



Pharmacy Care Record

# Version 12

User Guide



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## Introduction

### About this user guide

This user guide provides guidance on all functionality that corresponds to PCR version 12. Some figures within the document show screens from previous versions of PCR, however, the functionality described is identical to that in version 12.

### Pharmacy Care Record (PCR)

PCR is a secure 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 diet and Gluten-free foods annual health check (support tool assessment)
- Smoking cessation (support tool assessment)
- Patient level function to create SBARs (Pharmacy communication)

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

### What's new in PCR version 12

In PCR version 12, there are major changes to the existing Gluten-free support tool assessment and a new SBAR (pharmacy communication) feature has been added. These changes are supported by new or revised reports and home screen totals.

There are two minor changes to the smoking cessation initial data capture screen. A pregnancy status warning message has been added and new guidance text has been added to the "Shared care between pharmacy and non-pharmacy services" option.

#### Gluten-free

The "Gluten-free support tool assessment" has been renamed to "Gluten-free foods annual health check". The new name is represented on the support tool selection page (below) and throughout the question pages, summary page, and corresponding report names.

New and improved features for the Gluten-free foods annual health check support tool:

- Revised question text for some questions
- Two new questions
- Revised guidance text
- Function to select "Outcomes" on each question page

- Set the next health check date as part of the completion process (Previously set on monitoring page)

There is now additional information that can be recorded in the patient profile about a patient who is indicated as following a Gluten-free diet:

- Annual health check not completed in pharmacy indicator (previously set on 'Monitoring' question page)
- Additional reasons why a patient would not have an annual health check completed in pharmacy
- Patient accepted onto scheme indicator
- Date patient accepted onto scheme

Revised reports and pharmacy home totals and redundant reports and pharmacy home totals removed

### **New questions**

Adverse Effects section – “If yes, has the patient discussed these symptoms with their GP or dietitian?”

Monitoring section - “Have the patient’s folic acid/iron/calcium/Vitamin D supplements been reviewed in the last 12 months?”

### **Reworded questions**

#### Interactions and Precautions (first question)

- From: "Is the patient prescribed folic acid, iron or calcium and vitamin D supplements"
- To: "Is the patient being prescribed folic acid, iron or calcium/ Vitamin D supplementation?"

#### Interactions and Precautions (second question):

- From: "Is the patient aware of how to take these medicines properly, if indicated?" (options are Yes or No)
- To: "If yes, is the patient aware of how to take these medicines, properly, if indicated?" (Options are Yes, No or Not applicable)

#### Adverse Effects (Second question):

- From: "Does the patient have any symptoms that may suggest they are consuming foods that contain gluten?"
- To: "Does the patient have any new/on-going/recurring symptoms of coeliac disease?"

The example screen (below) for “Adverse effects” shows question revisions, new outcomes and revised guidance. Outcomes should be considered and, if relevant based on the discussion had with the patient, selected before moving to the next question page or review page.

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Mon, Apr 24, 2017 13:16

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

**FISHER, Henry (Mr)** Born 01-Jan-1988 (29y) Gender Male CHI No. 0101884052  
 Preferred name |PH:1234|PCD:T|GFD:DCH|GFA:O| Patient Details Last Modified On 16-May-2016 By AppSupport  
 Address 82 Drury Street, ER5 8LP Phone and email 0356384578

[Gluten-free foods annual health check](#) > [Concordance](#) > [Interactions and precautions](#) > **Adverse effects** > [Monitoring](#) > [Review](#)

### Gluten-free foods annual health check

**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 new/ongoing/recurring symptoms that may suggest that they are consuming foods that contain gluten?  Yes  No

If yes, has the patient discussed these symptoms with their GP or dietitian?  Yes  No  N/A

Is the patient aware that adverse effects should be reported?  Yes  No

**Outcomes**

Advice given to patient on what common symptoms are

Patient has symptoms and has been referred to GP

Patient informed that adverse reactions should be reported to their pharmacist / GP / Dietitian

Patients who do not adhere strictly to their diet may experience symptoms such as a decreased appetite, weight loss, pain, diarrhoea, anaemia, mouth ulcers, abdominal bloating, lethargy, and nausea.

[Note: - blood in stools is a rare symptom of non-adherence. Consideration should be given to other possible causes e.g. local causes at perianal area, constipation, inflammatory bowel disease (IBD) or cancer. Where necessary, refer the patient to their GP. If patient is over 50 years old ask if they have submitted a bowel cancer screening test.]

**Actions:**

- Ask patient if they have had any symptoms.
- 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.
- Signpost to information sources on symptoms e.g. NHS Inform website, Coeliac UK leaflet, Coeliac UK website or local group. ([www.nhsinform.co.uk](http://www.nhsinform.co.uk) / [www.coeliac.org.uk](http://www.coeliac.org.uk))
- Check patient is aware of that new, ongoing or recurring symptoms should be reported.
- Discuss sharing any ADRs with the pharmacist, GP or dietitian.

Outcomes can be optionally selected on each question page. They are used to signify what action was taken (e.g. advice given) or planned (referral needed) during the assessment in response to a potential care issue being identified by the person doing the assessment. For example, if the patient indicated (in response to the first question in “Adverse effects”) that they were not aware of the common symptoms that are caused by not following a gluten free diet, the corresponding (first) outcome on that page should be selected if the person doing the assessment was satisfied that they conveyed the appropriate advice to the patient.

Each outcome selected on a question group page is listed on the summary screen together with the question responses (below).

Concordance	
Is the patient adhering to their gluten-free diet?	No +
Does the patient understand how to identify foods that may contain gluten?	No +
Does the patient have information that will support their concordance with a gluten-free diet?	No +
<b>Outcomes</b>	
Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP	
Interactions and precautions	
Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	No +
If yes, is the patient aware of how to take these medicines properly, if indicated?	No +
<b>Outcomes</b>	
Advice given to patient on how to take medicines	

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?	No +
Does the patient have any new/ongoing/recurring symptoms that may suggest that they are consuming foods that contain gluten?	No +
If yes, has the patient discussed these symptoms with their GP or dietitian?	No +
Is the patient aware that adverse effects should be reported?	No +
<b>Outcomes</b>	
Advice given to patient on what common symptoms are	
Patient has symptoms and has been referred to GP	
Monitoring	
Is the patient aware of how many gluten-free units they are able to order each month?	No +
Has the patients folic acid/iron/calcium/Vitamin D supplements been reviewed in the last 12 months?	No +
Height or weight or both not available	No
Height (m)	1.5
Weight (kg)	90
BMI	40 +
<b>Outcomes</b>	
Advice given to patient on the number of units they can order	
General advice given on taking supplements	

Based on the discussion had with the patient, an 'outcome' checkbox can be selected that represents action taken.

### Completion

When the health check is completed the date of the next annual health check must be specified. (This was previously set in the monitoring page), see screen example below.

The screenshot shows the 'Monitoring' section of the assessment form. A question asks: "Is the patient aware of how many gluten-free units they are able to order each month?" with a "Yes" response and a "+" icon. A dialog box is open over the form, titled "Select or enter date for next gluten-free foods annual health check". The date "24-04-2018" is entered in the date field. Below the date field are "Complete" and "Cancel" buttons. In the background, the "Outcomes" section is visible with a text box containing "Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP". At the bottom, a table lists "Care issues associated with this assessment":

Care issue	Earliest review by	Last modified on
> Patient may not be adhering to their gluten free diet		24-Apr-2017 <a href="#">View</a>

[Note: date defaults to one year in the future]

### Patient profile

Some information has moved from the "Monitoring" question page from within an assessment.

- "Gluten-free annual health check not completed in pharmacy" checkbox
- Reason 'not completed in pharmacy' dropdown menu (only displayed if checkbox selected)
- The date of the next gluten-free foods annual health check

Additional information is required to be recorded in the patient profile edit page. These include:

- A checkbox to signify that the patient is accepted onto the (Gluten-free foods) scheme and agreed to annual health checks.
- The date the patient was accepted onto the scheme

**Gluten-free**

Diagnosed coeliac (historical)  Yes  No  Not Recorded

Gluten-free diet

Gluten-free annual health check not completed in pharmacy

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				

Patient accepted onto scheme and agreed to annual health checks

Date patient accepted onto scheme

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



## Pharmacy home

Pharmacy home totals with links to corresponding reports have been changed as illustrated below.

### Up to version 11 (old)

#### Gluten-free

<b>Gluten-free diet set to</b>	
Yes	[14]
Diagnosed Coeliac (DC)	[4]
Dermatitis Herpetiformis (DH)	[3]
Both DC and DH	[4]
Undiagnosed	[3]
<b>Health check scheduled</b>	
Up to 8 weeks from today	[11]

### Version 12 (New)

#### Gluten-free foods annual health check

<u>Following a Gluten-free diet</u>	[24]
<u>All incomplete health checks</u>	[8]
<u>Health checks not completed in pharmacy</u>	[6]
<u>Health checks due in 7 days</u>	[0]
<u>Health checks overdue</u>	[13]
<u>Health checks never completed</u>	[10]

## Reports

Gluten-free reports have been changed as illustrated below.

### Up to version 11 (old)

#### Gluten-free reports

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]

### Version 12 (New)

#### Gluten-free reports

Diagnosed coeliac patients (historical)	[5]
Following a gluten-free diet	[24]
All gluten-free foods annual health checks	[35]
All incomplete (no annual review date set) Gluten-free foods annual health checks	[8]
All completed Gluten-free foods annual health checks	[22]
Gluten-free foods annual health checks due in 7 days from today	[0]
Gluten-free foods annual health checks due in 14 days from today	[0]
Gluten-free foods annual health checks due in 28 days from today	[0]
Annual health check not completed in pharmacy	[6]
Gluten-free foods annual health checks that are overdue	[13]
Following a Gluten-free diet and Gluten-free foods annual health check never completed	[10]

## SBAR

New feature for pharmacists to create/maintain an SBAR (Pharmacy communication) as a PDF document. It is primarily intended for communication between the pharmacy and a GP practice, however, it can be used for communication with other healthcare professionals, too. An SBAR can be signified as a prescription query, referral or other (user specified text).

Key features:

- Create and save an SBAR
- Generate as a PDF (email or fax to recipient)
- Add replies received from SBAR recipients
- View copies of generated PDF

Pharmacists have full access to all SBAR functions. Pharmacy technicians have "Read only" access and are restricted from creating and editing SBARs

An SBAR is created from the SBAR tab on the patient home.

