention completed by
Aspirin 75mg Tablets	0	Open	13-Apr-2012	Testuser		<a href="#">Edit</a>

[Start new medicine intervention](#)

Figure 7-19: 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”)

## 8 Gluten-free support tool assessment

### 8.1 Overview

This support tool assessment allows pharmacists to manage information about patients that are following a Gluten-free diet.

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

The questions are grouped into the following sections:

- Concordance
- Interactions and precautions
- Adverse effects
- Monitoring

A patient can have multiple Gluten-free support tool assessments over time.

Sections can be answered in sequence, 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 Gluten-free support tool assessments; these can be viewed alongside standard care issues as well as with the associated Gluten-free support tool assessments.

A Gluten-free support tool 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.

A Gluten-free support tool 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 Gluten-free support tool assessment.

## 8.2 Start a Gluten-free Support Tool Assessment

### To start a Gluten-free Support Tool Assessment:

- Select the "Support tools" tab on the patient home page (Figure 8-1)
- Select the "Start support tool assessment" link, the "Support tool selection" page will be displayed (Figure 8-2)

Pharmacy: 12345 - Pharmacy Two  
User: Testuser - Jane Smith  
Last login: Thu, Jun 5, 2014 13:49

Pharmacy Care Record **NHS**  
SCOTLAND

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**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 05-Jun-2014 By Testuser

Address 3 Apples Avenue, PA3 3BB Phone and email 10234567890

Print Care Issues Edit

Pharmaceutical care plan High risk medicine assessments New medicine interventions **Support tools**

**Support tool assessments**

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
No records to display.						

**Smoking cessation assessments**

Quit date	Status	MDS	Last recorded contact	Quit attempt in
No records to display.				

Start support tool assessment

Figure 8-1: Support tools tab

- Select "Gluten-free" from the dropdown menu
- The "Concordance" page is displayed

Pharmacy: 12345 - Pharmacy Two  
User: Testuser - Jane Smith  
Last login: Thu, Jun 5, 2014 14:17

Pharmacy Care Record **NHS**  
SCOTLAND

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**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 05-Jun-2014 By Testuser

Address 3 Apples Avenue, PA3 3BB Phone and email 10234567890

**Support tool assessment**

Please select the support tool

Gluten-free

Start Cancel

Figure 8-2: Support tool selection

By selecting the "Start" button (Figure 8-2), this will create a new Gluten-free support tool assessment within PCR. Selecting the "Cancel" button will return the system to the patient home page – a Gluten-free support tool assessment will not be created.



### 8.3 Create a Gluten-free support tool assessment

Having completed the steps in section 8.2, this section guides you through the procedure to create and save a Gluten-free support tool assessment.


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.

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 8-3.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record


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WILLIAMS, Alan (Mr)
Born 17-Oct-1971 (41y) Gender Male CHI No. 5555555555  
Patient Details Last Modified On 10-Oct-2013 By Testuser

Address
Phone and email

[Gluten-free assessment](#) [Concordance](#) > [Interactions & precautions](#) > [Adverse effects](#) > [Monitoring](#) > [Review](#)

### Concordance

Is the patient adhering to their gluten-free diet?

☐ Yes
☐ No

Does the patient understand how to identify foods that may contain gluten?

☐ Yes
☐ No

Does the patient have information that will support their concordance with a gluten-free diet?

☐ Yes
☐ No

Coeliac Disease is an autoimmune condition. Ingesting gluten causes the villi of the small intestine to react by flattening. This reduces the absorptive capacity of the intestine.

**Actions:**

**Check the patient's feelings about how they are managing with their diet.**

**Check if the patient is confident that they can identify foods that contain gluten.**

**Enquire if the patient is aware of the symptoms caused by eating gluten. There is wide variation in the severity of symptoms; some patients do not experience any symptoms.**

**Signpost the patient to Coeliac UK (www.coeliac.org.uk).**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

**Refer to the community dietitian, patient's GP, or as per healthboard guidelines.**

Next - Interactions & precautions

Save & Review

[return to Gluten-free Review Page](#)

Figure 8-3: 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 8-4.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record 

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<b>WILLIAMS, Alan (Mr)</b>		Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555	
		Patient Details Last Modified On 10-Oct-2013 By Testuser	
Address		Phone and email	
<a href="#">Gluten-free assessment</a> > <a href="#">Concordance</a> > <b><a href="#">Interactions &amp; precautions</a></b> > <a href="#">Adverse effects</a> > <a href="#">Monitoring</a> > <a href="#">Review</a>			
<b>Interactions &amp; precautions</b>			
Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?		<input type="radio"/> Yes <input type="radio"/> No	
Is the patient aware of how to take these medicines properly, if indicated?		<input type="radio"/> Yes <input type="radio"/> No	
		<b>Health risks associated with non-compliance with a gluten-free diet include osteoporosis, chronic malabsorption, and gut lymphoma.</b> <b>Actions:</b> <b>Provide advice on how to take the medicines properly.</b> <b>Record any care issues in the patient's care plan and agree desired outcomes and actions.</b>	
<a href="#">Back - Concordance</a>		<a href="#">Next - Adverse effects</a>	
<a href="#">Save &amp; Review</a>			

[return to Gluten-free Review Page](#)

**Figure 8-4: 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 8-5.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Oct 10, 2013 13:04

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**WILLIAMS, Alan (Mr)**

Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555

Patient Details Last Modified On 10-Oct-2013 By Testuser

Address

Phone and email

[Gluten-free assessment](#) > [Concordance](#) > [Interactions & precautions](#) > **Adverse effects** > [Monitoring](#) > [Review](#)

**Adverse effects**

Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?

☐ Yes ☐ No

Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?

☐ Yes ☐ No

Is the patient aware that adverse effects should be reported?

☐ Yes ☐ No

Patients who do not adhere strictly to their diet may experience a decreased appetite, weight loss, diarrhoea, anaemia, mouth ulcers, abdominal bloating, lethargy, nausea and blood in stools.

**Actions:**

**Keep a record of any problems that the patient describes.**

**Refer them to their GP if symptoms appear severe.**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

[Back - Interactions & precautions](#)

[Next - Monitoring](#)

[Save & Review](#)

[return to Gluten-free Review Page](#)

**Figure 8-5: 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 8-6.

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

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

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Oct 10, 2013 13:04

Pharmacy Care Record **NHS**  
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**WILLIAMS, Alan (Mr)**

Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555

Patient Details Last Modified On 10-Oct-2013 By Testuser

Address Phone and email

[Gluten-free assessment](#) > [Concordance](#) > [Interactions & precautions](#) > [Adverse effects](#) > **Monitoring** > [Review](#)

**Monitoring**

Is the patient aware of how many gluten-free units they are able to order each month?

☒ Yes ☐ No

Gluten-free annual health check not completed in pharmacy ☐

What date is the patient due to receive their gluten-free annual health check at the pharmacy?

Height or weight or both not available ☐

Height (m)

Weight (kg)

BMI

There are national recommendations for the number of monthly gluten-free units; these vary by age and gender. The amount of gluten-free units patients are given should meet their dietary needs.

Patients should be monitored periodically to ensure that they maintain a healthy weight. Some patients may have a blood test at intervals by their general practitioner to ensure that the patient is not showing signs of malabsorption

**Actions:**

**Communicate the information gained from the annual health check to the patient's general practitioner.**

**Record any care issues in the patient's care plan and agree desired outcome and actions.**

[Back - Adverse effects](#)

[Save & Review](#)

[return to Gluten-free Review Page](#)

**Figure 8-6: Monitoring**

Gluten-free annual health check date is mandatory unless “Gluten-free annual health check not completed in Pharmacy” checkbox is selected.

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 8-7

## 8.4 Gluten-free support tool assessment summary page

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Oct 10, 2013 13:04

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**WILLIAMS, Alan (Mr)** Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555  
Patient Details Last Modified On 10-Oct-2013 By Testuser

Address Phone and email

Gluten-free assessment : [Concordance](#) > [Interactions & precautions](#) > [Adverse effects](#) > [Monitoring](#) > **Review**

### Gluten-free assessment summary

**Concordance**

Is the patient adhering to their gluten-free diet?	Yes	..+
Does the patient understand how to identify foods that may contain gluten?	Yes	..+
Does the patient have information that will support their concordance with a gluten-free diet?	No	..+

**Adverse effects**

Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?	Yes	..+
Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?	Yes	..+
Is the patient aware that adverse effects should be reported?	Yes	..+

**Interactions and precautions**

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	Yes	..+
Is the patient aware of how to take these medicines properly, if indicated?	Yes	..+

**Monitoring**

Is the patient aware of how many gluten-free units they are able to order each month?	Yes	..+
Gluten-free annual health check not completed in pharmacy	No	
What date is the patient due to receive their gluten-free annual health check at the pharmacy?	10-Oct-2014	..+
Height or weight or both not available	No	
Height (m)	1.84	
Weight (kg)	85	
BMI	25.11	..+

Use ..+ to add care issues for the specific question.

**Care issues associated with this assessment**

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

**Assessment completion**

Assessment complete	No
Assessment completed by	
Assessment completed on	
<a href="#">Complete assessment</a>	

[return to Patient Home Page](#)

Figure 8-7: Gluten-free support tool assessment summary page

Care issues associated with the assessment are shown below the questions summary.


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

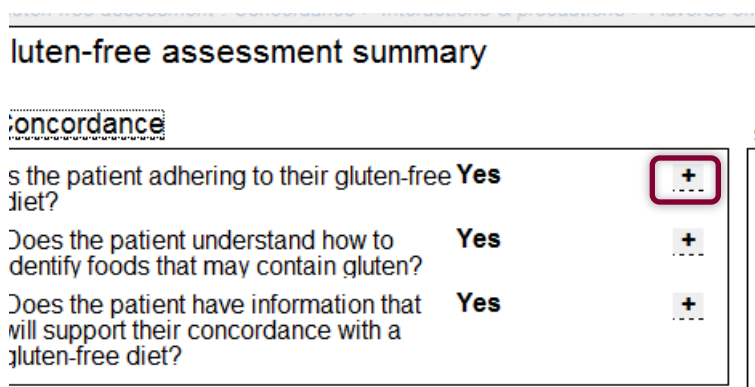
## 8.5 Create associated care issue and Care Issue Outcomes using prepopulated text

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 Summary page that you want to create a care issue / care issue outcome for, (Figure 8-8)



Gluten-free assessment summary




Concordance	
Is the patient adhering to their gluten-free diet?	Yes 
Does the patient understand how to identify foods that may contain gluten?	Yes 
Does the patient have information that will support their concordance with a gluten-free diet?	Yes 

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

- The system will display the support tool assessment “Record care issue” page (Figure 8-9)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 13:47

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**SMITH, Johnathan (Mr)** Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231  
 Preferred name John Patient Details Last Modified On 03-Dec-2008 By InitialUser  
 Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ Phone and email 01506 000-000

### Record care issue for support tool assessment

\* Means a field requires data

<b>Care issue</b>	
Description of care issue	Patient may not be adhering to their gluten free diet *
<b>Care issue outcome</b>	
Desired Outcome	Patient aware that adherence to a gluten free diet is vital for treatment and good health *
Action	<div></div>
Action By	Patient
Response	<div></div>
Status	Open
Review By	<div></div> e.g: 31-07-2013 for the 31st of July 2013

Figure 8-9: 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.

## 8.6 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 assessment summary page, Figure 8-7.
- The care issue form is displayed (Figure 6-15)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 13:47

Pharmacy Care Record 

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<b>SMITH, Johnathan (Mr)</b>		<i>Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231</i>	
<i>Preferred name John</i>		<i>Patient Details Last Modified On 03-Dec-2008 By InitialUser</i>	
<i>Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ</i>		<i>Phone and email 01506 000-000</i>	

**Record care issue for support tool assessment** \* Means a field requires data


<b>Care issue</b>	Description of care issue <input style="width: 95%;" type="text" value=""/>
<b>Care issue outcome</b>	Desired Outcome <input style="width: 95%;" type="text" value=""/>
Action	<input style="width: 95%;" type="text" value=""/>
Action By	<div style="border: 1px solid black; padding: 2px;">Patient</div>
Response	<input style="width: 95%;" type="text" value=""/>
Status	Open
Review By	<div style="border: 1px solid black; padding: 2px;"> <input style="width: 95%;" type="text" value=""/> <div style="float: right; font-size: 10px;">  </div> </div> <p style="font-size: 8px; margin-top: 5px;">e.g: 31-07-2013 for the 31st of July 2013</p>

Figure 8-10: 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 assessment summary page”
- The newly created care issue / care issue outcome will be listed in the “care issues associated with this assessment” grid (Figure 6-16, Figure 8-12)

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on	
> Poor inhaler technique		13-Apr-2012	<a href="#">View</a>

[Add](#)

Figure 8-11: 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.

### Gluten-free assessment summary

#### Concordance

Is the patient adhering to their gluten-free diet?	Yes	<a href="#">+</a>
Does the patient understand how to identify foods that may contain gluten?	Yes	<a href="#">+</a>
Does the patient have information that will support their concordance with a gluten-free diet?	Yes	<a href="#">+</a>

#### Interactions and precautions

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	Unanswered	<a href="#">+</a>
Is the patient aware of how to take these medicines properly, if indicated?	Unanswered	<a href="#">+</a>

Use [+](#) to add care issues for the specific question.

#### Adverse effects

Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?	Unanswered	<a href="#">+</a>
Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?	Unanswered	<a href="#">+</a>
Is the patient aware that adverse effects should be reported?	Unanswered	<a href="#">+</a>

#### Monitoring

Is the patient aware of how many gluten-free units they are able to order each month?	Unanswered	<a href="#">+</a>
Gluten-free annual health check not completed in pharmacy	No	
What date is the patient due to receive their gluten-free annual health check at the pharmacy?	Unanswered	<a href="#">+</a>
Height or weight or both not available	No	
Height (m)	Unanswered	
Weight (kg)	Unanswered	
BMI	Unanswered	<a href="#">+</a>

### Care issues associated with this assessment

Care issue	Earliest review by	Last modified on	
> Patient may not be adhering to their gluten free diet		14-Oct-2013	<a href="#">View</a>

[Add](#)

Figure 8-12: Care Issues Associated with This Assessment

## 8.7 Set the status of a Gluten-free support tool assessment to “Completed”

### To “Complete” a Gluten-free support tool assessment:

- From the GLUTEN-FREE review page, select the “Complete assessment” button in the “Assessment completion” section of the Review screen (Figure 6-17)
- The system will set the status of the assessment to completed and refresh the page (Figure 8-14)
- The assessment completion details will be updated:
  - Assessment Complete = Yes
  - Assessment completed by – Pharmacist ID
  - Assessment completed on - date

Does the patient have information that will support their concordance with a gluten-free diet? **Unanswered** +

consuming foods that contain gluten? **Unanswered** +

Is the patient aware that adverse effects should be reported? **Unanswered** +

**Interactions and precautions**

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements? **Unanswered** +

Is the patient aware of how to take these medicines properly, if indicated? **Unanswered** +

Use + to add care issues for the specific question.

**Monitoring**

Is the patient aware of how many gluten-free units they are able to order each month? **Unanswered** +

Gluten-free annual health check not completed in pharmacy **No**

What date is the patient due to receive their gluten-free annual health check at the pharmacy? **Unanswered** +

Height or weight or both not available **No**

Height (m) **Unanswered**

Weight (kg) **Unanswered**

BMI **Unanswered** +

**Care issues associated with this assessment**

Care issue	Earliest review by	Last modified on
> Patient may not be adhering to their gluten free diet		14-Oct-2013 <a href="#">View</a>

[Add](#)

**Assessment completion**

Assessment complete **No**

Assessment completed by

Assessment completed on

[Complete assessment](#)

[return to Patient Home Page](#)

Figure 8-13: Assessment completion details for an “Open” assessment

**Assessment completion**

Assessment complete **Yes**

Assessment completed by **Testuser**

Assessment completed on **22-Oct-2013**

[return to Patient Home Page](#)

Figure 8-14: Assessment completion details updated

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

## 8.8 Access existing Gluten-free support tool assessments from the Patient Home page

“Open “or “Completed” Gluten-free support tool assessments can be accessed from the “Gluten-free” tab on the Patient Home page.

### To edit an “Open” Gluten-free support tool assessment:

- Select the “Edit” link for the Gluten-free support tool assessment you want to edit
- The system will navigate to the Gluten-free support tool assessment Review page

### To view a “Completed” Gluten-free support tool assessment:

- Select the “View” link for the Gluten-free support tool assessment you want to View
- The system will navigate to the Gluten-free support tool assessment summary page

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Mon, Oct 14, 2013 14:14

Pharmacy Care Record 

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<b>SMITH, Johnathan (Mr)</b>	Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231
Preferred name John	Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ	Phone and email 01506 000-000

[Print Care Issues](#) [Edit](#)

Pharmaceutical care plan	High risk medicine assessments	New medicine interventions	Support tools
--------------------------	--------------------------------	----------------------------	---------------

Support tool assessments						
Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
No records to display.						

[Start support tool assessment](#)

Figure 8-15: Support Tools tab

### 8.8.1 Example question page for completed assessment (Read only)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Oct 22, 2013 15:56

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Hospital](#) [Logout](#)

<b>SMITH, Johnathan (Mr)</b>	Born 03-Feb-2001 (12y 8m) Gender Male CHI No. 0102031231
Preferred name John	Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ	Phone and email 01506 000-000

[Gluten-free assessment](#) **Concordance** > [Interactions & precautions](#) > [Adverse effects](#) > [Monitoring](#) > [Review](#)

### Concordance

Is the patient adhering to their gluten-free diet?

Does the patient understand how to identify foods that may contain gluten?

Does the patient have information that will support their concordance with a gluten-free diet?

YesNo

YesNo

YesNo

**Read only**

Coeliac Disease is an autoimmune condition. Ingesting gluten causes the villi of the small intestine to react by flattening. This reduces the absorptive capacity of the intestine.

**Actions:**

**Check the patient's feelings about how they are managing with their diet.**

**Check if the patient is confident that they can identify foods that contain gluten.**

**Enquire if the patient is aware of the symptoms caused by eating gluten. There is wide variation in the severity of symptoms; some patients do not experience any symptoms.**

**Signpost the patient to Coeliac UK ([www.coeliac.org.uk](http://www.coeliac.org.uk)).**

**Record any care issues in the patient's care plan and agree desired outcomes and actions.**

**Refer to the community dietitian, patient's GP, or as per healthboard guidelines.**

[Next - Interactions & precautions](#)

[return to Gluten-free Review Page](#)

Figure 8-16: Read only – completed assessment

**Note:** All data for a completed Gluten-free support tool assessment is shown as read only (Figure 8-16). This means that responses for a completed Gluten-free support tool assessment cannot be edited; however, it is still possible to add a Care Issue / Care Issue Outcome to a completed Gluten-free support tool assessment.

## 9 Smoking Cessation Support Tool Assessment

### 9.1 Overview

#### 9.1.1 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.

#### 9.1.2 PCR smoking cessation support tool assessment overview

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

- Start a smoking cessation support tool assessment
- Record initial data capture MDS information
- Confirm quit date and submit MDS Start
- View and maintain initial data capture
- View, maintain and submit 4 and 12 week MDS information
- View and record patient contacts
- View and record patient contact attempts
- Validate MDS information prior to submission
- View MDS submission deadline alerts
- Submit 4 and 12 week MDS information for external processing
- View smoking cessation reports

#### 9.1.3 Key information

- A unique reference is created for each quit attempt when the quit date is confirmed.
- The MDS submission deadlines are calculated in number of weeks from the quit date
- It is not possible to submit a twelve week MDS if the quit attempt failed at the four week follow up.
- A submission will expire and will not be able to be submitted via PCR if not completed within the allowable submission window.

## 9.2 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 9-1.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Wed, Jun 4, 2014 14:46

Pharmacy Care Record **NHS**  
SCOTLAND

Search Protocols Reports Change password Manage profile Yellow card Help Logout

**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444  
Patient Details Last Modified On 05-Jun-2014 By Testuser

Address Phone and email

Print Care Issues Edit

Pharmaceutical care plan High risk medicine assessments New medicine interventions Support tools

**Support tool assessments**

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
No records to display.						

**Smoking cessation assessments**

Quit date	Status	MDS	Last recorded contact	Quit attempt in
No records to display.				

Start support tool assessment

Figure 9-1: Start support tool assessment

- Select “Smoking Cessation” from the dropdown menu marked “Please select the support tool”, Figure 9-2.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Never

Pharmacy Care Record **NHS**  
SCOTLAND

Search Protocols Reports Change password Manage profile Yellow card Help Logout

**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444  
Patient Details Last Modified On 14-May-2014 By Testuser

Address 3 Apples Avenue, G12 8DG Phone and email 10234000000

**Support tool assessment**

Please select the support tool

Smoking cessation

Start Cancel

Figure 9-2: Please select the support tool

- Click “Start”. The system will display the “Initial Data Capture” page, Figure 9-5.

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

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

## Validation

If an open smoking cessation support tool assessment exist at the same pharmacy an error message will be displayed (Figure 9-3) and it will not be possible to create a new assessment.

“Please complete the open smoking cessation support tool assessment before initiating another assessment.”

Preferred name John	Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ	Phone and email 01506 000-000

### Support tool assessment

Please select the support tool

Smoking cessation ▼

Please complete the open smoking cessation support tool assessment before initiating another assessment.

Start Cancel

Figure 9-3: open smoking cessation support tool assessment exists

If an assessment has been started at another pharmacy within the last 12 weeks an error message will be displayed (Figure 9-4) and it will not be possible to create a new assessment.

Address	Phone and email
---------	-----------------

### Support tool assessment

Please select the support tool

Smoking cessation ▼

Smoking cessation support tool assessment cannot be started because the patient has had an assessment started at another pharmacy within the last twelve weeks.

Start Cancel

Figure 9-4: Assessment started at another pharmacy within 12 weeks

### 9.3 Initial Data Capture

The Initial Data Capture 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

Information entered or selected on the Initial Data Capture 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 Initial Data Capture:**

- Select, or where applicable enter text, for all sections of the Initial Data Capture - or as much as is known.
- Click save, the Review Page is displayed, Figure 9-7.



Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, May 20, 2014 15:49

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**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
 Address G12 8DG Phone and email

### Smoking cessation: initial data capture

**Consent**  
 Does the client consent to follow up? Please select  
 By participating in the smoking cessation service the client has agreed to be contacted by NHS Scotland representatives in order to follow up their progress and smoking status and has agreed to provide a telephone number to facilitate follow up.

**Client information**  
 Gender Male  
 If female, pregnant? ☐  
 What is the client's ethnic group? White Scottish  
 If 'Other' chosen above, please specify   
 What is the client's employment status? In paid employment  
 If 'Other' chosen above, please specify

**Tobacco use and quit attempts**  
 On average, how many cigarettes does the client usually smoke per day? 10 or less  
 How soon after waking does the client usually smoke their first cigarette? Within 5 minutes  
 How many times has the client tried to quit smoking in the past year? No quit attempts

**Referral and assessment context**  
 Date referred to service   
 Referral source(s)  

Self-referral	<input checked="" type="checkbox"/>	Pharmacist	<input type="checkbox"/>
Dentist	<input type="checkbox"/>	Practice nurse	<input type="checkbox"/>
GP	<input type="checkbox"/>	Prison	<input type="checkbox"/>
Health visitor	<input type="checkbox"/>	Smokeline	<input type="checkbox"/>
HealthPoint	<input type="checkbox"/>	Stop smoking roadshow	<input type="checkbox"/>
Hospital	<input type="checkbox"/>	Incentive scheme	<input type="checkbox"/>
Midwife	<input type="checkbox"/>	Other (please specify)	<input type="text"/>

 If 'Other' chosen above, please specify   
 Intervention setting(s)  

Primary care	<input type="checkbox"/>	Workplace	<input type="checkbox"/>
Hospital - Inpatient	<input type="checkbox"/>	Educational establishment	<input type="checkbox"/>
Hospital - Outpatient	<input type="checkbox"/>	Non-NHS community venue	<input type="checkbox"/>
Pharmacy	<input checked="" type="checkbox"/>	Home	<input type="checkbox"/>
Prison	<input type="checkbox"/>	Other (please specify)	<input type="text"/>

 If 'Other' chosen above, please specify   
 Date of initial appointment 21-05-2014  
 Intervention(s) used in this quit attempt  

One to one sessions	<input checked="" type="checkbox"/>	Couple/family based support	<input type="checkbox"/>
Group support (closed groups)	<input type="checkbox"/>	Other (please specify)	<input type="text"/>
Telephone support	<input type="checkbox"/>	Unknown	<input type="checkbox"/>
Group support (open/rolling groups)	<input type="checkbox"/>		

 If 'Other' chosen above, please specify   
 Shared care between pharmacy and non-pharmacy services?  
☐ Yes ☒ No

**Pharmaceutical usage**  
 Pharmaceutical usage NRT only (combination therapy)  
 Total number of weeks of known product use 0

Save Cancel

Figure 9-5: Smoking Cessation Initial Data Capture

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 9-6.

This additional information is not included in the MDS submissions.

<p>If 'Other' chosen above, please specify</p> <p>Shared care between pharmacy and non-pharmacy services?</p>	<p>Group support (open/rolling groups) <input type="checkbox"/></p> <p><input type="text"/></p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p><b>Pharmaceutical usage</b></p>	
<p>Pharmaceutical usage</p> <p>Total number of weeks of known product use</p>	<p>NRT and Varenicline (change in product) <input type="text"/></p> <p>0 <input type="text"/></p>
<p><b>A Varenicline risk assessment must be completed prior to supply</b></p>	
<p>Does the Varenicline risk assessment indicate that the patient's GP should be contacted to confirm Varenicline appropriateness?</p> <p>I confirm that I am aware the GP must be informed that the patient will begin on Varenicline <input type="checkbox"/></p>	<p>Yes - GP has been contacted <input type="text"/></p>
<p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>	

Figure 9-6: Pharmaceutical usage includes Varenicline

**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 initial data capture 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).

## 9.4 Review assessment details (after Initial data capture)

The review page is displayed after the initial data capture is saved.

All further steps in the process (confirm quit date, record contacts, record contact attempt, submit 4 week MDS, submit 12 week MDS etc.) are initiated from links on the review page.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, May 20, 2014 15:49

Pharmacy Care Record **NHS**  
 SCOTLAND

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**WILLIAMS, Steven**

Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444

Patient Details Last Modified On 21-May-2014 By Testuser

Address G12 8DG

Phone and email

### Smoking cessation

#### Initial data capture

##### Client information

Gender Male  
 Pregnant No  
 Ethnic group White Scottish  
 Ethnic group (other)  
 Employment status In paid employment  
 Employment status (other)

##### Tobacco use and quit attempts

Cigarettes smoked 10 or less  
 Time after waking Within 5 minutes  
 Number of quit attempts No quit attempts

##### Pharmaceutical usage

Pharmaceutical usage NRT only (combination therapy)  
 Pharmaceutical usage weeks 0

##### Referral and intervention context

Referral date Unanswered  
 Referral source Self-referral  
 Referral source (other)  
 Intervention setting(s) Pharmacy  
 Intervention setting (other)  
 Date of initial appointment 21-May-2014  
 Intervention(s) used in this quit attempt One to one sessions  
 Intervention (other)  
 Is shared care No

##### Consent

Consent to follow up Unanswered

Quit date Not set

Next action [Start quit attempt and confirm quit date](#)

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

#### Assessment completion

Assessment complete  
 Assessment completed by  
 Assessment completed on

Please select

Unique reference Not set

Unanswered questions shown as "Unanswered".

Figure 9-7: Review Page after Initial Data Capture

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

### Initial Data Capture

A summary of the information recorded in the initial data capture is displayed on the review page. If no information was provided for a specific question this is shown as “Unanswered”

**Quit date**

The quit date is shown as not set. This is confirmed in the next step.

**Next Action**

The options in this section vary depending on the state of the assessment. After the initial data capture this will show an option to “Start Quit Attempt and Confirm quit date”. (As the assessment progresses, this section will display options to submit the 4 and 12 week MDS.)

**Care issues associated with this assessment**

Option to add a care issue is available.

**Assessment completion**

Function to complete an assessment in PCR. This is independent of the MDS submission process. More details of this function are provided in section 9.15.

## 9.5 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 MDS submissions are calculated.

### To start a quit attempt and confirm quit date

- Select "Start quit attempt and confirm quit date" from the "Next action" section, Figure 9-8. The "Confirm quit date and record intervention" page is displayed, Figure 9-9.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Never

Pharmacy Care Record 

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**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 14-May-2014 By Testuser  
Address 3 Apples Avenue, G12 8DG Phone and email 10234000000

### Smoking cessation intervention

#### Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	01-May-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	Unanswered
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	Unanswered
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	Consent	
Pharmaceutical usage		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

Quit date Not set

Next action **Start quit attempt and confirm quit date**

#### Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

Figure 9-8

## 9.6 Confirm quit date and record contact

By default, the “Record contact” checkbox is selected. This allows you to record a “contact” at the same time as setting the quit date. If you do not want to record a contact then deselect this checkbox.

### To Confirm quit date (with option to record contact):

- Enter the quit date you have agreed with the patient in the “confirm quit date and record contact” section.
- Complete contact details (date, contact type, has the patient smoked, CO reading, product, product and contact notes)
- 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”.