Pharmaceutical care plan		High risk medicine assessments		New medicine interventions		Support tools		SBAR	
<b>SBARs</b>									
Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status				
Prescription query	20-Apr-2017	Jane Smith	Oakview Medical Practice	No	Saved	<a href="#">View (Edit)</a>			
									<a href="#">Create SBAR</a>

Selecting the “Create SBAR” link presents the SBAR type selection screen:

### Create an SBAR

{This will appear as a sub-heading on the generated PDF}

Prescription query  
 Referral  
 Other (Please Specify)

SBAR Details can be entered and if action is required by the recipient this can be detailed:

**FISH, Yvonne (Ms)** Born 06-Sep-1973 (43y) Gender Female CHI No. 0609731246

[CMS](#) [MAS](#) Patient Details Last Modified On 16-May-2016 By AppSupport

Address 6 Fish Crescent, FF1 1FF Phone and email 07811 132435

---

**SBAR**

**Referral**

Recipient  Action required?  Yes  No

Recipient organisation  Date action required by

e.g. 31-07-2015 for the 31st of July 2015

**Situation**

**Assessment**

**Background**

**Recommendation**

Last edited 24-04-2017 by Jane Smith

**Replies**

**Completion** (Complete when no further replies are expected)

Completed **No**


Completed by

Completed on

With text entered the PDF can be created by selecting “Generate PDF”. The PDF can be sent to recipient (e.g. via email). Example PDF:

1234-20170420-150443

**Pharmacy Communication (SBAR)**  
**Prescription query**



**For the attention of:** Receptionist  
**Organisation:** Oakview Medical Practice

**Requested by:** Jane Smith  
**Organisation:** 1234 - Pharmacy  
**Date Created:** 20/04/2017

ACTION REQUIRED BY 27/04/2017

**Patient Details**  
**Name:** Eric Bond  
**CHI:** 3101798558  
**Core Service Registration:**

**Situation**  
The quick brown fox jumps over the lazy dog

**Background**  
The quick brown fox jumps over the lazy dog

**Assessment**  
The quick brown fox jumps over the lazy dog

**Recommendation**  
The quick brown fox jumps over the lazy dog

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

Authorised by:

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

Replies can be added to a created SBAR (E.g. annotated on a returned (e.g. scanned or faxed) PDF or received from the recipient via email:

**SBAR**  
**Prescription query**

<b>Recipient</b>	The receptionist	<b>Action required?</b>	No
<b>Recipient organisation</b>	Meadowbank Medical Centre	<b>Date action required by</b>	

**Situation**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Background**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Assessment**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Recommendation**  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

PDF generated on 24-04-2017 by Jane Smith [View PDF](#)

**Replies**

[Add Reply](#)

24-Apr-2017 14:23 by Jane Smith  
reply text

**Completion**  
*(Complete when no further replies are expected.)*

**Completed** **No**

Completed by

Completed on

[Complete](#)

[return to Patient Home Page](#)

An SBAR can be completed by selecting the “complete” button when no further replies are expected.

A report of all SBARs is accessible from the report summary page (below).

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Mon, Apr 24, 2017 13:33

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

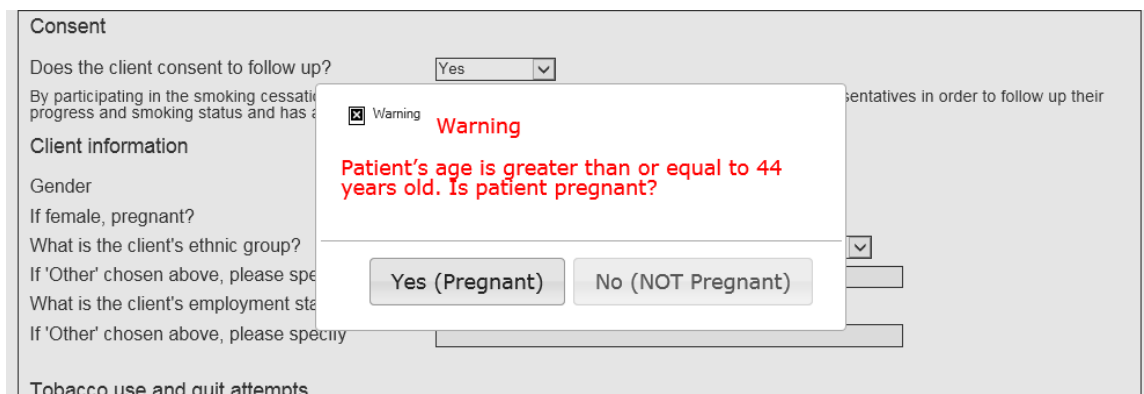
All SBARs								Number of records on report: 8	
								<a href="#">Show/Hide Filter</a>	
Patient Name	Date of birth	CHI	Postcode	Type	Created on (Created by)	Recipient (Organisation)	Status (Replies)	<a href="#">View</a>	<a href="#">Add reply</a>
Ms Yvonne Fish	06-Sep-1973	0609731246	FF1 1FF		24-Apr-2017 (Jane Smith)	Dr D Smith (Oakhill General Practice)	Generated (0)	<a href="#">View</a>	<a href="#">Add reply</a>
Ms Yvonne Fish	06-Sep-1973	0609731246	FF1 1FF		24-Apr-2017 (Jane Smith)	The receptionist (Meadowbank Medical Centre)	Generated with reply (1)	<a href="#">View</a>	<a href="#">Add reply</a>

Note: an SBAR can also be linked to a care issue if created from the link on the care issue detail page.

Minor changes (Smoking cessation initial data capture)

**Pregnancy status warning message**

This warning message is displayed if the “if female, pregnant?” checkbox is selected and the patient’s age is greater than or equal to 44. Selecting “yes (pregnant)” will keep the checkbox selected, selecting “No (not pregnant)” will remove the selection from the checkbox.



**Smoking cessation shared care guidance text**

Additional guidance text regarding the “Shared care between pharmacy and non-pharmacy services?” option, shown below.

Shared care between pharmacy and non-pharmacy services?  Yes  No

Where a Community Pharmacy is providing Smoking Cessation support in conjunction with Health Board Specialist Services, the patient quit attempt should be recorded as 'Shared Care' on PCR. There are issues in relation to duplicate records resulting from shared quit attempts. In order to ensure that the 'Shared Care' quit is recorded on the national database only once the Community Pharmacy must contact the relevant NHS Board prior to entering data on PCR and enquire if the client's quit attempt has been recorded already. These records will be loaded into the National Smoking Cessation Service database and Community Pharmacy will be remunerated for the support provided for these quit attempts. (Shared care records submitted previously will be loaded into the database and remuneration made to the relevant Community Pharmacy).

## Additional resources

This user guide complements the following NES resource packs:

- NES Pharmacy Chronic Medication Service (CMS) Implementation Resource Pack
- NES Pharmacy Gluten-free Foods Service 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.

## 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 foods annual health check	Create and maintain Gluten-free foods annual health check and associated, outcomes, care issues and care issue outcomes.
<b>Section 10:</b> SBAR	Create and maintain SBARs. Generate SBAR as PDF. Add replies to SBAR.
<b>Section 11:</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>• Patient report for pharmacy</li><li>• Outstanding care issues report</li><li>• All SBARs for pharmacy report</li></ul>



- Core service registrations reports (for 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 12: 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 SWAN connection or an authorised corporate network with an approved SWAN gateway.
- Access to PCR is limited to practising registered Pharmacists and Pharmacy Technicians who work in Scottish community pharmacies.
- All Pharmacists and Pharmacy Technicians who practice in Scottish community pharmacies have an individual User ID and password to access PCR.
- A Pharmacist or Pharmacy Technician can only access PCR records for the patients of the community pharmacy where they are currently working.
- All attempts to access, update, and view PCR patient records are audited.

## 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 foods annual health check	Full Access
View Gluten-free foods annual health check	Full Access
Edit Gluten-free foods annual health check	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

## SBAR Tab

Function	Access
<i>SBAR Tab</i>	Full Access
Create SBAR	No Access
Select SBAR Type	No Access
Edit SBAR	No Access
View SBAR	Full Access
Add reply to SBAR	No Access
Generate SBAR	No Access
Complete SBAR	No Access
View list of SBARs	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	
All SBARs	Full Access	Can select SBAR from report to view with read only 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	
Following a gluten-free diet	Full Access	
All gluten-free foods annual health checks	Full Access	
All incomplete (No annual review date set) Gluten-free foods annual health checks	Full Access	
Gluten-free foods annual health checks due within 7 days from today	Full Access	
Gluten-free foods annual health checks due within 14 days from today	Full Access	
Gluten-free foods annual health checks due within 28 days from today	Full Access	
Annual health check not completed in pharmacy	Full Access	
Gluten-free foods annual health checks that are overdue	Full Access	
Following a gluten-free diet and gluten-free foods annual health check never completed	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).

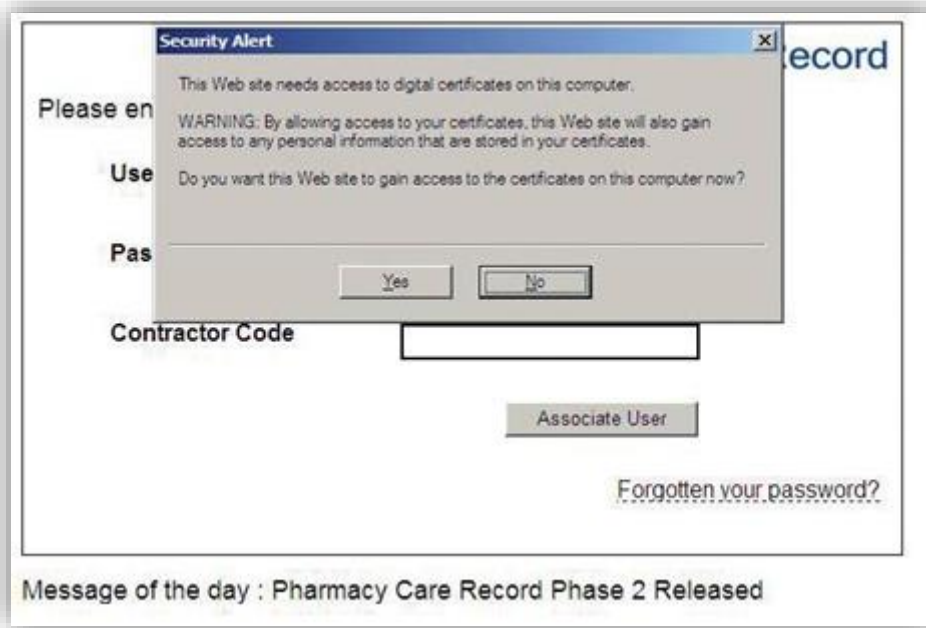


Figure 1-2: PCR association first security alert

**Step 2 - Enter user credentials:**

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

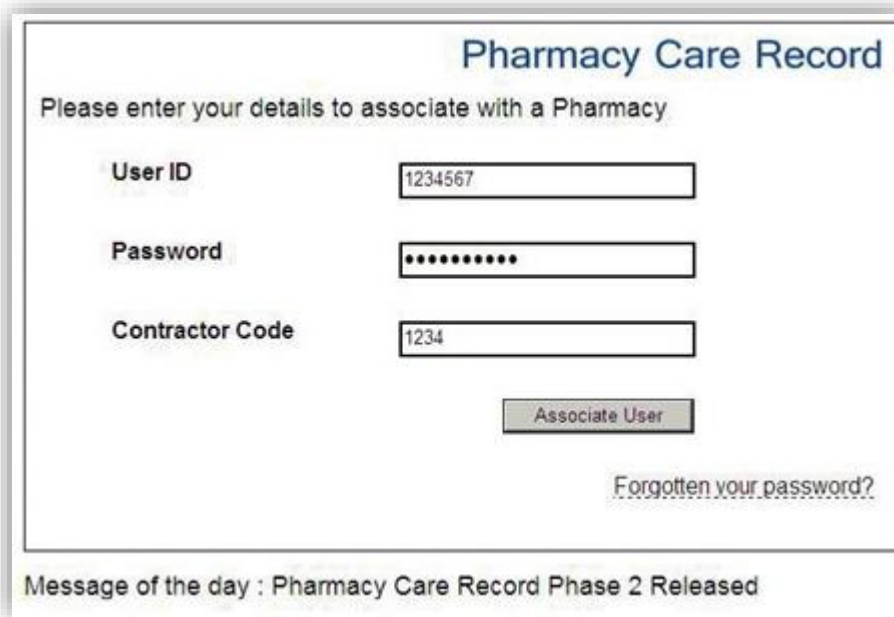
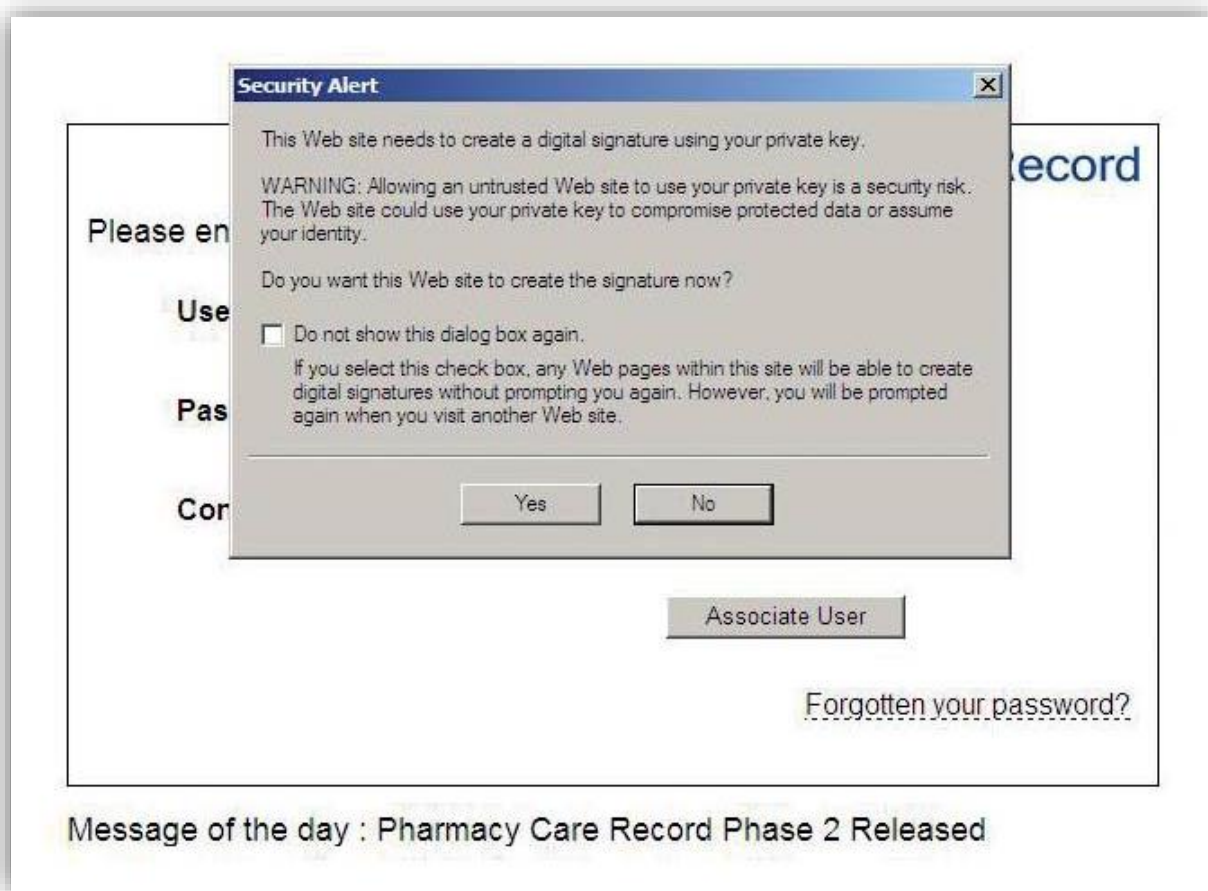


Figure 1-3: Associate User

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

The screenshot shows a web form titled "Pharmacy Care Record" with the heading "Please enter your details to associate with a Pharmacy". The form contains three input fields: "User ID (RPSGB / GPhC)" with the value "TestUser", "Password" (empty), and "Contractor Code" with the value "1234". A "Show password" checkbox is unchecked. Below the fields is an "Associate User" button. A green message states: "Association has been created for TestUser to pharmacy 1234." At the bottom, there are two links: "Click here to login to PCR" and "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 2.2.5.

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 1.3.1 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.



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.

The screenshot displays the Pharmacy Care Record (PCR) interface. At the top, it shows the user's login information: Pharmacy: 1234 - Pharmacy One, User: Testuser - Jane Smith, Last login: Tue, Jan 27, 2015 15:26. The NHS SCOTLAND logo is visible in the top right. A navigation bar includes links for Home, Search, Protocols, Reports, Change password, Manage profile, Yellow card, Help, and Logout. The patient profile for SMITH, Johnathan (Mr) is shown, with details such as Born 03-Feb-2001 (13y 11m), Gender Male, CHI No. 0302010017, and Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ. A modal window titled "Your session has timed out" is centered on the screen, containing a password input field and "Unlock" and "Logout" buttons. The patient profile table below the modal shows various medical conditions and organ functions, all marked as "Not Recorded" or "Not Applicable".

Condition	Status	Action
Compromised oral route of administration	Not Recorded	Detail available
Physical Impairment	Not Recorded	Detail available
Visual Impairment	Not Recorded	Detail available
<b>Organ function</b>		
Hepatic Function	Not Recorded	Detail available
Renal Function	Not Recorded	Detail available
Lung Function	Not Recorded	Detail available
Immune Status	Not Recorded	Detail available
<b>Maternal</b>		
Pregnant	Not Applicable	Detail available
Breast Feeding	Not Applicable	Detail available
<b>Pharmaceutical Care Plan Priority</b>	<b>Not Recorded</b>	Detail available

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.

The screenshot shows the Pharmacy Care Record interface for a patient named SMITH, Johnathan (Mr). The interface includes a top navigation bar with links like Home, Search, Protocols, Reports, Change password, Manage profile, Yellow card, Help, and Logout. Below this is a patient summary section with details like birth date (03-Feb-2001), gender (Male), and CHI No. (0302010017). A modal window titled "Your session has timed out" is overlaid on the patient profile, prompting the user to enter a password and select 'unlock'. The password field is masked with dots. A red error message indicates that the password was incorrect or the user is not the previous active user (code 502). There are "Unlock" and "Logout" buttons at the bottom of the modal. The background patient profile is partially visible, showing sections like Named Pharmacist, Additional Information, General Health, Medical Conditions, Allergies and Sensitivities, Diagnosed coeliac (historical), Gluten-free diet, Complex dispensing patient, Dispositions, Organ function, Maternal, and Pharmaceutical Care Plan Priority.

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 SWAN 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

<a href="#">Manage my profile</a>
<a href="#">Manage my reset password questions</a>
<a href="#">Change password</a>

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:

**Questions already added**

Question	Answer	Created	Actions
Question 1	Question 17		<a href="#">Delete</a>
Question 2	Question 18		<a href="#">Delete</a>
Question 3	Question 19		<a href="#">Delete</a>
Question 4	Question 20	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

[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

----- 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

[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:

**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

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)




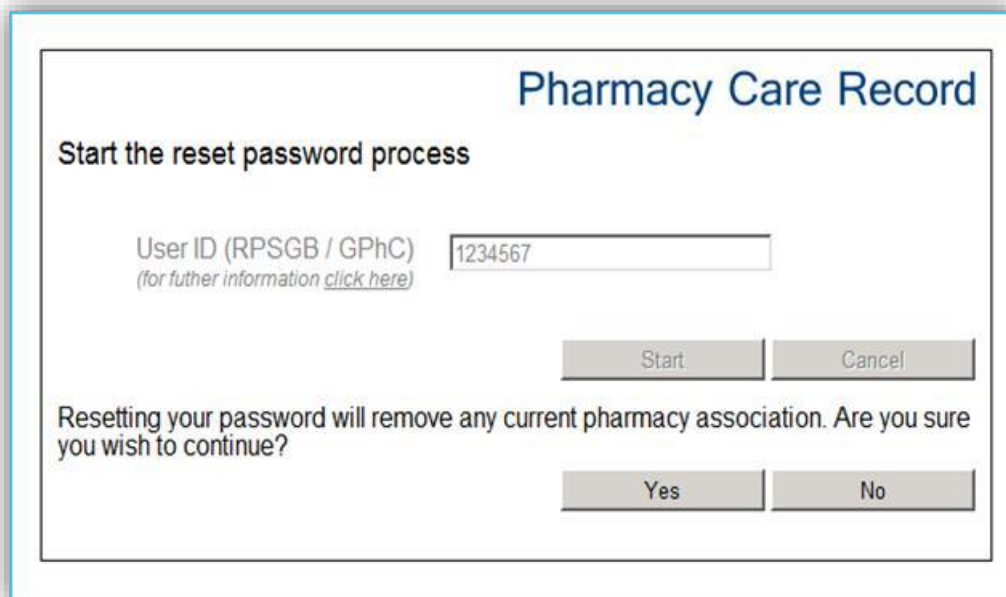
Figure 1-16: Start the reset password process

### 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).





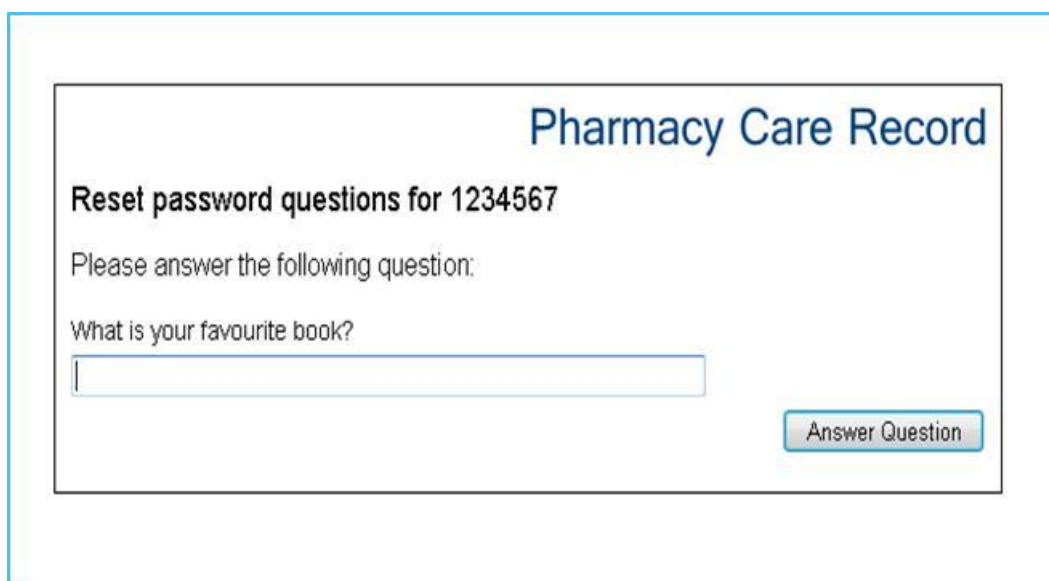
The screenshot shows a web interface titled "Pharmacy Care Record". The main heading is "Start the reset password process". Below this, there is a label "User ID (RPSGB / GPhC)" with a subtext "(for further information [click here](#))". To the right of the label is a text input field containing the number "1234567". Below the input field are two buttons: "Start" and "Cancel". Below these buttons is a confirmation question: "Resetting your password will remove any current pharmacy association. Are you sure you wish to continue?". At the bottom of the form 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". The main heading is "Reset password questions for 1234567". Below this, there is a text prompt: "Please answer the following question:". The question is "What is your favourite book?". Below the question is a single-line text input field. To the right of the input field is a button labeled "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 interface titled "Pharmacy Care Record". Below the title, the heading "Set password for testuser" is displayed. There are two text input fields: the first is labeled "New password:" and the second is labeled "Confirm password:". To the right of the "Confirm password:" field is a button labeled "Set Password".