Address **5 Oakbank Avenue, Glasgow, G12 3NR** Phone and email **10234567890**

Client information		Referral and intervention context	
Gender	Male	Referral date	02-Jun-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Home
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	10-Jun-2014
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	4 or more times	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

### Confirm quit date and record contact

Quit date

☒ Record contact

Contact date

Contact type

Has the patient smoked? ☐ Yes ☐ No

CO Reading  ppm

Product

<input type="checkbox"/> 16h patch	<input type="checkbox"/> 24h patch	<input type="checkbox"/> Lozenge	<input type="checkbox"/>
<input type="checkbox"/> Gum	<input type="checkbox"/> Nasal spray	<input type="checkbox"/> Inhalator	<input type="checkbox"/>
<input type="checkbox"/> Sub-lingual tablet	<input type="checkbox"/> Bupropion	<input type="checkbox"/> Varenicline	<input type="checkbox"/>

Product and contact notes

[return to Smoking Cessation Review Page](#)

Figure 9-9: Confirm quit date (with option to record contact)

**To confirm quit date (without Recording a contact):**


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

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Wed, Jun 4, 2014 14:50

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<b>WILLIAMS, Steven (Mr)</b>		Born <b>15-Feb-1945 (69y)</b> Gender <b>Male</b> CHI No. <b>1111111111</b>	
		Patient Details Last Modified On <b>11-Jun-2014</b> By <b>Testuser</b>	
Address <b>5 Oakbank Avenue, Glasgow, G12 3NR</b>		Phone and email <b>10234567890</b>	
<b>Client information</b> Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) <b>Tobacco use and quit attempts</b> Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts Unknown <b>Pharmaceutical usage</b> Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0		<b>Referral and intervention context</b> Referral date 02-Jun-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment 09-Jun-2014 Intervention(s) used in this quit attempt One to one sessions Intervention (other) Is shared care No <b>Consent</b> Consent to follow up Yes	

**Confirm quit date and record contact**

Quit date	<input type="text"/>	
<input type="checkbox"/> Record contact		
		<input type="button" value="Confirm quit date"/> <input type="button" value="Cancel"/>

[return to Smoking Cessation Review Page](#)

**Figure 9-10: Confirm quit date (Without recording a contact)**

If any of the initial data capture 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 contact” section.

The missing or invalid information is highlighted in red text, Figure 9-11.

- The “Edit Initial Data Capture” link allows the patient to update any missing information from the Initial Data Capture.
- The “Edit Patient” link allows the user to edit address, telephone and post code information held in the patient profile. This information is also submitted as part of the minimum dataset.

Once all missing or invalid information is corrected the “confirm quit date and record contact” section is displayed.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Never

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

<b>WILLIAMS, Steven</b>		Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444	
		Patient Details Last Modified On 14-May-2014 By Testuser	
Address 3 Apples Avenue, G12 8DG		Phone and email 10234000000	

<b>Client information</b>		<b>Referral and intervention context</b>	
Gender	Male	Referral date	01-May-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	Unanswered
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	Unanswered
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

Please correct the following validation errors before attempting to proceed:

Date of initial appointment is a required field.

Intervention(s) is a required field.

[Edit initial data capture](#) [Edit patient](#)

Figure 9-11: Validation errors shown in red text



## 9.7 Review Assessment Details (Quit Date Confirmed)

The review page is displayed once the quit date is confirmed, Figure 9-12.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, May 20, 2014 15:49

Pharmacy Care Record **NHS**  
 SCOTLAND

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**WILLIAMS, Steven**

Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444  
 Patient Details Last Modified On 21-May-2014 By Testuser

Address 3 Apples Avenue, G12 8DG
 Phone and email 102340000000

### Smoking cessation

#### Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	13-May-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	21-May-2014
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	10 or less	Intervention (other)	
Time after waking	Within 5 minutes	Is shared care	No
Number of quit attempts	No quit attempts	Consent	
Pharmaceutical usage		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

Quit date 23-May-2014  
 Next action Release 4 week MDS  
[View submitted minimum data set](#)  
 Minimum dataset
 

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	21-May-2014
Four week	20-Jun-2014 - 04-Jul-2014	Open	Not submitted		
Twelve week	01-Aug-2014 - 29-Aug-2014	Open	Not submitted		

#### Contact

Week	Contact date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
0	21-May-2014	Face to face	No	Not recorded	Gum		Testuser	21-May-2014

Record

#### Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
No records to display.				

Record

#### Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

Add

#### Assessment completion

Assessment complete  
 Assessment completed by  
 Assessment completed on  
 Please select

Unique reference PCR-C333F2A2-1B01-4862-8DD4-8C4BDA3E8204

Figure 9-12: 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:

**Initial Data Capture (Summary)**

A summary of the initial data capture.

**Quit Date**

Once the Quit Date is Confirmed it is displayed on the Smoking Cessation Review Page.

**Next Action**

This section shows the "Release 4 week MDS" link. The link is disabled until it is between 4-6 weeks from the quit date. (This will also show the "Release 12 week MDS" link when the current date is within the target date submission window)

**View Submitted Minimum Dataset link**

Select this link to view all submitted MDS data.

**Minimum Dataset**

A summary of the status of the Start, 4 week and 12 week MDS.

**Contacts**

A summary of any contacts that have been created

**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

**Assessment completion**

Option to complete an assessment. When complete, completion date and reason are shown.

**Unique Reference**

Unique reference for quit attempt.

## 9.8 Submit 4 Week Data

The 4 week MDS 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 initial data capture together with additional information shown below.

### To submit 4 week data:

- Select release 4 week MDS link from the next action section of the review page.
- Enter required information
- Click submit 4 week data button

There is a link to update the initial data capture details if any have changed. For example "Pharmaceutical usage weeks".

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**WILLIAMS, Steven**
Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 14-May-2014 By Testuser

Address 3 Apples Avenue, G12 8DG
 Phone and email 1023400000

Client information		Referral and intervention context	
Gender	Male	Referral date	01-Apr-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	14-Apr-2014
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

**Submit four week minimum dataset**

Was the client successfully contacted for 1-month follow up? Yes

Date follow-up carried out 14-05-2014

Client withdrawn from service at time of follow-up? ☐ Yes ☒ No

Has the client smoked at all (even a puff) in the last two weeks? No

CO reading confirms quit? Yes

Reason CO reading not taken? Please select

If initial data capture has changed please edit the values using the following link

[Initial data capture](#)

[Submit four week data](#)
[Cancel](#)

[return to Smoking Cessation Review Page](#)

Figure 9-13: Submit 4 week data

Before the 4 week minimum data set information can be submitted, any missing or invalid data is highlighted, Figure 9-14.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Never

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<b>WILLIAMS, Steven</b>		Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444	
		Patient Details Last Modified On 14-May-2014 By Testuser	
Address 3 Apples Avenue, G12 8DG		Phone and email 10234000000	
<b>Client information</b> Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) <b>Tobacco use and quit attempts</b> Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts No quit attempts <b>Pharmaceutical usage</b> Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0		<b>Referral and intervention context</b> Referral date 01-Apr-2014 Referral source Unanswered Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment 14-Apr-2014 Intervention(s) used in this quit attempt One to one sessions Intervention (other) Is shared care No <b>Consent</b> Consent to follow up Yes	

Please correct the following validation errors before attempting to proceed:

Referral source is a required field.

[Edit initial data capture](#) [Edit patient](#)

[return to Smoking Cessation Review Page](#)

Figure 9-14: 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.**

## **9.9 Review Assessment Details (4 Week Data Submitted)**

Now that the 4 week MDS has been submitted, the minimum dataset section shows the overall MDS status as “Validated” with the release status shown as “Submitted”, Figure 9-15.

The assessment must be accessed and updated with any contacts or contact attempts that occur in the weeks leading up to the 12 week submission. Where appropriate, care issues can also be recorded.

Pharmacy: 12345 - Pharmacy Two  
 User: Testuser - Jane Smith  
 Last login: Thu, Jun 5, 2014 13:49

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**WILLIAMS, Steven** *Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444*  
*Patient Details Last Modified On 05-Jun-2014 By Testuser*  
 Address 3 Apples Avenue, PA3 3BB Phone and email 10234567890

### Smoking cessation

#### Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	01-May-2014
Pregnant	No	Referral source	Pharmacist
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Primary Care Hospital - Inpatient Educational establishment Non-NHS community venue
Employment status	In paid employment		
Employment status (other)			
Tobacco use and quit attempts		Intervention setting (other)	
Cigarettes smoked	11 to 20	Date of initial appointment	03-May-2014
Time after waking	6 to 30 minutes	Intervention(s) used in this quit attempt	One to one sessions Group support (closed groups) Couple/family based support
Number of quit attempts	No quit attempts		
Pharmaceutical usage		Intervention (other)	
Pharmaceutical usage	None	Is shared care	No
Pharmaceutical usage weeks	0	Consent	
		Consent to follow up	Yes

Quit date 05-May-2014

Next action Release 12 week MDS

[View submitted minimum data set](#)

#### Minimum dataset

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	05-Jun-2014
Four week	02-Jun-2014 - 16-Jun-2014	Validated	Submitted	Testuser	05-Jun-2014
Twelve week	14-Jul-2014 - 11-Aug-2014	Open	Not submitted		

#### Contact

Week	Contact date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
No records to display.								

[Record](#)

#### Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
No records to display.				

[Record](#)

#### Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
> CARE ISSUE DESCRIPTION TEXT	27-Jun-2014	05-Jun-2014 <a href="#">View</a>

[Add](#)

#### Assessment completion

Assessment complete  
 Assessment completed by  
 Assessment completed on  
 Please select

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156

Figure 9-15: 4 week data submitted

The "Next Action" is shown as "Release 12 week MDS". This link is not enabled until the 12 week submission window is reached (10-14 weeks from quit date).

## 9.10 Submit 12 Week Data

The 12 week MDS 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 initial data capture together with additional information shown below.

### To submit the 12 week data:

- Select "Release 12 week MDS" link from the next action section of the review page.
- Enter required information
- Click submit 12 week data button, the review page is displayed.

Pharmacy: 12345 - Pharmacy Two  
User: Testuser - Jane Smith  
Last login: Thu, Jun 5, 2014 13:49

Pharmacy Care Record 

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**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 05-Jun-2014 By Testuser  
Address 3 Apples Avenue, PA3 3BB Phone and email 10234567890

Client information		Referral and intervention context	
Gender	Male	Referral date	08-Jan-2014
Pregnant	No	Referral source	Pharmacist
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Primary Care Hospital - Inpatient Educational establishment Non-NHS community venue
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	05-Feb-2014
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	One to one sessions Group support (closed groups) Couple/family based support
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	None		
Pharmaceutical usage weeks	0		

Quit date 05-Mar-2014

### Submit twelve week minimum dataset

Was the client successfully contacted for 3-month follow-up?

Date follow-up carried out

Has the client smoked at all since the 1-month follow-up?

CO reading confirms quit?

Reason CO reading not taken?

If initial data capture has changed please edit the values using the following link

[Initial data capture](#)

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156  
[return to Smoking Cessation Review Page](#)

Figure 9-16: Submit 12 week data.

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

## 9.11 Review Assessment Details (12 Week data submitted)

Now that the 12 week MDS has been submitted, the minimum dataset section is complete for all MDS submissions; it shows the overall MDS status for Start, four week and twelve week as "Validated" with the release status for each shown as "Submitted", Figure 9-17.

Any Contacts 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 Action" section is no longer displayed on the page.

12 weeks

Quit date

13-Feb-2014

[View submitted minimum data set](#)

Minimum dataset

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	14-May-2014
Four week	13-Mar-2014 - 27-Mar-2014	Validated	Submitted	Testuser	14-May-2014
Twelve week	24-Apr-2014 - 22-May-2014	Validated	Submitted	Testuser	14-May-2014

Contact

Week	Intervention date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
14	14-May-2014	Face to face	No	Not recorded			Testuser	14-May-2014

Record

Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
14	14-May-2014	Telephone	Testuser	14-May-2014

Record

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

Add

Intervention completion

Intervention complete

Intervention completed by

Intervention completed on

Please select

Complete

Unique reference

PCR-6893717A-D279-40E8-A46F-D8F290BAF4B7

Figure 9-17



## 9.12 Record Contact

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

### To record a contact:

- Select the “Record” link at the bottom right hand side of the “Contact summary” on the review page
- Enter required information
- Click “record contact”, details are saved the review page is displayed.

Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	13-Feb-2014
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	More than 30	Intervention (other)	
Time after waking	Within 5 minutes	Is shared care	No
Number of quit attempts	No quit attempts	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	NRT only (one product at any one time)		
Pharmaceutical usage weeks	0		

### Contact

Contact date	<input type="text"/>		
Contact type	<input type="text" value="Please select"/>		
Has the patient smoked?	<input type="radio"/> Yes <input type="radio"/> No		
CO Reading	<input type="text" value="Please select"/> ppm		
Product	<input type="checkbox"/> 16h patch <input type="checkbox"/> Gum <input type="checkbox"/> Sub-lingual tablet	<input type="checkbox"/> 24h patch <input type="checkbox"/> Nasal spray <input type="checkbox"/> Bupropion	<input type="checkbox"/> Lozenge <input type="checkbox"/> Inhalator <input type="checkbox"/> Varenicline
Product and contact notes	<input type="text"/> <input type="text"/> <input type="text"/>		
		<input type="button" value="Record contact"/>	<input type="button" value="Cancel"/>

Figure 9-18: Record Contact

## 9.13 Record 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.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Never

Pharmacy Care Record **NHS**  
SCOTLAND

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**WILLIAMS, Steven**

Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444

Patient Details Last Modified On 14-May-2014 By Testuser

Address 3 Apples Avenue, G12 8DG

Phone and email 10234000000

### Smoking cessation intervention: record contact attempt

Client information		Referral and intervention context	
Gender	Male	Referral date	13-May-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	14-May-2014
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

### Contact attempt

Contacted attempted on	<input type="text" value="20-05-2014"/>
Contact type	<input type="text" value="Face to face"/>
<input type="button" value="Record contact attempt"/> <input type="button" value="Cancel"/>	

Figure 9-19: record contact attempt

## 9.14 Support tools overview

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

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Wed, Jun 11, 2014 11:06

Pharmacy Care Record 

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**WILLIAMS, Steven (Mr)** *Born 15-Feb-1945 (69y) Gender Male CHI No. 1111111111*  
*Patient Details Last Modified On 11-Jun-2014 By Testuser*  
 Address 5 Oakbank Avenue, Glasgow, G12 3NR Phone and email 10234567890

[Print Care Issues](#) [Edit](#)

[Pharmaceutical care plan](#) [High risk medicine assessments](#) [New medicine interventions](#) [Support tools](#)

### Support tool assessments

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Gluten-free	0	Open	11-Jun-2014	Testuser		<a href="#">Review</a>

### Smoking cessation assessments

	Quit date	Status	MDS	Last recorded contact	Quit attempt in	
>		Open	Open			<a href="#">Review</a>
>	11-Jun-2014	Closed	Started		Week 1	<a href="#">Review</a>

[Start support tool assessment](#)

Figure 9-20: Support tools overview

## 9.15 Smoking 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 minimum dataset submissions. This is necessary because some board areas have enhanced smoking cessation services that go beyond the 12 week MDS submission and Pharmacies may wish to keep an assessment record open beyond the 12 week MDS and to continue recording patient contacts.

As with other assessments in PCR a smoking cessation assessment must be completed before a new assessment can be begin. If a patient wanted to restart a quit attempt (because they had smoked) the pharmacy will need to complete the existing assessment (not necessarily waiting for the next MDS submission) before beginning a new one.