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.

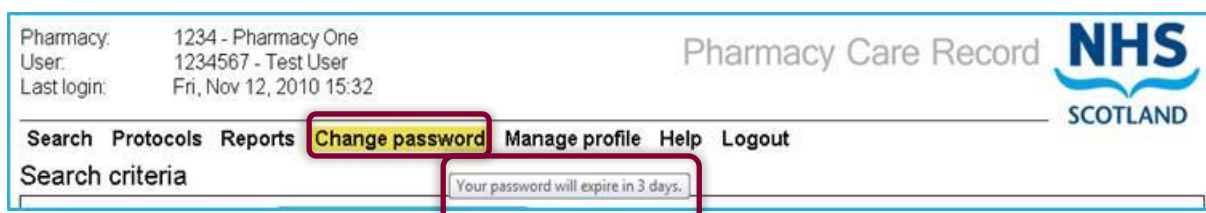


Figure 1-20: Expiring password warning

## 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) 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.

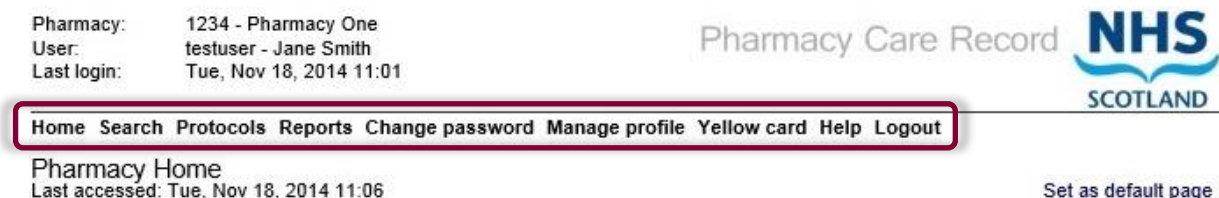


Figure 2-1: PCR high level menu

**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 Home  
Last accessed: Thu, Apr 20, 2017 14:09

Totals		Gluten-free foods annual health check	
<b>Patients for associated pharmacy</b>	[198]	<u>Following a Gluten-free diet</u>	[24]
<b>Initial Assessment complete</b>	[5]	<u>All incomplete health checks</u>	[8]
<b>Care Issues</b>		<u>Health checks not completed in pharmacy</u>	[6]
<u>Total</u>	[496]	<u>Health checks due in 7 days</u>	[0]
<u>Outstanding</u>	[92]	<u>Health checks overdue</u>	[13]
<b>By Type</b>		<u>Health checks never completed</u>	[10]
<u>Standard</u>	[43]		
<u>High Risk Medicines</u>	[3]		
<u>New Medicine Interventions</u>	[29]		
<u>Gluten-free foods annual health check</u>	[41]		
<u>Smoking Cessation</u>	[380]		
<b>Core Service Registrations</b>		<b>New Medicine Interventions</b>	
<u>CMS registered patients with a record in PCR</u>	[5]	<u>Open</u>	[17]
<u>CMS registered patients with NO record in PCR</u>	[3]	<u>Open (without follow-ups)</u>	[1]
<u>CMS registered total</u>	[8]	<u>Completed</u>	[14]
<u>CMS registered patients with initial assessment complete NOT set</u>	[3]	<u>Follow-ups scheduled</u>	
<u>MAS registered patients with a record in PCR</u>	[2]	<u>up to TODAY</u>	[16]
<u>MAS registered patients with NO record in PCR</u>	[2]	<u>up to 7 Days</u>	[17]
<u>MAS registered total</u>	[4]	<u>up to 14 Days</u>	[17]
		<u>up to 28 Days</u>	[17]
		<u>Scheduled appointments (Next 7 days)</u>	
		<u>Mr Norman Grainger</u>	24-Apr-2017 1pm
<b>Smoking Cessation</b>		<b>High Risk Medicines</b>	
<u>MDS</u>		<u>All</u>	[26]
<u>Expiring within the next 7 Days</u>	[0]	<u>Open</u>	[8]
<u>No quit date set</u>	[4]	<u>Warfarin</u>	[3]
<u>Awaiting 4 or 12 week followup</u>	[0]	<u>Methotrexate</u>	[15]
<u>Assessments</u>		<u>Lithium</u>	[8]
<u>No interactions in the last 7 days</u>	[37]		
<u>Open Smoking Cessation assessments</u>	[41]		
<u>Start</u>	[31]		
<u>4 Week</u>	[5]		
<u>12 Week</u>	[1]		

Figure 2-2: Pharmacy Home (Pharmacist View)


Technician view screenshot

**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	Pharmacy Care Record 
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"/> 
	<i>e.g: 31-07-2013 for the 31st of July 2013</i>
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.

### 2.2.3 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

### 2.2.4 Reports

Select the “Reports” menu to view a list of reports available to the user. Reports are explained in section 11 of this guide.

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Thu, Apr 20, 2017 14:05

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

**Reports**

<b>Care issue and patient report</b>	
<a href="#">Outstanding care issues</a>	
<a href="#">Patient report for associated pharmacy</a>	
<a href="#">All SBARs for associated pharmacy</a>	[17]
<b>Core service registrations reports</b>	
<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>	[3]
<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>	[2]
<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>	[5]
<b>Care issues</b>	
<a href="#">Open care issues with review date set</a>	[92]
<a href="#">Open care issues with reviews due in next 7 days</a>	[0]
<a href="#">Open care issues with reviews due in next 14 days</a>	[0]
<a href="#">Open care issues with reviews outstanding</a>	[92]
<a href="#">Open care issues with no outcome ever recorded</a>	[37]
<a href="#">Open care issues with no review date set</a>	[19]
<b>New medicine intervention support tool reports</b>	
<a href="#">All new medicine interventions for the pharmacy</a>	[31]
<a href="#">All open new medicine interventions</a>	[17]
<a href="#">Follow ups scheduled up to TODAY</a>	[16]
<a href="#">Follow ups scheduled up to 7 days from today</a>	[17]
<a href="#">Follow ups scheduled up to 14 days from today</a>	[17]
<a href="#">Follow ups scheduled up to 28 days from today</a>	[17]
<a href="#">Open new medicine interventions without any follow ups</a>	[1]
<a href="#">Completed new medicine interventions</a>	[14]
<b>Complex dispensing patient reports</b>	
<a href="#">Complex dispensing patient set to Yes</a>	[4]
<a href="#">Complex dispensing patient set to No</a>	[4]
<a href="#">Complex dispensing patient set to Not Recorded</a>	[190]
<b>Gluten-free reports</b>	
<a href="#">Diagnosed coeliac patients (historical)</a>	[5]
<a href="#">Following a gluten-free diet</a>	[24]
<a href="#">All gluten-free foods annual health checks</a>	[35]
<a href="#">All incomplete (no annual review date set) Gluten-free foods annual health checks</a>	[8]
<a href="#">All completed Gluten-free foods annual health checks</a>	[22]
<a href="#">Gluten-free foods annual health checks due in 7 days from today</a>	[0]
<a href="#">Gluten-free foods annual health checks due in 14 days from today</a>	[0]
<a href="#">Gluten-free foods annual health checks due in 28 days from today</a>	[0]
<a href="#">Annual health check not completed in pharmacy</a>	[6]
<a href="#">Gluten-free foods annual health checks that are overdue</a>	[13]
<a href="#">Following a Gluten-free diet and Gluten-free foods annual health check never completed</a>	[10]
<b>High risk medicine assessments support tool reports</b>	
<a href="#">All high risk medicine assessments for the pharmacy</a>	[26]
<a href="#">All open high risk medicine assessments</a>	[8]
<a href="#">All completed high risk medicine assessments</a>	[18]
<b>Smoking cessation reports</b>	
<a href="#">Open smoking cessation assessments</a>	[41]
<a href="#">Completed smoking cessation assessments</a>	[27]
<a href="#">No interactions in the last seven days</a>	[37]
<b>MDS</b>	
<a href="#">Expiring within the next seven days</a>	[0]
<a href="#">No quit date set</a>	[4]
<a href="#">Awaiting 4 or 12 week follow up</a>	[0]

Figure 2-6: Reports Page Example

### 2.2.5 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

[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.



## 2.2.6 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).

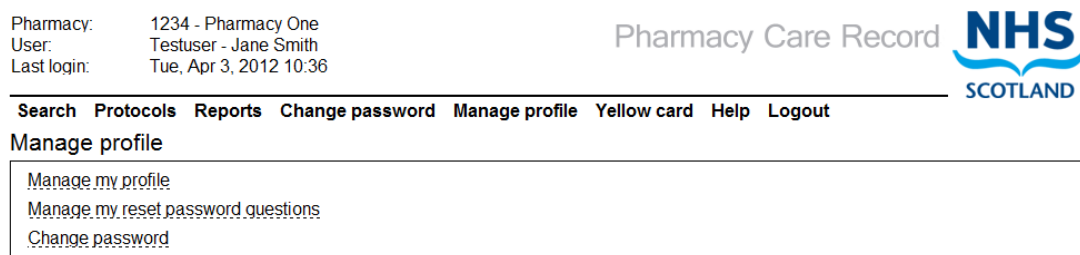


Figure 2-8: available options on “Manage profile” page

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)

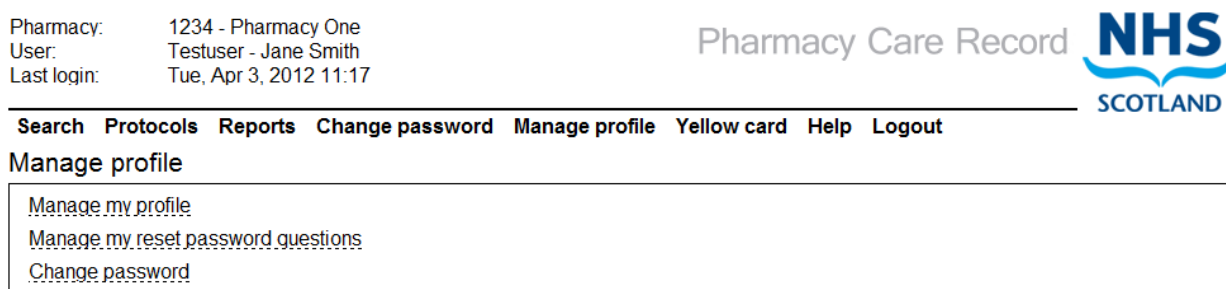


Figure 2-9: Manage profile options

### 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) Testuser  
(for further information [click here](#))

Title

Given Name  \*

Middle Name/Initial

Family Name  \*

Email Address

Display  \*

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

## 2.2.8 Yellow Card

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

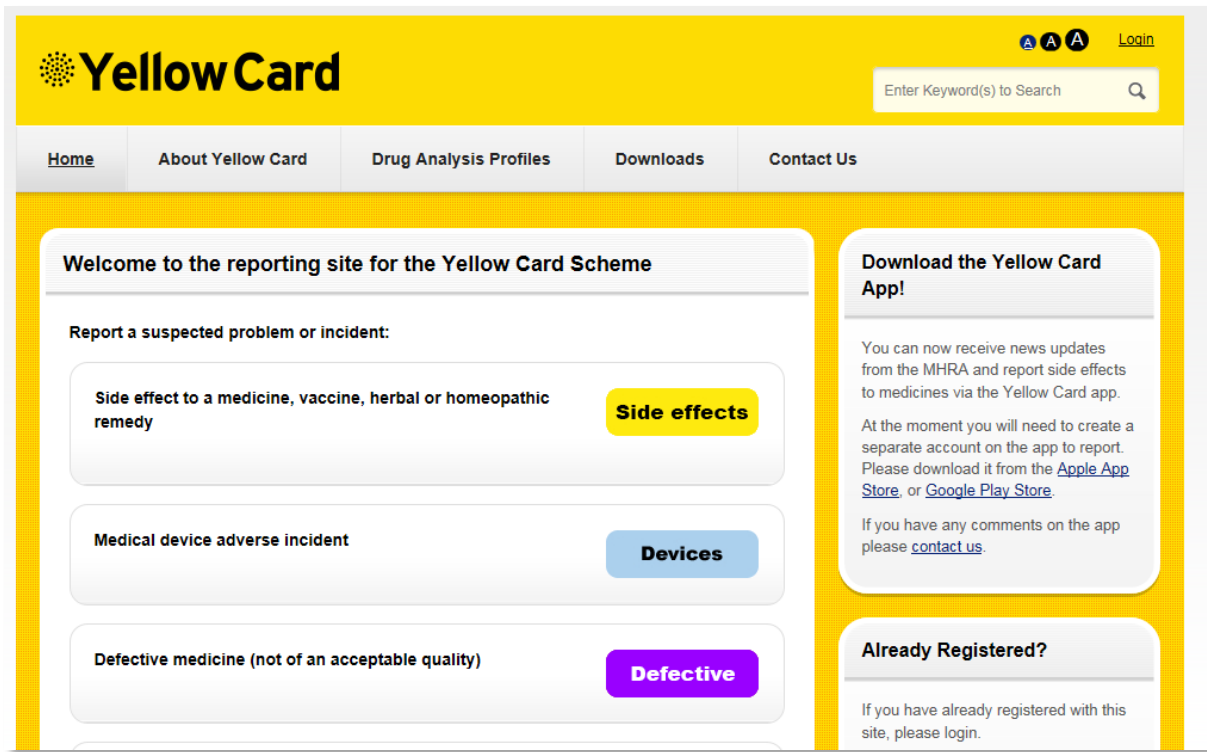


Figure 2-11: MHRA YellowCard website

### 2.2.9 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



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

#### Help

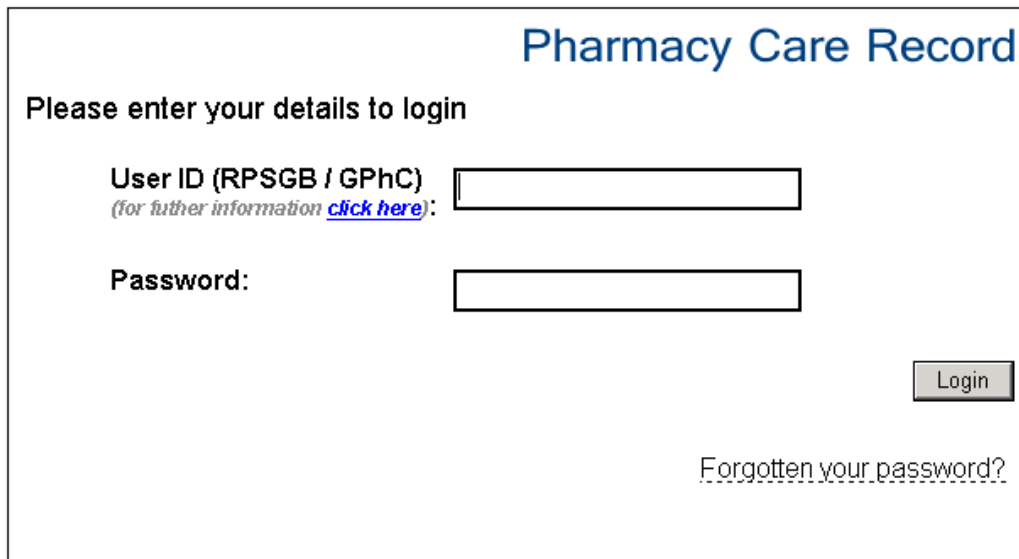
Contact Details	Please contact us at: Tel: 0131 275 6600 or email us : <a href="mailto:nss.psdhelp@nhs.net">nss.psdhelp@nhs.net</a>
User Guide	<u><a href="#">View Guide</a></u> For additional information on PCR and eCMS please see the <a href="#">Quick Reference</a> guide.  For guidance on the PCR system, 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](#).

### 2.2.11 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 login page for the Pharmacy Care Record system. The page has a white background with a black border. At the top right, the title "Pharmacy Care Record" is displayed in a blue, sans-serif font. Below the title, the instruction "Please enter your details to login" is written in a bold, black font. 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. At the bottom right, there is a link "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, Apr 20, 2017 13:06



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

#### Pharmacy Home

Last accessed: Thu, Apr 20, 2017 14:09

<p><b>Totals</b></p> <p><b>Patients for associated pharmacy</b> [198]  <b>Initial Assessment complete</b> [5]</p> <p><b>Care Issues</b></p> <p><u>Total</u> [496]  <u>Outstanding</u> [92]</p> <p><b>By Type</b></p> <p><u>Standard</u> [43]  <u>High Risk Medicines</u> [3]  <u>New Medicine Interventions</u> [29]  <u>Gluten-free foods annual health check</u> [41]  <u>Smoking Cessation</u> [380]</p> <p><b>Core Service Registrations</b></p> <p><u>CMS registered patients with a record in PCR</u> [5]  <u>CMS registered patients with NO record in PCR</u> [3]              CMS registered total [8]  <u>CMS registered patients with initial assessment complete NOT set</u> [3]</p> <p><u>MAS registered patients with a record in PCR</u> [2]  <u>MAS registered patients with NO record in PCR</u> [2]              MAS registered total [4]</p>	<p><b>Gluten-free foods annual health check</b></p> <p><u>Following a Gluten-free diet</u> [24]  <u>All incomplete health checks</u> [8]  <u>Health checks not completed in pharmacy</u> [6]  <u>Health checks due in 7 days</u> [0]  <u>Health checks overdue</u> [13]  <u>Health checks never completed</u> [10]</p> <p><b>New Medicine Interventions</b></p> <p><u>Open</u> [17]  <u>Open (without follow-ups)</u> [1]  <u>Completed</u> [14]</p> <p><b>Follow-ups scheduled</b></p> <p>    <u>up to TODAY</u> [16]              <u>up to 7 Days</u> [17]              <u>up to 14 Days</u> [17]              <u>up to 28 Days</u> [17]</p> <p><b>Scheduled appointments (Next 7 days)</b></p> <p>    <u>Mr Norman Grainger</u>      24-Apr-2017      1pm</p>						
<p><b>Smoking Cessation</b></p> <p><b>MDS</b></p> <p><u>Expiring within the next 7 Days</u> [0]  <u>No quit date set</u> [4]  <u>Awaiting 4 or 12 week followup</u> [0]</p> <p><b>Assessments</b></p> <p><u>No interactions in the last 7 days</u> [37]  <u>Open Smoking Cessation assessments</u> [41]              <u>Start</u> [31]              <u>4 Week</u> [5]              <u>12 Week</u> [1]</p>	<p><b>High Risk Medicines</b></p> <table border="1"> <tr> <td><u>All</u> [26]</td> <td><u>Warfarin</u> [3]</td> </tr> <tr> <td><u>Open</u> [8]</td> <td><u>Methotrexate</u> [15]</td> </tr> <tr> <td></td> <td><u>Lithium</u> [8]</td> </tr> </table>	<u>All</u> [26]	<u>Warfarin</u> [3]	<u>Open</u> [8]	<u>Methotrexate</u> [15]		<u>Lithium</u> [8]
<u>All</u> [26]	<u>Warfarin</u> [3]						
<u>Open</u> [8]	<u>Methotrexate</u> [15]						
	<u>Lithium</u> [8]						

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 foods annual health check
- 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

- Following a gluten-free diet
- All incomplete health checks
- Health check not completed in pharmacy
- Health checks due in 7 days
- Health checks overdue
- Health check never completed

## 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 Postcode can also be entered to limit the number of records returned.

Searches are not case sensitive.

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

---

[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"/> <input type="button" value="📅"/>
	<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



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

#### Search criteria

[Set as default page](#)

Family name	<input type="text" value="s"/>
Given name	<input type="text"/>
Date of birth	<input type="text" value=""/> <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>

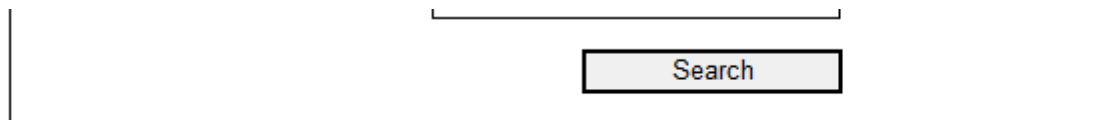
Figure 4-2: Search results list

### 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 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



[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"/> <input type="button" value=""/>
	<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 12 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



[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"/> *	<input type="button" value="Find CHI"/>	Title
Given name	<input type="text"/> Mandatory for CHI search *	Family name	<input type="text"/> *
Preferred name	<input type="text"/>	Gender	<input type="text" value="Male"/> ▾
Date of birth	<input type="text"/> Mandatory for CHI search * <input type="button" value="Calendar"/>	Patient Deceased	<input type="checkbox"/>
e.g: 31-07-2013 for the 31st of July 2013			
<b>Patient Address</b>		<b>Contact Details</b>	
Address 1	<input type="text"/>	Home phone number	<input type="text"/>
Address 2	<input type="text"/>	Mobile phone number	<input type="text"/>
Address 3	<input type="text"/>	Work phone number	<input type="text"/>
Address 4	<input type="text"/>	Email address	<input type="text"/>
Address 5	<input type="text"/>		
Postcode	<input type="text"/> Mandatory for CHI search		

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 

---

[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"/> * <input type="button" value="Find CHI"/>	Title	<input type="text"/>
Given name	<input type="text" value="Mandatory for CHI search"/> *	Family name	<input type="text" value="Mandatory for CHI search"/> *
Preferred name	<input type="text"/>	Gender	<input type="text" value="Male"/> ▾
Date of birth	<input type="text" value="Mandatory for CHI search"/> * <input type="button" value="Calendar"/>	Patient Deceased	<input type="checkbox"/>
<b>Patient Address</b>		<b>Contact Details</b>	
Address 1	<input type="text"/>	Home phone number	<input type="text"/>
Address 2	<input type="text"/>	Mobile phone number	<input type="text"/>
Address 3	<input type="text"/>	Work phone number	<input type="text"/>
Address 4	<input type="text"/>	Email address	<input type="text"/>
Address 5	<input type="text"/>		
Postcode	<input type="text" value="Mandatory for CHI search"/>		

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	<input type="text" value="9876543210"/> *	<input type="button" value="Find CHI"/>	Title	<input type="text"/>
Given name	<input type="text" value="Steven"/> *		Family name	<input type="text" value="Williams"/> *
Preferred name	<input type="text"/>		Gender	<input type="text" value="Male"/>
Date of birth	<input type="text" value="20-08-1979"/> *	<input type="button" value="Calendar"/>	Patient Deceased	<input type="checkbox"/>
<small>e.g: 31-07-2013 for the 31st of July 2013</small>				