Valid PCR completion statuses are:

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

Quit date      13-Feb-2014  
  
[View submitted minimum data set](#)  
**Minimum dataset**  

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	14-May-2014
Four week	13-Mar-2014 - 27-Mar-2014	Validated	Submitted	Testuser	14-May-2014
Twelve week	24-Apr-2014 - 22-May-2014	Validated	Submitted	Testuser	14-May-2014

  
**Contact**  

Week	Intervention date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
14	14-May-2014	Face to face	No	Not recorded			Testuser	14-May-2014

  
[Record](#)  
  
**Contact attempts**  

Week	Contact attempted on	Contact type	Recorded by	Recorded on
14	14-May-2014	Telephone	Testuser	14-May-2014

  
[Record](#)  
  
**Care issues associated with this assessment**  

Care issue	Earliest review by	Last modified on
No records to display.		

  
[Add](#)  
  

**Intervention completion**  
Intervention complete  
Intervention completed by  
Intervention completed on  

Please select

  
Unique reference      PCR-6893717A-D279-40E8-A46F-D8F290BAF4B7

Figure 9-21: Intervention completion

Note: Once set to complete, minimum data set information will be read only.

**To complete a smoking cessation intervention:**

- From the Intervention completion section on the smoking cessation review page select the “complete” button
- The “Confirm Completion message is displayed, Figure 9-22.
- Select “Yes” to complete intervention or “No” to cancel

**Smoking cessation**

Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	18-Mar-2015
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Primary Care
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	Unanswered
<b>Tobacco use and quit attempts</b>		Intervention(s) used in this quit attempt	Group support (closed groups)
Cigarettes smoked	10 or less	Intervention (other)	
Time after waking	6 to 30 minutes		
Number of quit attempts	Once		
<b>Pharmaceutical usage</b>			
Pharmaceutical usage	NRT one t		
Pharmaceutical usage weeks	0		

Quit date Not set

Next action Start quit attempt and

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
No records to display.		

[Add](#)

**Assessment completion**

Assessment complete

Assessment completed by

Assessment completed on

Unsuccessful

Unique reference Not set

[return to Patient Home Page](#)

Figure 9-22: Smoking Cessation Confirm Completion

## 9.16 View Submitted minimum data set

This read only view of submitted minimum dataset is updated with each submission.

The example in Figure 9-23 shows all submissions.

Pharmacy: 12345 - Pharmacy Two  
 User: Testuser - Jane Smith  
 Last login: Thu, Jun 5, 2014 13:49

[Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

**WILLIAMS, Steven** Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444  
Patient Details Last Modified On 05-Jun-2014 By Testuser  
 Address 3 Apples Avenue, PA3 3BB Phone and email 10234567890

#### Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	08-Jan-2014
Pregnant	No	Referral source	Pharmacist
Ethnic group	White Scottish	Intervention setting(s)	Primary Care Hospital - Inpatient Educational establishment Non-NHS community venue
Employment status	In paid employment	Date of initial appointment	05-Feb-2014
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	One to one sessions Group support (closed groups) Couple/family based support
Cigarettes smoked	11 to 20	Is shared care	No
Time after waking	6 to 30 minutes	<b>Consent</b>	
Number of quit attempts	No quit attempts	Consent to follow up	Yes
Pharmaceutical usage			
Pharmaceutical usage	None		
Pharmaceutical usage weeks	0		

Quit date 05-Mar-2014

#### Four week submission

Was the client successfully contacted for 1-month follow up?	Yes
Date follow-up carried out	05-Jun-2014
Client withdrawn from service at time of follow-up?	No
Has the client smoked at all (even a puff) in the last two weeks?	No
CO reading confirms quit?	CO reading not taken

#### Twelve week submission

Was the client successfully contacted for 3-month follow up?	Yes
Date follow-up carried out	05-Jun-2014
Has the client smoked at all since the 1-month follow-up?	No

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156

[return to Smoking Cessation Review Page](#)

**Figure 9-23: Submitted minimum dataset**

## 10 Reports

### 10.1 Overview

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

- Care issue and patient report
- Core service registrations
- Care Issues
- New medicine intervention support tool reports
- Complex dispensing patient 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 10-1).
- The “Reports” summary page is displayed, Figure 10-2.

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Fri, May 1, 2015 14:12

Pharmacy Care Record 

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

Pharmacy Home

Last accessed: Fri, May 8, 2015 13:39

Totals		Gluten-free	
Patients for associated pharmacy		Gluten-free diet set to	
[41]		[41]	

Figure 10-1: reports link on high level menu

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Thu, Mar 3, 2016 21:17

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

## Reports

<b>Care issue and patient report</b>		
Outstanding care issues		
Patient report for associated pharmacy		
<b>Core service registrations reports</b>		
<b>CMS</b>		
CMS registered patients with a record in PCR	[5]	
CMS registered patients with NO record in PCR	[4]	
CMS registered patients with initial assessment complete set	[2]	
CMS registered patients with initial assessment complete NOT set	[3]	
<b>MAS</b>		
MAS registered patients with a record in PCR	[3]	
MAS registered patients with NO record in PCR	[2]	
MAS lapsed patients with a record in PCR	[3]	
MAS lapsed patients with NO record in PCR	[2]	
MAS registered and MAS lapsed patients with a record in PCR	[6]	
<b>Care issues</b>		
Open care issues with review date set	[126]	
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	[124]	
Open care issues with no outcome ever recorded	[34]	
Open care issues with no review date set	[10]	
<b>New medicine intervention support tool reports</b>		
All new medicine interventions for the pharmacy	[31]	
All open new medicine interventions	[17]	
Follow ups scheduled up to TODAY	[16]	
Follow ups scheduled up to 7 days from today	[16]	
Follow ups scheduled up to 14 days from today	[16]	
Follow ups scheduled up to 28 days from today	[16]	
Open new medicine interventions without any follow ups	[1]	
Completed new medicine interventions	[14]	
<b>Complex dispensing patient reports</b>		
Complex dispensing patient set to Yes	[4]	
Complex dispensing patient set to No	[4]	
Complex dispensing patient set to Not Recorded	[175]	
<b>Gluten-free reports</b>		
Diagnosed coeliac patients (historical)	[5]	
Gluten-free diet set to Yes	[14]	
Gluten-free diet set to No	[3]	
Gluten-free diet set to Not Recorded	[166]	
All gluten-free assessments	[22]	
All open gluten-free assessments	[9]	
All completed gluten-free assessments	[13]	
Annual health check scheduled up to 8 weeks from today	[11]	
Annual health check not completed in pharmacy	[6]	
<b>High risk medicine assessments support tool reports</b>		
All high risk medicine assessments for the pharmacy	[37]	
All open high risk medicine assessments	[6]	
All completed high risk medicine assessments	[31]	
<b>Smoking cessation reports</b>		
Open smoking cessation assessments	[40]	
Completed smoking cessation assessments	[27]	
No interactions in the last seven days	[39]	
<b>MDS</b>		
Expiring within the next seven days	[3]	
No quit date set	[1]	
Awaiting 4 or 12 week follow up	[3]	

Figure 10-2: 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 10-2.

**Note:**

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

There is no underlying report detail for MAS lapsed – only record count is shown there is no link to report detail.

## 10.2 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 10-3)

Pharmacy: 1234 - Pharmacy  
User: Testuser - Jane Smith  
Last login: Wed, Feb 3, 2016 15:24

Pharmacy Care Record **NHS**  
SCOTLAND

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### Outstanding care issues

Criteria	
Review by date, from	<input type="text"/> to <input type="text"/> <small>e.g: 31-07-2015 for the 31st of July 2015</small>
Care Issue Type	<input type="text" value="All"/>
<input type="button" value="Generate Report"/>	

**Figure 10-3: Outstanding care issues report criteria**

- Select the "Generate Report" button, all outstanding care issues for the associated pharmacy will be displayed Figure 10-4

**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

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Wed, Feb 3, 2016 15:24

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### Outstanding care issues

**Criteria**  
 Review by date, from  to  e.g: 31-07-2015 for the 31st of July 2015  
 Care Issue Type

[Generate Report](#)

Report																								
Patient	DOB	CHI	Postcode																					
> Miss Mary Cloud	31-Aug-1980	3108808036	NG7 5QX	<a href="#">View</a>																				
✓ Mr Eric Bond	31-Jan-1979	3101798558	BB2 2BB	<a href="#">View</a>																				
<div>Collapse</div> <table> <tr> <th>Care issue</th><th>Care issue type</th><th>Earliest review by</th><th>Modified date</th><th></th></tr> <tr> <td>Bond Care Issue 3</td><td>Standard</td><td>12-Feb-2008</td><td>30-Mar-2010</td><td><a href="#">View</a></td></tr> <tr> <td>Bond Care Issue 2</td><td>Standard</td><td>01-Jul-2010</td><td>30-Mar-2010</td><td><a href="#">View</a></td></tr> <tr> <td>Bond Care Issue 1</td><td>Standard</td><td>01-Aug-2010</td><td>30-Mar-2010</td><td><a href="#">View</a></td></tr> </table>					Care issue	Care issue type	Earliest review by	Modified date		Bond Care Issue 3	Standard	12-Feb-2008	30-Mar-2010	<a href="#">View</a>	Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	<a href="#">View</a>	Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	<a href="#">View</a>
Care issue	Care issue type	Earliest review by	Modified date																					
Bond Care Issue 3	Standard	12-Feb-2008	30-Mar-2010	<a href="#">View</a>																				
Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	<a href="#">View</a>																				
Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	<a href="#">View</a>																				
> Mrs Andrea MultitIssuesPastReview	01-Aug-1963	0108633942	EH54 7XY	<a href="#">View</a>																				
> Mr Gerald Down	17-Aug-1991	1708912932		<a href="#">View</a>																				
> Mrs Sarah SingleIssuePastReview	24-Dec-1987	2412874689	EH54 1BT	<a href="#">View</a>																				
> Mr Simon Ames	30-Jan-1989	3001893397	AA1 1AA	<a href="#">View</a>																				
> Mrs Latte Grande	23-Apr-1981	2304815146	EH28 1GL	<a href="#">View</a>																				
> Mrs Alison Sunder	19-Jun-1998	1906983666	EH9 2YR	<a href="#">View</a>																				
✓ Ann Hepple	<b>CMS</b> <b>MAS LAPSED</b> 18-Nov-1930	1811301223	HH1 1HH	<a href="#">View</a>																				
<table> <tr> <th>Care issue</th><th>Care issue type</th><th>Earliest review by</th><th>Modified date</th><th></th></tr> <tr> <td>Inhaler technique</td><td>Standard</td><td>03-Feb-2016</td><td>04-Feb-2016</td><td><a href="#">View</a></td></tr> </table>					Care issue	Care issue type	Earliest review by	Modified date		Inhaler technique	Standard	03-Feb-2016	04-Feb-2016	<a href="#">View</a>										
Care issue	Care issue type	Earliest review by	Modified date																					
Inhaler technique	Standard	03-Feb-2016	04-Feb-2016	<a href="#">View</a>																				
> Mr Gum Peartree	21-Mar-1981	2103814533	EH12 8RR	<a href="#">View</a>																				
> Mrs Debbie Dragoon	12-Nov-1979	1211795446	EH19 5YY	<a href="#">View</a>																				

Figure 10-4

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.

>	Mrs Alison Sunder	19-Jun-1998	1906983666	EH9 2YR	<a href="#">View</a>
---	-------------------	-------------	------------	---------	----------------------

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

### 10.3 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 10-5)
- Click the “generate report button” (Figure 10-5)

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Apr 10, 2012 15:03

Pharmacy Care Record 

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#### Patient report for Pharmacy One

<b>Criteria</b>	
PCR creation date, from	<input type="text"/> to <input type="text"/>
	<small>e.g. 01-05-2010 for the 1st of May 2010</small>
PCP Priority	<input type="text" value="All"/>
Care Issues Recorded	<input type="text" value="All"/>
Initial Assessment Completed	<input type="text" value="All"/>
<input type="button" value="Generate Report"/>	

Figure 10-5: 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 10-6)

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Jan 29, 2016 15:44

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### Patient report for Pharmacy

**Criteria**  
 PCR creation date, from  to   
e.g: 31-07-2015 for the 31st of July 2015  
 PCP Priority   
 Care Issues Recorded   
 Initial Assessment Completed

Generate Report

Report							Number of patients on report: 5
Family name	Given name	CHI	Created on	PCP Priority	Modified on	Number of care issues	Latest care risk assessment
Bond	Eric	3101798558	05-Dec-2013	Low Priority	11-Dec-2015	9	<a href="#">View</a>
Jamal	Jil	<b>CMS</b> 1107880122	08-Jan-2016	Medium Priority	15-Dec-2015	0	<a href="#">View</a>
Jamal	Jon	<b>CMS</b> 1002950112	08-Jan-2016	Low Priority	14-Dec-2015	0	<a href="#">View</a>
Tringle	Rupert	1807892670	30-Nov-2015	Currently Not Required	30-Nov-2015	0	<a href="#">View</a>
Twentythree	Twentythree	2302021231	11-Jul-2014	Low Priority	20-Jan-2010	0	<a href="#">View</a>

Figure 10-6: Patient Report Showing Patients with Initial Assessment Completed Flag set

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 (as defined by the pharmacist)
- Modified on
- Number of care issues
- latest care risk assessment (date) – note this is not the date the Initial Assessment Completed flag was set but refers to the completion of a Pharmaceutical Care Risk Assessment (as defined in section 5.3 of this user guide) for the patient

Selecting the “View” link will navigate to the corresponding patient home. (Figure 10-7)

Jamal	Jon	<b>CMS</b>	1002950112	08-Jan-2016	Low Priority	14-Dec-2015	0	<a href="#">View</a>
-------	-----	------------	------------	-------------	--------------	-------------	---	----------------------

Figure 10-7: “View” link

## 10.4 Core Service Registrations

### 10.4.1 Overview

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

#### CMS

- CMS registered patients with a record in PCR
- CMS registered patients with NO record in PCR
- CMS registered patients with initial assessment complete set
- CMS registered patients with initial assessment complete NOT set

#### MAS

- MAS registered patients with a record in PCR
- MAS registered patients with NO record in PCR
- MAS lapsed patients with a record in PCR
- MAS lapsed patients with NO record in PCR
- MAS registered and MAS lapsed patients with a record in PCR

To access a core service registration report, select the link from the report summary page, Figure 10-8.

#### Core service registrations reports

<b>CMS</b>	
<a href="#">CMS registered patients with a record in PCR</a>	[5]
<a href="#">CMS registered patients with NO record in PCR</a>	[4]
<a href="#">CMS registered patients with initial assessment complete set</a>	[2]
<a href="#">CMS registered patients with initial assessment complete NOT set</a>	[3]
<b>MAS</b>	
<a href="#">MAS registered patients with a record in PCR</a>	[3]
<a href="#">MAS registered patients with NO record in PCR</a>	[2]
<a href="#">MAS lapsed patients with a record in PCR</a>	[3]
<a href="#">MAS lapsed patients with NO record in PCR</a>	[2]
<a href="#">MAS registered and MAS lapsed patients with a record in PCR</a>	[6]

Note: links to report detail for reports containing MAS lapsed are not currently implemented. Only record counts are shown for these reports.

Figure 10-8: 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 MAS and/or CMS, and of those patients how many have a PCR record, some of the core service registration reports may return a large number of records. Where the number of records are large (in excess of 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.

- CMS registered patients with a record in PCR
- CMS registered patients with NO record in PCR
  - [Should not have a high number of records returned as most CMS registered patients should have a PCR record]*
- CMS registered patients with initial assessment complete set
- CMS registered patients with initial assessment complete NOT set
  - [Should not have a high number of records returned as most CMS registered patients should have had an initial assessment]*
- MAS registered patients with a record in PCR
- MAS registered patients with NO record in PCR

## 10.4.2 CMS registered patients with a record in PCR

### Report Example

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Fri, Jan 15, 2016 20:52



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CMS registered patients with a record in PCR					Number of records on report: 5
					<a href="#">Show/Hide Filter</a>
Patient name	Date of birth	CHI	Registration status effective from	PRS extract received	
Mr Liam Double	04-May-1990	0405900112	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Ann Hepple	18-Nov-1930	1811301223	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Mr George Hepple	08-Aug-1931	0808310119	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Jon Jamal	10-Feb-1995	1002950112	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Jil Jamal	11-Jul-1998	1107880122	05-May-2015	13-Jan-2016	<a href="#">Review</a>

[return to Reports Page](#)

### Report Columns

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

### 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 CMS registered patients that have been matched against an existing PCR record. If you have patient(s) registered for CMS but no PCR record for the patient they will not be included in this report (However, see 10.4.3 for CMS registered patients with NO record in PCR).

The PRS extract received column shows the most recent date of the a successful update from the Patient Registration Service. Any changes to a patient's registration status (for example registering a patient for CMS) made since this date will not show up until the next successful update from the Patient Registration Service.

### 10.4.3 CMS registered patients with NO record in PCR

#### Report Example

Last login: Fri, Jan 15, 2016 21:00


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#### CMS Registered with NO record in PCR

Number of records on report: 4

[Show/Hide Filter](#)

Patient name	Date of birth	CHI	Gender	Post code	Registration status effective from	PRS extract received	
Ms Yvonne Fish	06-Sep-1973	0609731246	Female	FF1 1FF	05-May-2015	13-Jan-2016	<a href="#">Create patient</a>
Jenny Golden	07-Jun-2007	0706070127	Female	GG2 2GG	05-May-2015	13-Jan-2016	<a href="#">Create patient</a>
Mr Lambert Ingold	09-Oct-1950	0910500118	Male	KK1 1KK	05-May-2015	13-Jan-2016	<a href="#">Create patient</a>
Miss Sarah Ingold	10-Nov-1995	1011950146	Female	KK2 2KK	05-May-2015	13-Jan-2016	<a href="#">Create patient</a>

[return to Reports Page](#)

#### Report Columns

- Patient Name
- Date of birth
- CHI
- Gender
- Post code
- Registration status effective from
- PRS extract received
- Create Patient (Select to launch create patient process)

#### 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 CMS registered patients that have NOT been matched against an existing PCR record. If you have patient(s) registered for CMS 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 CMS registered patients who do have an existing record on PCR).

The PRS extract received column shows the most recent date of the a successful update from the Patient Registration Service. Any changes to a patient's registration status (for example registering a patient for CMS) made since this date will not show up until the next successful update from the Patient Registration Service.

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.



#### 10.4.4 CMS registered patients with initial assessment complete set

##### Report Example

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CMS registered patients with initial assessment complete set					Number of records on report: 3
					<a href="#">Show/Hide Filter</a>
Patient name	Date of birth	CHI	Registration status effective from	PRS extract received	
Mr Liam Double	04-May-1990	0405900112	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Jon Jamal	10-Feb-1995	1002950112	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Jil Jamal	11-Jul-1988	1107880122	05-May-2015	13-Jan-2016	<a href="#">Review</a>

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##### Report Columns

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

##### Additional Information

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

### 10.4.5 CMS registered patients with initial assessment complete NOT set

#### Report Example

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CMS registered patients with initial assessment complete NOT set						Number of records on report: 2
						<a href="#">Show/Hide Filter</a>
Patient name	Date of birth	CHI	Days since registration	Registration status effective from	PRS extract received	
Ann Hepple	18-Nov-1930	1811301223	256	05-May-2015	13-Jan-2016	<a href="#">Review</a>
Mr George Hepple	08-Aug-1931	0808310119	256	05-May-2015	13-Jan-2016	<a href="#">Review</a>

[return to Reports Page](#)

#### Report columns

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

#### Additional Information

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

### 10.4.6 MAS registered patients with a record in PCR

#### Report example

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MAS registered patients with a record in PCR					Number of records on report: 2
					<a href="#">Show/Hide Filter</a>
Patient name	Date of birth	CHI	Registration status effective from	PRS extract received	
Robert Gold	07-Nov-1969	0711691231	05-May-2015	14-Jan-2016	<a href="#">Review</a>
Mr Thomas Gold	07-May-1999	0705990117	05-May-2015	14-Jan-2016	<a href="#">Review</a>

[return to Reports Page](#)

#### Report Columns

- Patient name
- Date of birth
- CHI
- Registration status effective from
- PRS extract received
- Review (Select to link to patient home)

#### 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 CMS registered patients that have been matched against an existing PCR record. If you have patient(s) registered for MAS but no PCR record for the patient they will not be included in this report (However see 10.4.7 for MAS registered patients with NO record in PCR).

The PRS extract received column shows the most recent date of the a successful update from the Patient Registration Service. Any changes to a patient’s registration status (for example registering a patient for MAS) made since this date will not show up until the next successful update from the Patient Registration Service.

### 10.4.7 MAS registered patients with NO record in PCR

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Feb 19, 2016 11:34

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

#### MAS registered patients with NO record in PCR

Number of records on report: 2

[Show/Hide Filter](#)

Patient name	Date of birth	CHI	Gender	Post code	Registration status effective from	PRS extract received	
Jenny Golden	07-Jun-2007	0706070127	Female	GG2 2GG	04-May-2015	11-Feb-2016	<a href="#">Create patient</a>
Mr Lambert Ingold	09-Oct-1950	0910500118	Male	KK1 1KK	07-May-2015	11-Feb-2016	<a href="#">Create patient</a>

[return to Reports Page](#)

#### Report Columns

- Patient Name
- Date of birth
- CHI
- Gender
- Post code
- Registration status effective from
- PRS extract received
- Create patient (Select to link to launch create patient process)

#### Additional Information

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

When Create patient link is selected the details will be prepopulated into the “Patient Details” page, shown below.

#### Patient Details

#### Patient Demographics

CHI  \*

Given name  \*

Preferred name

Date of birth  \*  
e.g. 31-07-2015 for the 31st of July 2015

Title

Family name  \*

Gender

Patient Deceased ☐

#### Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode

#### Contact Details

Home phone number

Mobile phone number

Work phone number

Email address



This report will only report on (count) the number of MAS registered patients that have NOT been matched against an existing PCR record. If you have patient(s) registered for MAS 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 10.4.6 for MAS registered patients who do have an existing record on PCR).

The PRS extract received column shows the most recent date of the a successful update from the Patient Registration Service. Any changes to a patient’s registration status (for example registering a patient for MAS) made since this date will not show up until the next successful update from the Patient Registration Service.

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.

## 10.5 Open Care Issue reports

### 10.5.1 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 10-9

The filter is applied automatically as you type.

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Wed, Apr 8, 2015 15:32

Pharmacy Care Record 

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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	
<input type="text"/>	<input type="text" value="1989"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Clear

Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	01-Jan-2010	22-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 5	Standard	03-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 4	Standard	20-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 7	Standard	01-May-2010	26-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 6	Standard	02-Apr-2015	01-Apr-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-9: Report Filter Example

## 10.5.2 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 10-10

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28

Pharmacy Care Record 

[Home](#) [Search](#) [Protocols](#) [Reports](#) [Change password](#) [Manage profile](#) [Yellow card](#) [Help](#) [Logout](#)

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	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	01-Jan-2010	22-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 4	Standard	01-Jan-2010	30-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 1	Standard	10-Mar-2010	30-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 5	Standard	03-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 4	Standard	20-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 7	Standard	01-May-2010	26-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 2	Standard	10-Jun-2010	30-Mar-2010	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	12-Mar-2015	12-Mar-2015	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 6	Standard	02-Apr-2015	01-Apr-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	smoking cessation care issue	Smoking cessation	07-Apr-2015	31-Mar-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Patient may not be adhering to their gluten free diet	Gluten-free	28-Apr-2015	31-Mar-2015	<a href="#">View</a>

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Figure 10-10: 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.

### 10.5.3 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 10-11.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 10, 2015 11:12

Pharmacy Care Record 

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Open care issues with reviews due in the next 7 days							Number of records on report: 4
							Show/Hide Filter
Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	18-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	21-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Patient unaware that they should inform the team responsible for their anticoagulant care of any newly prescribed medicines	Standard	21-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	22-Apr-2015	16-Apr-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-11: 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.



### 10.5.4 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 10-12.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 10, 2015 11:12



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Open care issues with reviews due in the next 14 days							Number of records on report: 5
							Show/Hide Filter
Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	18-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	21-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Patient unaware that they should inform the team responsible for their anticoagulant care of any newly prescribed medicines	Standard	21-Apr-2015	16-Apr-2015	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	22-Apr-2015	16-Apr-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Patient may not be adhering to their gluten free diet	Gluten-free	28-Apr-2015	31-Mar-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-12: 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.

### 10.5.5 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 10-13.

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Tue, Apr 7, 2015 15:28

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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	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 8	Standard	01-Jan-2010	22-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 4	Standard	01-Jan-2010	30-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 1	Standard	10-Mar-2010	30-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 5	Standard	03-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 4	Standard	20-Apr-2010	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 7	Standard	01-May-2010	26-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 2	Standard	10-Jun-2010	30-Mar-2010	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 2	Standard	01-Jul-2010	30-Mar-2010	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 1	Standard	01-Aug-2010	30-Mar-2010	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Standard Care Issue	Standard	12-Mar-2015	12-Mar-2015	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 6	Standard	02-Apr-2015	01-Apr-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	smoking cessation care issue	Smoking cessation	07-Apr-2015	31-Mar-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-13: 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.

### 10.5.6 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 10-14.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28

Pharmacy Care Record 

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Open care issues with no outcome ever recorded						Number of records on report: 3
						Show/Hide Filter
Patient name	Date of birth	CHI	Description	Type	Modified	
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 1	Standard	17-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 3	Standard	30-Mar-2010	<a href="#">View</a>
Mrs Louise Brennan	21-Aug-1998	2108989749	Care Issue with no Outcome	Standard	01-Apr-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-14: 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.

### 10.5.7 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

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28

Pharmacy Care Record 

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Open care issues with no review date set						Number of records on report: 8
						Show/Hide Filter
Patient name	Date of birth	CHI	Description	Type	Modified	
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 2	Standard	29-Mar-2010	<a href="#">View</a>
Mr Simon Ames	30-Jan-1989	3001893397	Ames Care Issue 3	Standard	29-Mar-2010	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	3108808036	Cloud Care Issue 5	Standard	30-Mar-2010	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Methotrexate Care issue	High risk medicines	06-Mar-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Warfarin Care Issue	High risk medicines	06-Mar-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	Patient unaware that they should inform the team responsible for their anticoagulant care of any newly prescribed medicines	High risk medicines	06-Mar-2015	<a href="#">View</a>
Jane Brown	07-Jun-1987	7777777777	New medicine care issue	New medicine	06-Mar-2015	<a href="#">View</a>
Mr Elliott Barnes	09-Jul-1987	0907878512	Care Issue with no review date set	Standard	31-Mar-2015	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-15: 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.

## 10.6 New Medicine intervention reports

### 10.6.1 Overview

The following reports are available to support the new medicine interventions feature:

- 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.

## 10.6.2 Reports

To run any new medicine intervention support tool report:

- Select the report link (Figure 10-16)

Pharmacy: 9895 - Ork5  
 User: Ork5 - Kim Smith  
 Last login: Mon, Feb 25, 2013 09:49

Pharmacy Care Record 

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### Reports

#### Care issue and patient report

[Outstanding care issues](#)  
[Patient report for associated pharmacy](#)

#### New medicine intervention support tool reports

[All new medicine interventions for the pharmacy](#) [01]  
[All open new medicine interventions](#) [01]  
[Follow ups scheduled up to TODAY](#) [01]  
[Follow ups scheduled up to 7 days from today](#) [01]  
[Follow ups scheduled up to 14 days from today](#) [01]  
[Follow ups scheduled up to 28 days from today](#) [01]  
[Open new medicine interventions without any follow ups](#) [01]  
[Completed new medicine interventions](#) [01]

Figure 10-16: New medicine intervention support tool report links

- The report is displayed (Figure 10-17 and Figure 10-18 as examples)  
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New medicine intervention support tool report							
Follow ups scheduled up to 7 days from today							
Number of records on report: 6							
Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
19-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	
20-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
20-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
22-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>

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Figure 10-18 as examples)

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New medicine intervention support tool report							
Follow ups scheduled up to 7 days from today							
Number of records on report: 6							
Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
19-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	
20-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
20-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
22-Jan-2016	Ms Fiona TestPatient	<b>MAS LAPSED</b> 2107720126	A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>

[return to Reports Page](#)

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New medicine intervention support tool report							
Follow ups scheduled up to 7 days from today							
Number of records on report: 6							
Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
19-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In p	
20-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
20-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
22-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>

[return to Reports Page](#)

Figure 10-17: All new medicine interventions report

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New medicine intervention support tool report							
Follow ups scheduled up to 7 days from today							
Number of records on report: 6							
Scheduled date (hover for timeslot)	Patient name	CHI	Medicine detail	Last modified on	Last modified by	Contact preference	
19-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In p	
20-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
20-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>
21-Jan-2016	Fern Williams	7777777777	A new Medicine	13-Jan-2016	testuser	In person	<a href="#">Review</a>
22-Jan-2016	Ms Fiona TestPatient	MAS LAPSED	2107720126 A Test	14-Jan-2016	testuser	In person	<a href="#">Review</a>

[return to Reports Page](#)

Figure 10-18: Follow ups scheduled up to 7 days from today

## Report Data

Report Name	Report Columns
<i>All new medicine interventions for the pharmacy</i>	<ul style="list-style-type: none"> <li>Patient Name</li> <li>Core service indicator icon</li> <li>CHI</li> <li>Medicine detail</li> <li>Last modified on</li> <li>Last modified by</li> <li>Status</li> <li>Review page link</li> </ul>
<i>All open new medicine interventions report</i>	
<i>Open new medicine interventions without any follow ups</i>	
<i>Completed new medicine interventions</i>	
<i>Follow ups scheduled up to TODAY</i>	<ul style="list-style-type: none"> <li>Scheduled date (hover for timeslot)</li> <li>Patient name</li> <li>Core service indicator icon</li> <li>CHI</li> <li>Medicine detail</li> <li>Last modified on</li> <li>Last modified by</li> <li>Contact preference (By Telephone or In Person)</li> <li>Review page link</li> </ul>
<i>Follow ups scheduled up to 7 days from today</i>	
<i>Follow ups scheduled up to 14 days from today</i>	
<i>Follow ups scheduled up to 28 days from today</i>	

**Note:** All new medicine intervention reports display a count of the number of records returned.



## 10.7 Complex dispensing patient reports

There are three complex dispensing patient reports, that can be accessed from links on the Reports Page.