<b>Patient Address</b>		<b>Contact Details</b>	
Address 1	<input type="text"/>	Home phone number	<input type="text"/>
Address 2	<input type="text"/>	Mobile phone number	<input type="text"/>
Address 3	<input type="text"/>	Work phone number	<input type="text"/>
Address 4	<input type="text"/>	Email address	<input type="text"/>
Address 5	<input type="text"/>		
Postcode	<input type="text" value="Pa3 3bb"/>		

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	<input type="text"/> *	<input type="button" value="Find CHI"/>	Title	<input type="text"/>
Given name	<input type="text" value="Multiple"/> *		Family name	<input type="text" value="Identical"/> *
Preferred name	<input type="text"/>		Gender	<input type="text" value="Male"/>
Date of birth	<input type="text" value="20-08-1979"/> *	<input type="button" value="Calendar"/>	Patient Deceased	<input type="checkbox"/>
<small>e.g: 31-07-2013 for the 31st of July 2013</small>				

<b>Patient Address</b>			
Address 1	<input type="text"/>		
Address 2	<input type="text"/>		
Address 3	<input type="text"/>		
Address 4	<input type="text"/>		
Address 5	<input type="text"/>		
Postcode	<input type="text" value="Pa3 3bb"/>		

**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.

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	<input type="text"/> *	<input type="button" value="Find CHI"/>	Title	<input type="text"/>
Given name	<input type="text" value="Nomatch"/> *		Family name	<input type="text" value="Williams"/> *
Preferred name	<input type="text"/>		Gender	<input type="text" value="Male"/>
Date of birth	<input type="text" value="20-08-1979"/> *	<input type="button" value="Calendar"/>	Patient Deceased	<input type="checkbox"/>

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

**Patient Address**

Address 1	<input type="text"/>	<input type="text"/>
Address 2	<input type="text"/>	<input type="text"/>
Address 3	<input type="text"/>	<input type="text"/>
Address 4	<input type="text"/>	<input type="text"/>
Address 5	<input type="text"/>	<input type="text"/>
Postcode	<input type="text" value="Pa3 3bb"/>	

**No match found**

Please review your search criteria.

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  
 User: Testuser - Jane Smith  
 Last login: Wed, Dec 30, 2015 14:36

Pharmacy Care Record

---

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

WILLIAMS, Fern

Born **05-May-1985 (30y)** Gender **Female** CHI No. **TTTTTTTTTT**  
 Patient Details Last Modified On **30-Dec-2015** By **Testuser**

MAS

Address Phone and email

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

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

Patient Profile

Show less detail ^

**Named Pharmacist**

**Additional Information**

**General Health**

**Medical Conditions**

**Allergies and Sensitivities**

<b>Diagnosed coeliac (historical)</b>	Not Recorded
<b>Gluten-free diet</b>	Not Recorded
<b>Complex dispensing patient</b>	Not Recorded

**Dispositions**

Patient has a	Compromised oral route of administration	Not Recorded
	Physical Impairment	Not Recorded
	Visual Impairment	Not Recorded

**Organ function**

Patient has an impaired/compromised	Hepatic Function	Not Recorded
	Renal Function	Not Recorded
	Lung Function	Not Recorded
	Immune Status	Not Recorded

**Maternal**

Patient is	Pregnant	Not Recorded
	Breast Feeding	Not Recorded

**Pharmaceutical Care Plan Priority**     **Not Recorded**

Patient Profile Last Modified: 14-Dec-2015 by testuser

[Review](#) [Edit](#)

Pharmaceutical Care Risk Assessment

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

[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>


Print Care Issues  **{Show}**

Click to expand or collapse

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

[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 Jameston NULL JA3 3JJ</b>	Home <b>01357 246 357</b> Work Mobile Email

Print Care Issues  **{Hide}**

Click to expand or collapse

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

[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="p102031231"/> *	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>		<b>Contact Details</b>	
Address 1	<input type="text" value="3 Appleton Parkway"/>	Home phone number	<input type="text" value="01506 000-000"/>
Address 2	<input type="text" value="Livingston"/>	Mobile phone number	<input type="text" value="0777 000-000"/>
Address 3	<input type="text" value="West Lothian"/>	Work phone number	<input type="text"/>
Address 4	<input type="text" value="UK"/>	Email address	<input type="text" value="JohnSmith@home.com"/>
Address 5	<input type="text"/>		
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](#)

**Patient Profile** Show less detail ^

**Named Pharmacist**

**Additional Information**

**General Health**

**Medical Conditions**

**Allergies and Sensitivities**

**Diagnosed coeliac (historical)** Not Recorded

**Gluten-free diet** Not Recorded

**Complex dispensing patient** Not Recorded

**Dispositions**

Patient has a **Compromised oral route of administration** Not Recorded

Physical Impairment Not Recorded

Visual Impairment Not Recorded

**Organ function**

Patient has an impaired/compromised **Hepatic Function** Not Recorded

Renal Function Not Recorded

Lung Function Not Recorded

Immune Status Not Recorded

**Maternal**

Patient is **Pregnant** Not Recorded

Breast Feeding Not Recorded

**Pharmaceutical Care Plan Priority** **Not Recorded**

Patient Profile Last Modified: 14-Dec-2015 by testuser

[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
No records to display.			

[0 of 0] [Review](#)

**Medication**

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

[0 of 0] [Review](#)

**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 5-1: Patient Home

## 5.2 Patient profile

The patient profile is accessed from the Pharmaceutical Care Planning tab on the patient home page (Figure 5-1) is used to record information about the 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
- 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 & Additional details

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.

### General Health

Record information about the patient's general health, medical conditions and allergies.

## Gluten-free

Use this section to record information about a patient who is known to be following a gluten-free diet.

**Gluten-free**

Diagnosed coeliac (historical)  Yes  No  Not Recorded

Gluten-free diet

Gluten-free annual health check not completed in pharmacy

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				

Patient accepted onto scheme and agreed to annual health checks

Date patient accepted onto scheme

Next gluten-free foods annual health check date

### Diagnosed Coeliac (Historical)

This 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

Options are:

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

### Gluten-free annual health check not completed in pharmacy

This option is selected if the annual health check is not required to be completed in the pharmacy

### Reason Gluten free annual health check not completed in Pharmacy

Only displayed if the checkbox above is selected. Possible reasons are:

- Patient is under 16 years old
- Patient is in first year of treatment
- Patient has Dermatitis Herpetiformis diagnosis and does not have Coeliac Disease diagnosis
- Patient has Coeliac Disease CD review by another healthcare professional
- Patient is housebound
- Patient refuses to have a review (Inform GP)
- Other (Please comment)

### “Acceptance onto Gluten-free foods scheme”

There are two steps that must be completed to signify in PCR that the patient has been accepted onto the Gluten-free foods scheme:

- Patient accepted onto scheme and agreed to annual health checks (this checkbox must be ticked)
- Date patient accepted onto scheme (a date must be entered)

#### Date of next Gluten-free foods annual health check

This date is set as part of the completion process for a Gluten-free foods annual health check. It can also be changed here in the patient profile.

### 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).

<b>Initial Assessment</b>	Pregnant	Not Applicable	Detail available
	Breast Feeding	Not Applicable	Detail available
<b>Pharmaceutical Care Plan Priority</b>	<b>Not Recorded</b>		Detail available
Patient Profile Last Modified: 03-Dec-2008 by Initial User			
<a href="#">Review/Edit</a>			

**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**



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

**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.

The screenshot shows a web interface with three tabs: 'Pharmaceutical Care Plan', 'High Risk Medicine Assessments', and 'New Medicine Interventions'. The 'Patient Profile' section is active, displaying a list of patient details. A 'Show less detail' link is visible in the top right corner of the profile area. At the bottom right of the profile area, there is a 'Review/Edit' link.

<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>	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>Medium Priority</b>	
Initial assessment completed on	25-Feb-2013 by Ork5	

Patient Profile Last Modified: 25-Feb-2013 by Ork5

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)

This screenshot shows the same 'Patient Profile' page as Figure 5-5, but with a 'Show more detail' link in the top right corner. The 'Review/Edit' link remains at the bottom right.

<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

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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<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?	<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	<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 <b>Selection required.</b>	<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 <b>Selection required.</b>	<input type="text"/>
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <b>Selection required.</b>	<input type="text"/>
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <b>Selection required.</b>	<input type="text"/>
Side effect/s with one or more medicines?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>

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>

[Add](#)

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

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

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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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**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**

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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**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**

Description	Poor inhaler technique
Modified	13-Apr-2012 by Testuser
<a href="#">Edit</a>	

**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

[Click here to save your care issue outcome](#)

**Care Issue**

Care issue	Care issue type	Earliest review by	Last modified on														
<table border="1"> <tr> <td>Desired outcome</td> <td>Action</td> <td>Action by</td> <td>Response</td> <td>Status</td> <td>Review by</td> <td>Modified date</td> </tr> <tr> <td colspan="7">No child records to display.</td> </tr> </table>	Desired outcome	Action	Action by	Response	Status	Review by	Modified date	No child records to display.							Standard		13-Apr-2012 <a href="#">View</a>
Desired outcome	Action	Action by	Response	Status	Review by	Modified date											
No child records to display.																	

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>
>	Amoxicillan - 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] [Review](#)

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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**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

**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>
>	Amoxicillan - 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	<a href="#">Edit</a>
Quantity		Direction		Dispensed on	Imported		
No child records to display.							

[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.

<b>Core Service Registrations</b>			
<b>Service</b>	<b>Registration status</b>	<b>Registration status effective from</b>	<b>Last update received</b>
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* v

**High risk medicine care risk assessment**

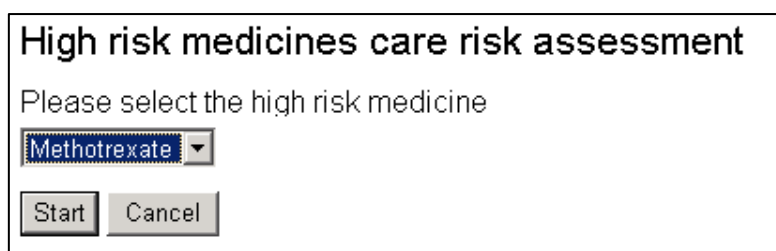
Please select the high risk medicine

Methotrexate v

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 
<a href="#">Search</a> <a href="#">Protocols</a> <a href="#">Reports</a> <a href="#">Change password</a> <a href="#">Manage profile</a> <a href="#">Yellow card</a> <a href="#">Help</a> <a href="#">Logout</a>	
<b>WILLIAMS, Steven (Mr)</b>	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 <span style="float: right;">▼</span>
<a href="#">HRM Methotrexate Process</a> > <a href="#">Concordance</a> > <a href="#">Interactions &amp; precautions</a> > <a href="#">Adverse reactions</a> > <a href="#">Monitoring</a> > <a href="#">Review</a>	
<h4>Concordance</h4> <p>Is the patient taking their methotrexate as prescribed? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose? <input type="radio"/> Yes <input type="radio"/> No</p> <p>If the patient is taking folic acid are they taking it as prescribed? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Does the patient have a methotrexate patient information and monitoring booklet and do they use it? <input type="radio"/> Yes <input type="radio"/> No</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>When indicated for RA and psoriasis methotrexate is prescribed as a single dose taken <b>once a week</b> on the <b>same day</b> 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.</b></p> <p><b>Actions:</b></p> <p><b>Check the patient's understanding of how and when to take their methotrexate and clarify any discrepancies.</b></p> <p><b>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</b></p> <p><b>Advise the patient that methotrexate should be swallowed whole and not crushed or chewed.</b></p> <p><b>Check the patient's understanding of how and when to take their folic acid and clarify any discrepancies.</b></p> <p><b>Advise the patient to carry and use the methotrexate booklet.</b></p> <p><b>Record any care issues in the patient's care plan and agree desired outcomes and actions.</b></p> </div> <div style="text-align: right; margin-top: 10px;"> <span style="border: 1px solid black; padding: 2px 10px;">Next - Interactions &amp; precautions</span> <span style="border: 1px solid black; padding: 2px 10px; margin-left: 20px;">Save &amp; Review</span> </div>	

[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 we follow the i  
**Acti**  
**C**  
**ta**  
**I**  
**f**  
**(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

---

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

**WILLIAMS, Steven (Mr)**
Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111

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

---

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

**Adverse reactions : side effects and toxicity**

<p>Is the patient aware of the common side effects of methotrexate? <span style="float: right;">YesNo</span></p> <p>Is the patient aware of the side effects that occur if they are having a reaction to methotrexate? <span style="float: right;">YesNo</span></p> <p>Is the patient aware of what to do if they are suffering from these signs? <span style="float: right;">YesNo</span></p> <p>Is the patient aware that adverse reactions should be reported? <span style="float: right;">YesNo</span></p>	<p>The most common side effects are:</p> <ul style="list-style-type: none"> <li>Skin (e.g. urticaria, acne, photosensitivity)</li> <li>Haematopoietic reactions ( e.g. anaemia, pneumonia, septicaemia)</li> <li>Alimentary tract (e.g. nausea, vomiting, gingivitis, pharyngitis, intestinal ulceration)</li> <li>Hepatic (e.g. acute hepatitis or cirrhosis)</li> <li>Urogenital (e.g. vaginal discharge or ulcers, cystitis, dysuria)</li> <li>Pulmonary (e.g. acute pulmonary oedema, fibrosis)</li> <li>CNS (e.g. headache, drowsiness or blurred vision)</li> <li>Cardiac (hypotension, deep vein thrombosis)</li> </ul> <p><b>Actions:</b></p> <p><b>Check the patient’s understanding of the side effects of Methotrexate using the information booklet as a prompt.</b></p> <p><b>Ask the patient if they are experiencing any side effects.</b></p> <p><b>Refer them to their GP if side effects appear severe.</b></p> <p><b>Record any care issues in the patient’s care plan and agree desired outcomes and actions.</b></p> <p>Signs of methotrexate toxicity or intolerance are:</p> <ul style="list-style-type: none"> <li>Breathlessness</li> <li>Dry persistent cough</li> <li>Severe vomiting or diarrhoea</li> <li>Sore throat or mouth ulcers</li> <li>Unexplained bleeding or bruising</li> <li>Abdominal discomfort</li> <li>Dark urine</li> </ul> <p><b>Actions:</b></p> <p><b>Check the patient’s understanding of the signs of methotrexate toxicity using the information booklet.</b></p> <p><b>Remind the patient that they should tell the pharmacist, GP or specialist if they experience any side effects that could indicate toxicity.</b></p> <p><b>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.</b></p> <p><b>Advise the patient to report any adverse drug reactions through the MHRA Yellow Card Reporting Scheme either via yourself or by them self reporting.</b></p> <p><b>Record any care issues in the patient’s care plan and agree desired outcomes and actions.</b></p>
--	--

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
<p>Search Protocols Reports Change password Manage profile Yellow card Help Logout</p>	
<p><b>WILLIAMS, Steven (Mr)</b> <span style="float: right;">Born 15-Feb-1945 (67y) Gender Male CHI No. 1111111111</span>  <span style="float: right;">Patient Details Last Modified On 13-Apr-2012 By Testuser</span></p> <p>Address 5 Oakbank Avenue, Glasgow, G12 3NR <span style="float: right;">Phone and email</span></p>	
<p>HRM Methotrexate Process &gt; Concordance &gt; Interactions &amp; precautions &gt; Adverse reactions &gt; <b>Monitoring</b> &gt; Review</p>	
<p><b>Monitoring</b></p> <p>Is the patient aware of how frequently they should have their blood tests done? <span style="float: right;">YesNo</span></p> <p>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")</p> <p>Does the patient record their blood results in their methotrexate monitoring booklet? <span style="float: right;">YesNo</span></p>	<p>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</p> <p><b>three monthly</b> for people stable on methotrexate for years and with no co-morbidities</p> <p><b>four to eight weekly</b> for those in the first couple of years of being on a stable dosage or co-morbidities in long-term users.</p> <p><b>weekly - fortnightly</b> for those just started.</p> <p><b>Actions:</b></p> <p><b>Establish if the patient is receiving regular monitoring.</b></p> <p><b>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.</b></p> <p><b>Advise the patient to discuss their monitoring arrangements with their GP or practice nurse if there appears to be confusion about the interval.</b></p> <p><b>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.</b></p> <p><b>Encourage the patient to carry their methotrexate booklet.</b></p> <p><b>Record any care issues in the patient's care plan and agree desired outcome and actions.</b></p>
<p>Back - Adverse reactions    Save &amp; Review</p>	

[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)**

*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**

#### 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?	<b>Yes</b>	+
Does the patient know what to do if they miss a dose of methotrexate or vomit after taking a dose?	<b>Yes</b>	+
If the patient is taking folic acid are they taking it as prescribed?	<b>Yes</b>	+
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?	<b>Yes</b>	+
Is the patient aware of the side effects that occur if they are having a reaction to methotrexate?	<b>Yes</b>	+
Is the patient aware of what to do if they are suffering from these signs?	<b>Yes</b>	+
Is the patient aware that adverse reactions should be reported?	<b>No</b>	+

**Interactions and precautions**

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

**Monitoring**

Is the patient aware of how frequently they should have their blood tests done?	<b>No</b>	+
Can the patient tell you the date of their last blood test and, if so, when was it?	<b>no</b>	+
Does the patient record their blood results in their methotrexate monitoring booklet?	<b>No</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	
<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	Adverse reactions: side effects and toxicity
Is the patient taking their lithium as prescribed? <b>Unanswered</b> <span style="float: right;">+</span>	Is the patient aware of the common side effects of lithium? <b>Unanswered</b> <span style="float: right;">+</span>
Does the patient know what to do if they miss a dose? <b>Unanswered</b> <span style="float: right;">+</span>	Is the patient aware of the signs of lithium toxicity? <b>Unanswered</b> <span style="float: right;">+</span>
Does the patient have the patient information and recording booklets and alert card and do they use them? <b>Unanswered</b> <span style="float: right;">+</span>	Is the patient aware what might cause lithium toxicity and how to avoid this happening? <b>Unanswered</b> <span style="float: right;">+</span>
Is the patient aware they should check that any newly prescribed medicines don't interact with lithium? <b>Unanswered</b> <span style="float: right;">+</span>	Is the patient aware of what to do if they are suffering from these signs? <b>Unanswered</b> <span style="float: right;">+</span>
Does the patient know that certain OTC medicines (e.g. ibuprofen or Alka Seltzer) can interact with lithium? <b>Unanswered</b> <span style="float: right;">+</span>	Is the patient aware that adverse reactions should be reported? <b>Unanswered</b> <span style="float: right;">+</span>
<b>Interactions and precautions</b>	<b>Monitoring</b>
Has the patient had a blood test to check their lithium levels in the last three months? <b>Unanswered</b> <span style="float: right;">+</span>	

**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 <input type="button" value="Complete assessment"/>
---

[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>	+ . . .
Does the patient know what to do if they miss a dose?	<b>Yes</b>	+ . . .
Does the patient have the patient information and recording booklets and alert card and do they use them?	<b>Yes</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>	+ . . .
Does the patient know that certain OTC medicines (e.g. ibuprofen or miconazole gel) and foods / alcohol can interact with Warfarin?	<b>Yes</b>	+ . . .
		Is the patient aware of the common side effects of Warfarin? <b>Yes</b> + . . .
		Is the patient aware of the signs of over / under anticoagulation? <b>No</b> + . . .
		Is the patient aware what might cause over-anticoagulation and how to avoid this happening? <b>Yes</b> + . . .
		Is the patient aware of what to do if they are suffering from these signs? <b>Yes</b> + . . .
		Is the patient aware to whom adverse reactions should be reported? <b>Yes</b> + . . .
		<b>Monitoring</b>
		Has the patient had a recent blood test to check their INR? <b>Yes</b> + . . .
Use . . . + to add care issues for the specific question.		
<b>Key messages:</b>		<b>Actions:</b>
<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)

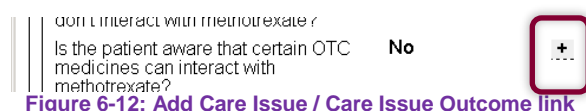



Figure 6-12: Add Care Issue / Care Issue Outcome link

- 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 

---

Search Protocols Reports Change password Manage profile Help Logout

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

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

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

### 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

Response

Status

Review By

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

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.

<p><b>Interactions and precautions</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?</td> <td style="text-align: right; padding: 2px;"><b>Yes</b></td> <td style="text-align: right; padding: 2px;">+</td> </tr> <tr> <td style="padding: 2px;">Is the patient aware that certain OTC medicines can interact with methotrexate?</td> <td style="text-align: right; padding: 2px;"><b>Yes</b></td> <td style="text-align: right; padding: 2px;">+</td> </tr> </table>	Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?	<b>Yes</b>	+	Is the patient aware that certain OTC medicines can interact with methotrexate?	<b>Yes</b>	+	<p><b>Monitoring</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Is the patient aware of how frequently they should have their blood tests done?</td> <td style="text-align: right; padding: 2px;"><b>Yes</b></td> <td style="text-align: right; padding: 2px;">+</td> </tr> <tr> <td style="padding: 2px;">Can the patient tell you the date of their last blood test and, if so, when was it?</td> <td style="text-align: right; padding: 2px;"><b>1</b></td> <td style="text-align: right; padding: 2px;">+</td> </tr> <tr> <td style="padding: 2px;">Does the patient record their blood results in their methotrexate monitoring booklet?</td> <td style="text-align: right; padding: 2px;"><b>Yes</b></td> <td style="text-align: right; padding: 2px;">+</td> </tr> </table>	Is the patient aware of how frequently they should have their blood tests done?	<b>Yes</b>	+	Can the patient tell you the date of their last blood test and, if so, when was it?	<b>1</b>	+	Does the patient record their blood results in their methotrexate monitoring booklet?	<b>Yes</b>	+
Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?	<b>Yes</b>	+														
Is the patient aware that certain OTC medicines can interact with methotrexate?	<b>Yes</b>	+														
Is the patient aware of how frequently they should have their blood tests done?	<b>Yes</b>	+														
Can the patient tell you the date of their last blood test and, if so, when was it?	<b>1</b>	+														
Does the patient record their blood results in their methotrexate monitoring booklet?	<b>Yes</b>	+														
<p><b>Care issues associated with this assessment</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Care issue</th> <th style="width: 20%;">Earliest review by</th> <th style="width: 20%;">Last modified on</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">&gt; Patient unaware that some OTC products can interact with Methotrexate</td> <td style="text-align: center; padding: 2px;">25-Jan-2012</td> <td style="text-align: center; padding: 2px;">09-Jan-2012 <a href="#">View</a></td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">Add</a></p>		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>									
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>														
<p><b>Assessment completion</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Assessment complete</td> <td style="text-align: right; padding: 2px;"><b>No</b></td> </tr> <tr> <td style="padding: 2px;">Assessment completed by</td> <td></td> </tr> <tr> <td style="padding: 2px;">Assessment completed on</td> <td></td> </tr> <tr> <td colspan="2" style="text-align: center; padding: 2px;"> <input type="button" value="Complete assessment"/> </td> </tr> </table>		Assessment complete	<b>No</b>	Assessment completed by		Assessment completed on		<input type="button" value="Complete assessment"/>								
Assessment complete	<b>No</b>															
Assessment completed by																
Assessment completed on																
<input type="button" value="Complete assessment"/>																