There is one report for each flag status:

- Complex dispensing patient set to Yes
- Complex dispensing patient set to No
- Complex dispensing patient set to Not Recorded

**To view a complex dispensing patient report:**

- Select link from the reports page, Figure 10-2 (Separate links for Yes, No, or Not recorded)
- The report detail will be displayed, Figure 10-19.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Oct 22, 2013 15:56

Pharmacy Care Record 

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Complex dispensing patient set to Yes								Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Monitored dosage system required by pharmacist	Monitored dosage system requested	Other adherence support required	Special monitoring and feedback required	Instalment dispensing requested by prescriber
Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	Yes	-	Yes	-	- <a href="#">View</a>

[return to Reports Page](#)

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Complex dispensing patient set to Not Recorded				Number of records on report: 60
Patient name	Date of birth	CHI	Post code	
Mr Simon Ames	30-Jan-1989	3001893397	AA1 1AA	<a href="#">View</a>
Mr Elliott Barnes	09-Jul-1987	0907878512	HS2 0XP	<a href="#">View</a>
Mr Eric Bond	31-Jan-1979	3101798558	BB2 2BB	<a href="#">View</a>
Mrs Louise Brennan	21-Aug-1998	2108989749	DN24 2GT	<a href="#">View</a>
Mrs Anne Brown	07-Jul-1967	0707679680	AB12 8ET	<a href="#">View</a>
Mr Terence Butcher	03-Jun-1987	0306873834		<a href="#">View</a>
Mrs Jayne Carter	12-Feb-1982	9999999999	EH25 3TD	<a href="#">View</a>
Miss Mary Cloud	31-Aug-1980	310808036	NG7 5QX	<a href="#">View</a>
Mr Barry Constantine	08-Aug-1968	0808682156	AB12 3EW	<a href="#">View</a>
Mrs Linda Cunningham	09-Sep-1969	0909693560	AB42 4TS	<a href="#">View</a>
Fiona DeleteTest	05-May-1995	5555555555	AA1 1AA	<a href="#">View</a>
Mr Liam Double	04-May-1990	405900112	DD1 1DD	<a href="#">View</a>
Mr Liam Double	04-May-1990	0405900112	DD1 1DD	<a href="#">View</a>
Mrs Rachel Edge	05-Jul-1985	0507851226	EE1 1EE	<a href="#">View</a>
Mrs Rachel Edge	05-Jul-1985	507851226	EE1 1EE	<a href="#">View</a>
Eight Eight	03-Jun-1995	0808081233	AA1 1AA	<a href="#">View</a>
Eleven Eleven	03-Jun-1998	1111111243	AA1 1AA	<a href="#">View</a>
Fifteen Fifteen	03-Jun-2002	1501051266	AA1 1AA	<a href="#">View</a>
Mrs Jo Franklin	09-Mar-1976	0903769301		<a href="#">View</a>
Mrs Jo Franklindonotdelete	20-Oct-1976	2010761243		<a href="#">View</a>
Mr Harry Giles	07-May-1992	0705924955	TD11 4HY	<a href="#">View</a>
Robert Gold	07-Nov-1969	0711691231	GG1 1GG	<a href="#">View</a>

Figure 10-19: Example complex dispensing reports

Each complex dispensing patient report displays:

- Patient name
- Core service indicator icon
- Date of birth
- CHI
- Postcode
- “View” link to navigate to the patient details
- Return to Reports Page link
- A count of the number of records in the report.

## 10.8 Gluten-free reports

Gluten-free reports are accessed from a link on the Reports Page, Figure 10-2.

The following reports are available:

- Diagnosed coeliac patients (historical)
- Gluten-free diet set to Yes
- Gluten-free diet set to No
- Gluten-free diet set to Not Recorded
- All gluten-free assessments
- All open gluten-free assessments
- All completed gluten-free assessments
- Annual health check scheduled up to 8 weeks from today
- Annual health check not completed in pharmacy

### To view a Gluten-free report:

- Select link from the Reports page
- The report detail will be displayed, Figure 10-20

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Mon, Oct 14, 2013 08:56

Pharmacy Care Record 

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Gluten-free diet set to Not Recorded					Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Gluten-free diet	
Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	Not Recorded	<a href="#">View</a>

[return to Reports Page](#)

Figure 10-20: Gluten-free diet “Not Recorded” as example.

Report	Report Data
Diagnosed coeliac patients (historical)	Patient Name Core service indicator icon  Date of birth CHI Post Code “View” link
Gluten-free diet set to Yes Gluten-free diet set to No Gluten-free diet set to Not Recorded	Patient Name Core service indicator icon  Date of birth CHI Post Code Gluten-free diet “View” link

All gluten-free assessments All open gluten-free assessments All completed gluten-free assessments	Patient Name Core service indicator icon  CHI Last modified on Last modified by Status “Review” link
Annual health check scheduled up to 8 weeks from today	Patient Name Core service indicator icon  CHI Date of annual health check Last modified on Last modified by Status “Review” link
Annual health check not completed in pharmacy	Patient Name Core service indicator icon  CHI Last modified on Last modified by Status “Review” link

A count of the number of records in the report is also displayed.

## 10.9 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 10-2.

- 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 10-2.
- The report detail will be displayed, Figure 10-21 (Example shown “All”)

Pharmacy: 9895 - Ork5  
 User: ork5 - Kim Smith  
 Last login: Mon, Feb 25, 2013 11:49

Pharmacy Care Record **NHS**  
 SCOTLAND

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### High Risk Medicine Assessments

Criteria

Type

All

Status

All

Generate Report

Number of records on report: 1

Patient Name	CHI	Type	Last modified on	Last modified by	Status	
Johnathan Smith	1111111111	Methotrexate	25-Feb-2013	ork5	Open	<a href="#">View</a>

[return to Reports Page](#)

**Figure 10-21: 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.

## 10.10 Smoking Cessation support tool assessment reports

### 10.10.1 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. The will toggle the display of the filter.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Jun 5, 2014 11:20

Pharmacy Care Record **NHS**  
 SCOTLAND

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#### Assessments with no interactions in the last seven days

Number of records on report: 6

Show/Hide Filter

Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
<input type="text"/>	<input type="text" value="Apr"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Clear](#)

Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Nine Nine	25-Apr-2014	03-Jun-1996	0909091234	BB11 1BB	Week 1	Week 7	Four week released <a href="#">View</a>
Ten Ten	25-Apr-2014	03-Jun-1997	1010101234	AA11 2BB	Week 1	Week 7	Four week released <a href="#">View</a>
Three Three	25-Apr-2014	03-Jun-1990	0303031239	AA1 1AA	Week 1	Week 7	Four week released <a href="#">View</a>

[return to Reports Page](#)

Show  
or  
Hide  
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.

## 10.10.2 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 MDS Status.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Wed, Jun 11, 2014 14:02



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All Open smoking cessation assessments for the pharmacy							Today: Wednesday, 11th June, 2014
							Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Mr Steven Williams		15-Feb-1945	1111111111	G12 3NR			Open <a href="#">View</a>

[return to Reports Page](#)

Figure 10-22: All open

### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS (Status)

### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.



### 10.10.3 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 MDS Status.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Wed, Jun 11, 2014 14:15

Pharmacy Care Record 

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All Completed smoking cessation assessments for the pharmacy							Today: Wednesday, 11th June, 2014
							Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Frembokin Holutgon	04-May-2014	27-Jul-1973	8888888888	EH54 7EZ		Week 7	Four week released <a href="#">View</a>
Mr Steven Williams	11-Jun-2014	15-Feb-1945	1111111111	G12 3NR		Week 1	Started <a href="#">View</a>

[return to Reports Page](#)

Figure 10-23: All Completed smoking cessation assessments

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS

#### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

#### 10.10.4 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.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Thu, Jun 5, 2014 11:20



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**Assessments with no interactions in the last seven days**
Number of records on report: 6  
Show/Hide Filter

Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
<input type="text"/>	<input type="text" value="25"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> Clear

Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Nine Nine	25-Apr-2014	03-Jun-1996	0909091234	BB11 1BB	Week 1	Week 7	Four week released <a href="#">View</a>
Ten Ten	25-Apr-2014	03-Jun-1997	1010101234	AA11 2BB	Week 1	Week 7	Four week released <a href="#">View</a>
Three Three	25-Apr-2014	03-Jun-1990	0303031239	AA1 1AA	Week 1	Week 7	Four week released <a href="#">View</a>

[return to Reports Page](#)

Figure 10-24

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS (Status)

#### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

### 10.10.5 Assessments awaiting four or twelve week follow up

This report assists with keeping track of smoking cessation assessments that are within their next MDS submission window. It will show all open smoking cessation assessment where:

- The next step is 4 week MDS submission and are in the 4-6 week submission window
- The next step is 12 week MDS submission and are in the 10-14 week submission window

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Wed, Jun 11, 2014 14:15



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Assessments awaiting four or twelve week follow up							
							Number of records on report: 1
							Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	MDS Stage	Last contact week	Quit attempt week
Mark Feeney	07-May-2014	04-Feb-1984	2222222222	G12 9XQ	Four week	Week 4	Week 6
							<a href="#">View</a>

[return to Reports Page](#)

**Figure 10-25: Smoking cessation assessments awaiting four or twelve week follow up**

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Post code
- MDS 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.

### 10.10.6 Assessments with no quit date set

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Jun 3, 2014 11:28



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Assessments with no quit date set				Number of records on report: 1
				Show/Hide Filter
Patient name	Date of birth	CHI	Post code	
One One	03-Jun-1987	0101011237	AA1 1AA	<a href="#">View</a>

[return to Reports Page](#)

**Figure 10-26: Assessments with no quit date set**

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Post code

#### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

### 10.10.7 Assessments with minimum data set submissions expiring in the next seven days

This report assists with managing assessment that are nearing their MDS submission deadline. It is intended to help ensure submissions are not missed.

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Tue, Jun 17, 2014 11:31

Pharmacy Care Record 

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Assessments with minimum data set submissions expiring in the next seven days								Number of records on report: 1
								Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Days to expiry	Last contact week	Quit attempt week	MDS
Robert Johnston	10-May-2014	01-Jan-1983	9999999999	G1 1AB	4	Week 1	Week 7	Started <a href="#">View</a>

[return to Reports Page](#)

Figure 10-27

## Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Post code
- Days to expiry
- Last contact week
- Quit attempt week
- MDS

### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

## 11 PMR interface to PCR

### 11.1 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 CMS. Links to PCR functions are therefore usually found on the Patient's CMS 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 11-1 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 11-1: link to PCR from the Cegedim RX Pharmacy Manager PMR

Figure 11-2 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.

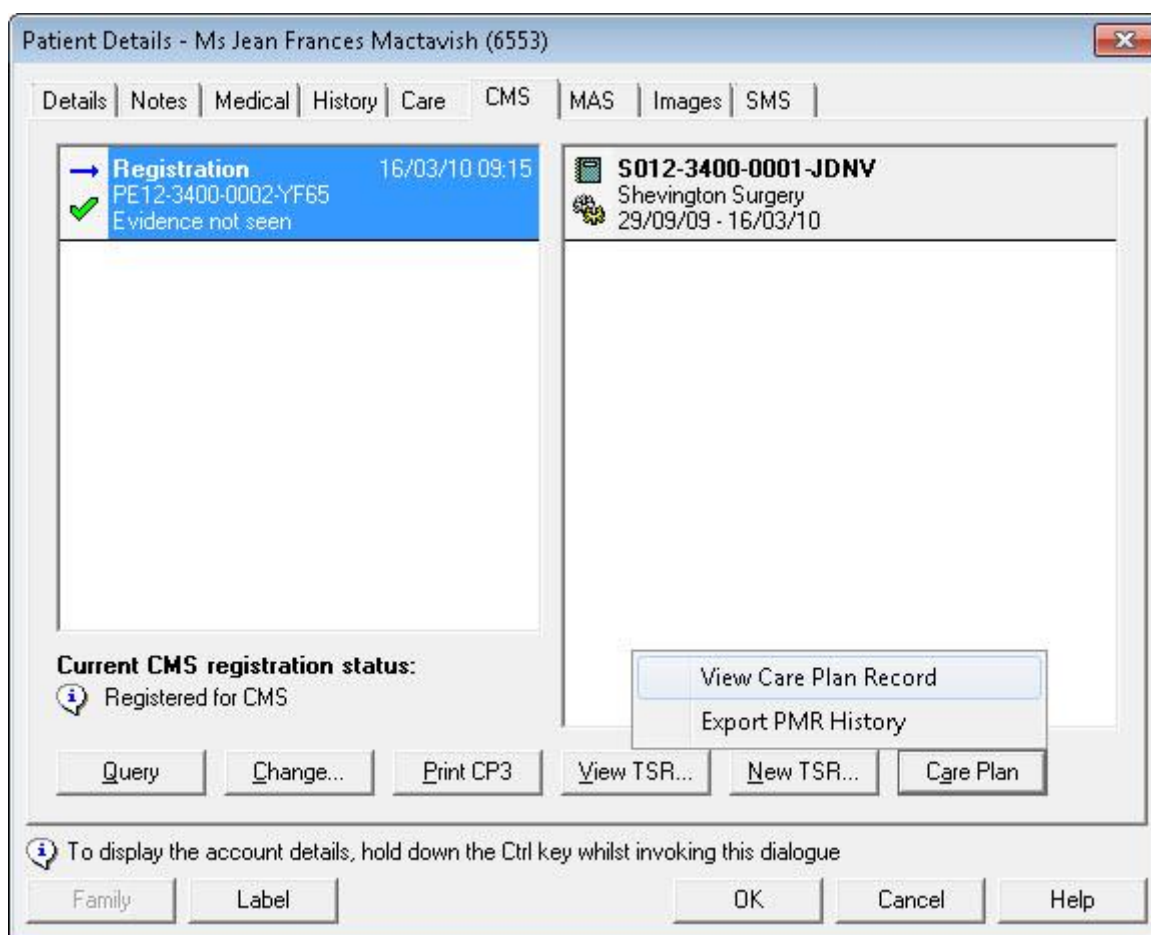


Figure 11-2: Positive Solution's Analyst PMR system

## 11.2 Patient interface

Having chosen a patient on your PMR who is registered for CMS (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 CMS.

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 11-3) then you will be asked if you wish to update the patient's demographics on PCR to match those held on your PMR page.

Contractor Code : 1234 - Pharmacy One  
Current User : 1234567 - Test User

Pharmacy Care Record 

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Patient Import Match

The data passed from your PMR Application differs from the Patient information within the PCR Application.  
Patient with CHI: 3333333333

PCR information for the Patient		PMR information for the Patient	
Family name	Patient	Family name	Patient
Given name	Demo	Given name	Demo
Title	Mr	Title	Mr
Date of birth	01-Jan-1960	Date of birth	01-Jan-1960
Address 1	3 Appleton Parkway	Address 1	2 Linwood Road
Address 2	Livingston	Address 2	Linwood
Address 3	West Lothian	Address 3	Paisley
Address 4		Address 4	
Address 5		Address 5	
Postcode	EH54 7EZ	Postcode	PA3 3BB
Home telephone number	0123456789	Telephone number	0987654321
Gender	Male	Gender	Male

Do you want to update PCR with the information from the PMR?

Figure 11-3: 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.

### 11.3 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, CMS 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 CMS), 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 file already exists for a patient the file 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 file that you previously created on your PMR.

### 11.3.1 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 11-4)

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Mon, Mar 16, 2015 08:06

Pharmacy Care Record 

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---

**AMES, Simon (Mr)** Born 30-Jan-1989 (26y) Gender Male CHI No. 3001893397  
Patient Details Last Modified On 30-Mar-2010 By testuser

Address Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad... [Phone and email](#)

---

**Medications**


Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
> TestOne		AMS	None	23-Nov-2012	PCRDVR02User	False	<a href="#">View</a>

[Add Medication](#)  
[Import Medication](#)

[return to Patient Home Page](#)

Figure 11-4: Medications page

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Mon, Mar 16, 2015 08:06

Pharmacy Care Record 

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---

**AMES, Simon (Mr)** Born 30-Jan-1989 (26y) Gender Male CHI No. 3001893397  
Patient Details Last Modified On 30-Mar-2010 By testuser

Address Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad... [Phone and email](#)

---

**Import Medications**

Choose file

[return to Patient Medications page](#)  
[return to Patient Home Page](#)

Figure 11-5: 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 11-5, 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 file 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.

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Mon, Mar 16, 2015 08:06

Pharmacy Care Record **NHS**  
SCOTLAND

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**AMES, Simon (Mr)**
Born 30-Jan-1989 (26y) Gender Male CHI No. 3001893397  
Patient Details Last Modified On 30-Mar-2010 By testuser

Address **Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad...** Phone and email

**Import Medications**

Choose file
Browse...
Upload

[return to Patient Medications page](#)  
[return to Patient Home Page](#)

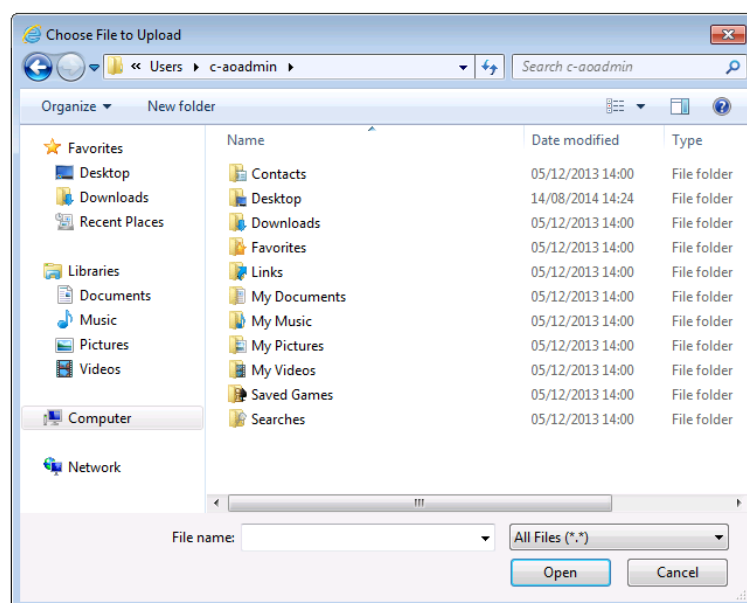



Figure 11-6: PCR medication import page and standard windows file open dialog

If the box is 'greyed out' preventing you from entering information, click the 'Browse' button shown in Figure 11-6. 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 11-6 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 11-7 will be displayed.

Pharmacy: 1234 - Pharmacy 1234	Pharmacy Care Record 
User: Testuser - Jane Smith	
Last login: Mon, Mar 16, 2015 08:06	

---

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<b>AMES, Simon (Mr)</b>	Born 30-Jan-1989 (26y) Gender Male CHI No. 3001893397
Patient Details Last Modified On 30-Mar-2010 By testuser	
Address Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad... Phone and email	

**Import Medications**

Are you sure you wish to import the medication data of patient AMES, Simon (Mr)?	<input type="button" value="Yes"/>	<input type="button" value="No"/>
--	------------------------------------	-----------------------------------

[return to Patient Medications page](#)  
[return to Patient Home Page](#)

Figure 11-7: 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 11-8 shows several expanded medication lines which are displayed by clicking '>' and show the dispensing history over the period of time.

Contractor Code : 1234 - Pharmacy One  
Current User : 1234567 - Test User

Pharmacy Care Record **NHS**  
SCOTLAND

Search Protocols Reports Change password Help Logout

**PATIENT, Demo (Mr)** Born 01-Jan-1960 (50y) Gender Male CHI No. 777777777  
Patient Details Last Modified On 13-Apr-2010 By 1234567

Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ Phone and email 0123456789

**Medications**

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	
> St Johns Wort	12-Apr-2010	OTC	Depression	13-Apr-2010	1234567	False	<a href="#">View</a>
> Chloramphenicol 0.5% eye drops (Co-Pharma)	26-Feb-2010	MAS		13-Apr-2010	1234567	True	<a href="#">View</a>
> Aspirin 75mg Tablets	01-Jan-2010	CPUS		13-Apr-2010	1234567	False	<a href="#">View</a>
> E45 Crm	24-Jun-2009	CMS		13-Apr-2010	1234567	True	<a href="#">View</a>
> Atorvastatin Tabs 40MG	24-Jun-2009	CMS		13-Apr-2010	1234567	True	<a href="#">View</a>
Quantity	Direction	Dispensed on	Imported				
28	Take One Daily	24-Jun-2009	True				
28	Take One Daily	26-May-2009	True				
28	Take One Daily	25-Apr-2009	True				
28	Take One Daily	26-Feb-2009	True				
> Diprobase cream (Schering-Plough Ltd) 50 gram	26-May-2009	other		13-Apr-2010	1234567	True	<a href="#">View</a>
> Xalatan 50micrograms/ml eye drops (Pfizer Ltd) 2.5 ml	26-May-2009	other		13-Apr-2010	1234567	True	<a href="#">View</a>
> Paracetamol 500mg coaplets (Teva UK Ltd) 32 tablet 4 x 8 tablets	26-May-2009	other		13-Apr-2010	1234567	True	<a href="#">View</a>
> Aspirin Tabs 75MG	26-May-2009	AMS		13-Apr-2010	1234567	True	<a href="#">View</a>
> Levothyroxine Tabs 50MICROGRAMS	26-May-2009	AMS		13-Apr-2010	1234567	True	<a href="#">View</a>
Quantity	Direction	Dispensed on	Imported				
112	Take One Three Times A Day	26-May-2009	True				
112	Take One Three Times A Day	29-Apr-2009	True				
> Clinutren Dessert vanilla (Nestle Clinical Nutrition) 500 gram 4 x 125g pots	29-Apr-2009	other		13-Apr-2010	1234567	True	<a href="#">View</a>
> Aspirin Tabs 75MG	29-Apr-2009	AMS		13-Apr-2010	1234567	True	<a href="#">View</a>
> Paracetamol 500mg coaplets (M&A) [DPS=32]	26-Feb-2009	MAS		13-Apr-2010	1234567	True	<a href="#">View</a>

[Add Medication](#)  
[Import Medication](#)

[return to Patient Home Page](#)

Figure 11-8: several expanded medication lines

### 11.3.2 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 11-9 shows the addition of an indication for an item that has been imported from a PMR.

Pharmacy: 1234 - Pharmacy 1234  
User: Testuser - Jane Smith  
Last login: Mon, Mar 16, 2015 08:06

Pharmacy Care Record **NHS**  
SCOTLAND

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

**AMES, Simon (Mr)** Born 30-Jan-1989 (26y) Gender Male CHI No. 3001893397  
Patient Details Last Modified On 30-Mar-2010 By testuser

Address Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad... Phone and email

**Medication** \* Means a field requires data

Name Aspirin 75mg dispersible tablets\*

Service CMS

Indication

Last dispensed on 17-Oct-2015

Imported Yes

[Save](#) [Cancel](#)

Figure 11-9: PCR patient medication entry/edit page – editing an imported item

### 11.3.3 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.

## 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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.net 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. 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.net for support.



**PCR Code 210**

Reset Password Error: Your new password must not be the same as your previous password. Please re-enter a new password.



## 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 PCR 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 11-10)
- Select “Create Shortcut” from the context menu

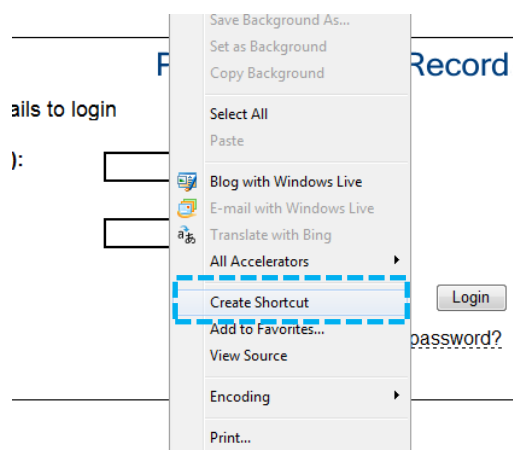


Figure 11-10:right click to "Create shortcut"

- A popup message will be displayed (Figure 11-11)

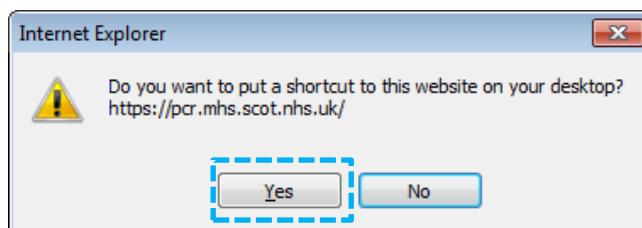


Figure 11-11: Confirm "Create shortcut"

- Select “Yes”
- A shortcut to PCR is placed on your Desktop (Figure 11-12)

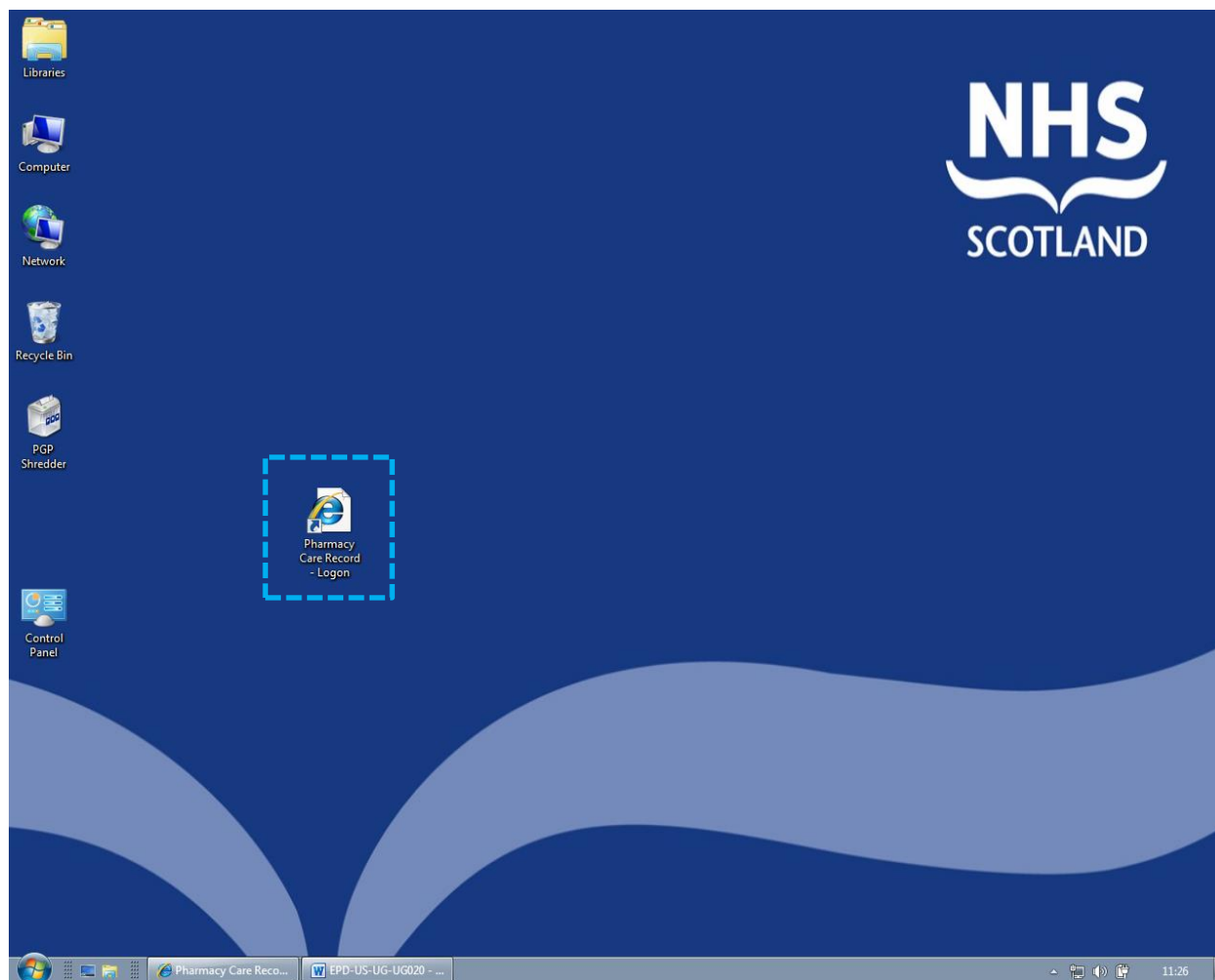


Figure 11-12: PCR Icon on Desktop

## Appendix C: PCR association - Common issues

### 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 the majority of 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 11-13).

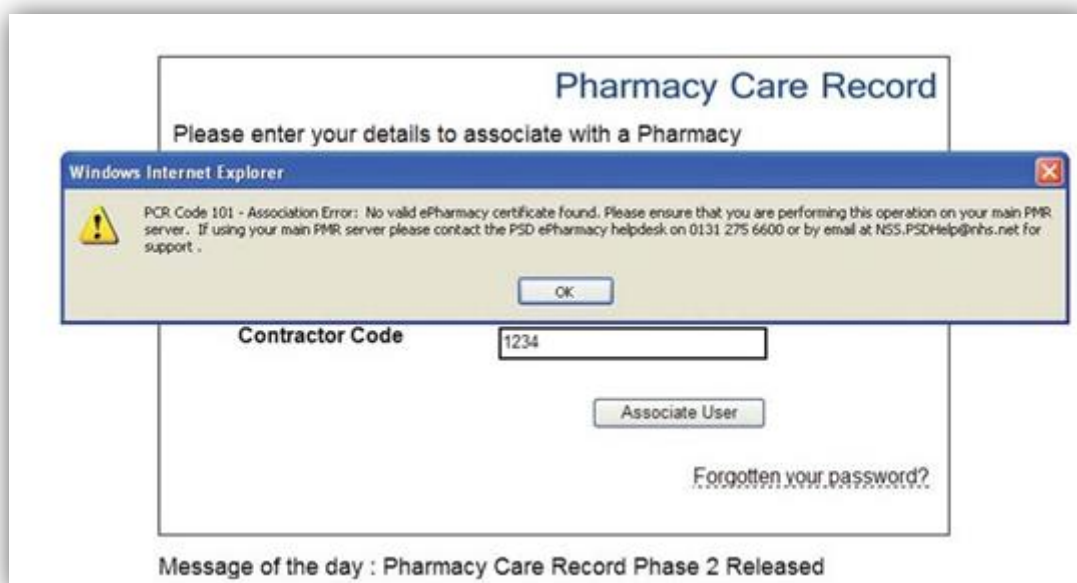


Figure 11-13: Error message if ePharmacy Certificate not present

## 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 11-13) then you may be able to resolve the issue by adding the PCR Association website to your list of trusted websites.



Figure 11-14: 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 11-15)

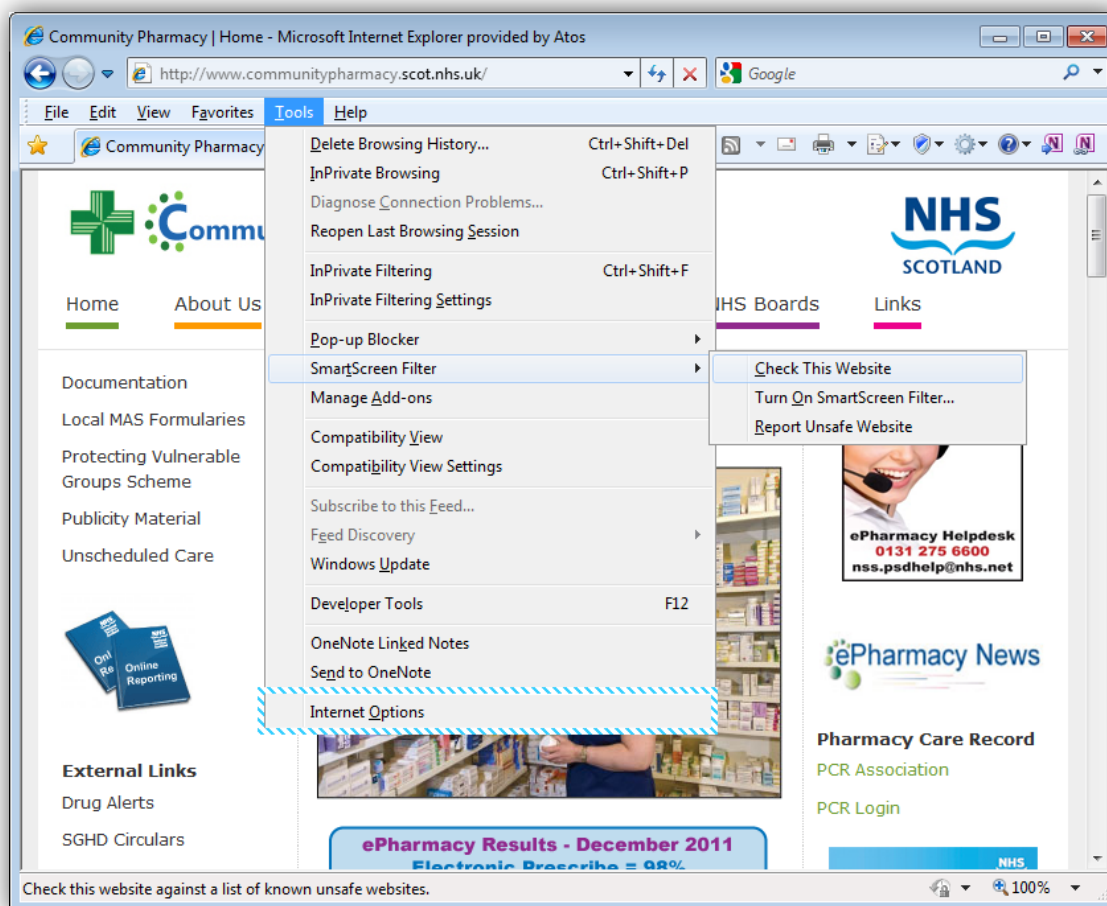


Figure 11-15: Tools &gt; Internet Options (IE8)

- Select the security tab and then select the “Trusted sites” zone (Figure 11-16).

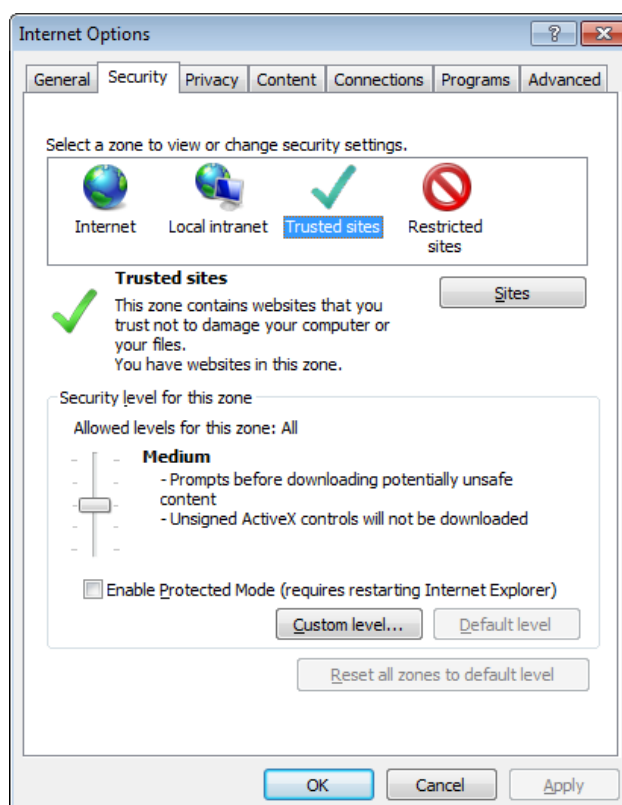


Figure 11-16: Trusted sites zone on security tab

- Click the “Sites” button, the “Trusted” sites dialogue is shown (Figure 11-17)



Figure 11-17: 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 11-17).
- 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 community pharmacy website [http://www.communitypharmacy.scot.nhs.uk/core\\_services/pcr.html](http://www.communitypharmacy.scot.nhs.uk/core_services/pcr.html) under PCR Association Error 109 Resolution.

### **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).

## Appendix D: Example test patients

### 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



## 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

## 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

## Appendix E: Patient Test Cases

### Test Patient 1: Ms Sally Shortbread

#### Patient Details

<b>Name:</b> Sally Shortbread <b>Gender:</b> Female	<b>Date of Birth:</b> <b>CHI Number:</b> 5555555555
<b>Contact Details:</b> N/A	<b>Address:</b> 123 Anywhere Street Anytown AN1 3RR  <b>Email address:</b>  <b>Phone Number:</b>

#### Medication Profile/Pharmaceutical Care Risk Assessment

Care Issues with the appropriateness of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the formulation of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the dosage and frequency of the medicine/s?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Takes ACE inhibitor and diuretic at tea-time Sub therapeutic dosage of paracetamol
Care Issue with the contraindications?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Drug Interaction with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	

Side effects with one or more medicines?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Night time diuresis as a result of timing of diuretic
Problems with concordance?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Doesn't always take her diuretic therapy due to concerns about diuresis.  Finds it difficult to press out paracetamol tablets from blister pack
Care Issue in relation to polypharmacy?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacokinetic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacodynamic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Disease risk factor?	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Recorded	
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Taking one or more black triangle medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Duplication of medication	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Summary: Are there any pharmaceutical care issues of note?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	

#### Patient Profile

General Health: Smoker
Medical conditions: Hypertension, Osteoarthritis
Allergies and Sensitivities: None known

## Patient Factors: Dispositions

Compromised oral route of administration	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Physical Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	<i>Note: suffers with sore hands</i>
Visual Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

## Patient Factors: Organ Function

Hepatic function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Renal function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Lung function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Immune status:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

## Patient Factors: Maternal

Pregnant:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Breastfeeding:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

## Pharmaceutical Care Plan Priority

<b>PCP Priority:</b> <input type="radio"/> Low Priority <input checked="" type="radio"/> Medium Priority <input type="radio"/> High Priority
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## Care Plan

Care Issue	Desired outcome	Action	Action by (Pharmacist, GP, Nurse, Patient)	Response
Inappropriate medication regimen leading to poor compliance with diuretic	Improve patient compliance	Advise the patient to take ACE inhibitor and diuretic in the morning and update labelling information	Pharmacist	Patient no longer having problems with nocturnal diuresis
Poor pain control	Improved pain control with current therapy	Advise the patient that she can take two paracetamol tablets every four to six hours when required for pain control	Pharmacist	Patient reporting improved pain control with new dosage
Difficulty with blister pack packaging	Provide paracetamol in a more appropriate packaging form	Supply paracetamol in non-blister pack packaging	Pharmacist	Patient reporting no further problems
Patient is a smoker	Encourage and support the patient to stop smoking	Discuss risks of smoking with patient	Pharmacist	Patient enrolled on PHS smoking cessation service

## Test Patient 2: Mr Bertie Biscuit

### Patient Details

<b>Name:</b> Bertie Biscuit <b>Gender:</b> Male	<b>Date of Birth:</b> <b>CHI Number:</b> 7777777777
<b>Contact Details:</b> N/A	<b>Address:</b> 124 Anywhere Street Anytown AN1 3RR  <b>Email address:</b>  <b>Phone Number:</b>

### Medication Profile/Pharmaceutical Care Risk Assessment

Care Issues with the appropriateness of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the formulation of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the contraindications?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Drug Interaction with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	

Side effects with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Problems with concordance?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue in relation to polypharmacy?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacokinetic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacodynamic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Disease risk factor?	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Recorded	
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Taking one or more black triangle medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Duplication of medication	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Summary: Are there any pharmaceutical care issues of note?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	<i>Has poor knowledge of rationale of medicines and this may lead to compliance problems</i>

#### Patient Profile

<b>General Health:</b> Overweight, smoker, poor vision due to cataracts
<b>Medical conditions:</b> Diabetes, Hypertension
<b>Allergies and Sensitivities:</b> None known



## Patient Factors: Dispositions

Compromised oral route of administration	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Physical Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Visual Impairment	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	Cataracts - awaiting cataract operation

## Patient Factors: Organ Function

Hepatic function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Renal function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Lung function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Immune status:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

## Patient Factors: Maternal

Pregnant:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Breastfeeding:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

## Pharmaceutical Care Plan Priority

PCP Priority:	<input type="radio"/> Low Priority <input checked="" type="radio"/> Medium Priority <input type="radio"/> High Priority	<i>Improve patient's understanding of their medicines to prevent any potential compliance problems</i>
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**Care Plan**

Care Issue	Desired outcome	Action	Action by (Pharmacist, GP, Nurse, Patient)	Response
Poor understanding of rationale of medicines for diabetes and hypertension	Improve patient's understanding of the rationale of their current therapy	Counsel patient accordingly	Pharmacist	Patient has better understanding of each therapy and its importance
Patient has poor vision – due to cataracts	Ensure that the patient can read any appropriate patient information e.g. medication labels	Discuss the patient's ability to read labels	Pharmacist	Provide large print labels if necessary
Patient is a smoker	Encourage and support the patient to stop smoking	Discuss risks of smoking with patient	Pharmacist	Patient is enrolled on the PHS smoking cessation service
Patient is overweight	Reduce patient's weight through lifestyle changes	Provide lifestyle advice e.g. weight loss, exercise, alcohol intake	Pharmacist	Patient starting a regular exercise regimen

## Test Patient 3: Mr Colin Cracker

### Patient Details

<b>Name:</b> Colin Cracker <b>Gender:</b> Male	<b>Date of Birth:</b> <b>CHI Number:</b> 9999999999
<b>Contact Details:</b> N/A	<b>Address:</b> 125 Anywhere Street Anytown AN1 3RR  <b>Email address:</b>  <b>Phone Number:</b>

### Medication Profile/Pharmaceutical Care Risk Assessment

Care Issues with the appropriateness of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the formulation of the medicine/s?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Poor inhaler technique with MDI ('white smoke') – may be linked to osteoarthritis
Care Issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the contraindications?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Drug Interaction with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	

Side effects with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Problems with concordance?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	<i>Over use of salbutamol inhaler - 4 puffs six times daily.</i>
Care Issue In relation to polypharmacy?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacokinetic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacodynamic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Disease risk factor?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	<i>Smoking is a primary risk factor for COPD</i>
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Taking one or more black triangle medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Duplication of medication	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
<b>Summary:</b> Are there any pharmaceutical care issues of note?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	

#### Patient Profile

<b>General Health:</b> Smoker. Suffers occasional chest infections
<b>Medical conditions:</b> COPD, Osteoarthritis
<b>Allergies and Sensitivities:</b> None known

## Patient Factors: Dispositions

Compromised oral route of administration	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Physical Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Visual Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

## Patient Factors: Organ Function

Hepatic function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Renal function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Lung function:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	<i>Patient has COPD and smokes which will impact on lung function.</i>
Immune status:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

## Patient Factors: Maternal

Pregnant:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Breastfeeding:	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

## Pharmaceutical Care Plan Priority

PCP Priority:	<input type="radio"/> Low Priority <input type="radio"/> Medium Priority <input checked="" type="radio"/> High Priority	<i>Improve inhaler technique.</i> <i>Provide smoking cessation advice and support.</i>
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## Care Plan

Care Issue	Desired outcome	Action	Action by (Pharmacist, GP, Nurse, Patient)	Response
Poor MDI inhaler technique leading to overuse of salbutamol inhaler	Improve inhaler technique or consider a spacer or an alternative type of inhaler	Teach better inhaler technique and review progress	Pharmacist	Technique much improved and patient reporting better control of COPD
Patient is a smoker	Encourage and support the patient to stop smoking	Discuss risks of smoking with patient and offer to	Pharmacist	Patient enrolled on the PHS smoking cessation service
Lifestyle risk factor (patient slightly overweight)	Reduce risk factors	Provide lifestyle advice e.g. healthy diet, take regular exercise, alcohol intake	Pharmacist	Patient is taking more exercise and has lost weight