[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



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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

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

**Interactions and precautions**

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

**Monitoring**

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

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

[return to Patient Home Page](#)

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

**Assessment completion**

Assessment complete	<b>Yes</b>
Assessment completed by	<b>Testuser</b>
Assessment completed on	<b>06-Jan-2012</b>

[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

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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>

[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

**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 

---

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

**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

**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>	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	

### 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?	<b>Yes</b>	<b>+</b>
Is there anything that the patient would like to know about the medicine and how it should work?	<b>Yes</b>	<b>+</b>
Is there anything else that the patient would like to know about the medicine?	<b>Not recorded</b>	<b>+</b>

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	<b>No</b>
Intervention completed by	
Intervention completed on	

[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)

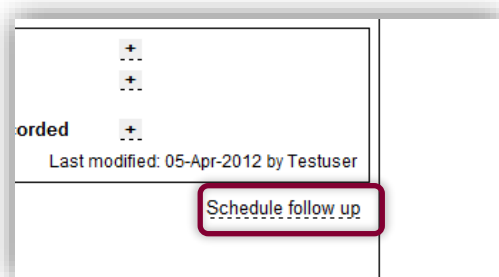


Figure 7-5: “Schedule follow up” link

- 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

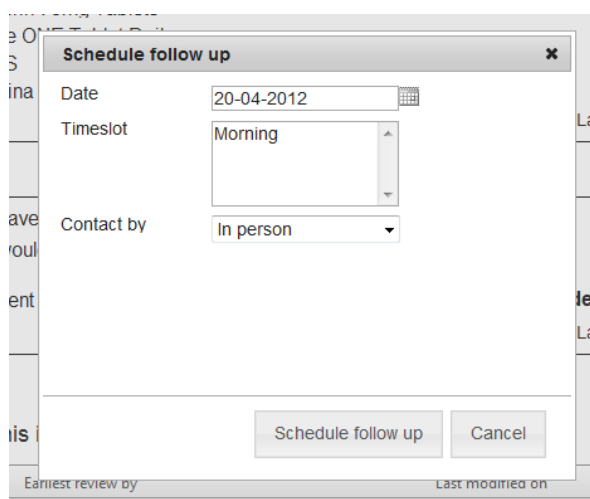


Figure 7-6: Schedule follow up pop up dialogue

- 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?	<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: 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	<b>No</b>
-----------------------	-----------

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      
 Telephone

**Intervention record**

Scheduled date       \*    
e.g: 31-07-2013 for the 31st of July 2013

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

Has the patient started to take the medicine?       Yes     No     Not recorded

Notes

Is the patient still taking the medicine according to the instructions?       Yes     No     Not recorded

Notes

Has the patient missed any doses of the medicine or changed how they take it?       Yes     No     Not recorded

Notes

Is the patient having any problems with the medicine?       Yes     No     Not recorded

Notes

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

Notes

Does the patient require another follow up intervention?       Yes     No     Not recorded

Notes

Is this follow up intervention complete?       Yes     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? **Not recorded** [+](#)  
Last modified: 20-Aug-2012 by testuser

---

**Follow up**

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>	<a href="#">+</a>
Is the patient still taking the medicines according to the instructions?	<b>Yes</b>	<a href="#">+</a>
Has the patient missed any doses of the medicine or changed how they take it?	<b>Yes</b>	<a href="#">+</a>
Is the patient having any problems with the medicine?	<b>Yes</b>	<a href="#">+</a>
Is there anything else that the patient would like to know about the medicine?	<b>No</b>	<a href="#">+</a>
Does the patient require another follow up intervention?	<b>No</b>	<a href="#">+</a>
Is this follow up intervention complete?	<b>Yes</b>	

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  
**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)

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)

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)

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	<b>No</b>
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	<input type="text" value="Patient is having problems or suffering adverse effects"/> *
<b>Care issue outcome</b>	
Desired Outcome	<input type="text" value="Patient is not having problems or suffering adverse effects"/> *
Action	<input type="text"/>
Action By	<input type="text" value="Patient"/>
Response	<input type="text"/>
Status	<input type="text" value="Open"/>
Review By	<input type="text"/>

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

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?	<b>Unanswered</b> <input type="checkbox"/>
Is the patient still taking the medicines according to the instructions?	<b>Unanswered</b> <input type="checkbox"/>
Has the patient missed any doses of the medicine or changed how they take it?	<b>Unanswered</b> <input type="checkbox"/>
Is the patient having any problems with the medicine?	<b>Unanswered</b> <input type="checkbox"/>
Is there anything else that the patient would like to know about the medicine?	<b>Unanswered</b> <input type="checkbox"/>
Does the patient require another follow up intervention?	<b>Unanswered</b> <input type="checkbox"/>
Is this follow up intervention complete?	<b>Unanswered</b> <input type="checkbox"/>

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	<b>No</b>
Intervention completed by	
Intervention completed on	
<input type="button" value="Complete intervention"/>	<div style="border: 1px solid black; padding: 2px;"> <div style="border-bottom: 1px solid black; padding: 2px;">Select...</div> <div style="padding: 2px;">Select...</div> <div style="padding: 2px;">Adhering</div> <div style="padding: 2px;">Not Adhering</div> <div style="padding: 2px;">Lost to intervention</div> </div>

[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 

---

[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

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

Pharmaceutical Care Plan
High Risk Medicine Assessments
New Medicine Interventions

**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 foods annual health check (Support tool)

### 8.1 Overview

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

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

The questions groups are:

- Concordance
- Interactions and precautions
- Adverse effects
- Monitoring

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

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

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

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

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


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

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

To start a Gluten-free foods annual health check:

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

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Wed, Mar 22, 2017 09:50

Pharmacy Care Record 

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

**FERERICK, Freda** *Born 01-Jan-2000 (17y 2m) Gender Female CHI*  
*No. 0101005008*  
*Patient Details Last Modified On 09-Mar-2017 By testuser*  
 Address **Newmill Road, Elgin, IV30 4AH** *Phone and email* Print Care Issues Edit

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

**Support tool assessments**

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Gluten-free foods annual health check	1	Open	22-Mar-2017	testuser		<a href="#">Review</a>
Gluten-free foods annual health check	0	Completed	10-Mar-2017	testuser	10-Mar-2017	testuser <a href="#">Review</a>

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

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Wed, Mar 22, 2017 14:26

Pharmacy Care Record 

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

**FERERICK, Freda** *Born 01-Jan-2000 (17y 2m) Gender Female CHI*  
*No. 0101005008*  
*Patient Details Last Modified On 09-Mar-2017 By testuser*  
 Address **Newmill Road, Elgin, IV30 4AH** *Phone and email* ▼

**Support tool assessment**

Please select the support tool  
Gluten-free foods annual health check ▼

Figure 8-2: Support tool selection

By selecting the “Start” button (Figure 8-2), this will create a new Gluten-free foods annual health check within PCR. Selecting the “Cancel” button will return the system to the patient home page – a Gluten-free foods annual health check will not be created.

### 8.3 Create a Gluten-free foods annual health check

Having completed the steps in section 8.2, this section guides you through the procedure to create and save a Gluten-free foods annual health check.

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

Outcomes are not mandatory but can be selected if required.

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

#### Step 1 - Answer “Concordance” Questions:

- Provide an answer to all questions on the “Concordance” page by selecting either ‘Yes’ or ‘No’ for each question, Figure 8-3.
- Select any applicable Outcomes by clicking the relevant checkbox.

Address Newmill Road, Elgin, IV30 4AH
Phone and email ▼

Gluten-free foods annual health check > Concordance > Interactions and precautions > Adverse effects > Monitoring > Review

#### Gluten-free foods annual health check

##### 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. If a patient has coeliac disease and/or dermatitis herpetiformis, they have to avoid gluten for life. A gluten-free diet is the only treatment for the condition.

Wheat, barley, rye, oats (unless labelled gluten free) and foods made with them will contain gluten. For comprehensive listings signpost to Coeliac UK. On a gluten-free diet they can eat many foods including meat, fish, eggs, fruit, vegetables, rice, potatoes and lentils. They can also eat gluten-free substitute foods and processed foods that don't contain gluten. Most supermarkets now have good ranges of gluten free foods usually in their 'Free From' sections. If a food is labelled gluten free it is safe to eat. Coeliac UK lists thousands of gluten free foods.

A gluten free diet is complex and difficult to adhere to and patients may find it challenging.

**Actions:**

- **Check the patient's feelings about how they are managing their diet.**
- **Check if the patient understands how to identify foods that may contain gluten.**
  - Check patient understands to look at ingredient and allergen labelling. The Coeliac UK website has information on this – [www.coeliac.org.uk](http://www.coeliac.org.uk)
- **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.**
- **Inform the patient about sources of information.**
- **Signpost the patient to NHS Inform (add web address) and Coeliac UK ([www.coeliac.org.uk](http://www.coeliac.org.uk)). The Coeliac UK website has a useful Gluten-free foods checklist <https://www.coeliac.org.uk/document-library/126-gluten-free-checklist/>**
- **Record any care issues in the patient's care plan and agree desired outcomes and actions.**

##### Outcomes

Patient requires support – signposted to information

Patient requires support – signposted to information and referred to dietitian via GP

Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP

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.
- Select any applicable Outcomes by clicking the relevant checkbox.

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Wed, Mar 22, 2017 14:26



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<b>FERERICK, Freda</b>		Born 01-Jan-2000 (17y 2m) Gender Female CHI	
		No. 0101005008	
		Patient Details Last Modified On 09-Mar-2017 By testuser	
Address Newmill Road, Elgin, IV30 4AH		Phone and email	

*Gluten-free foods annual health check > Concordance > Interactions and precautions > Adverse effects > Monitoring > Review*

### Gluten-free foods annual health check

#### Interactions & precautions

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?  Yes  No

If yes, is the patient aware of how to take these medicines properly, if indicated?  Yes  No  N/A

#### Outcomes

Referral of patient to GP for a review of supplements  
 General advice given on taking supplements  
 Advice given to patient on how to take medicines properly

Health risks associated with non-compliance with a gluten-free diet include osteoporosis, chronic malabsorption, and gut lymphoma.

- **Not all patients with Coeliac Disease will require supplements - Check patient’s PMR to determine whether this section is applicable.**
- **Adults with coeliac disease should have at least 1000 milligrams (mg) of calcium in their diet each day. The recommended amount for the general population is 700mg.**
- **Iron and folic acid requirements are the same as the general population guidelines.**

**Actions:**

- **Provide advice on how to take the medicines (where appropriate) properly.**
- **Record any care issues in the patient’s care plan and agree desired outcomes and actions.**
- **Seek prescribing advice on supplements from Health Board where necessary.**

[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.
- Select any applicable Outcomes by clicking the relevant checkbox.

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Wed, Mar 22, 2017 14:26

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<b>FERERICK, Freda</b>	Born 01-Jan-2000 (17y 2m) Gender Female CHI No. 0101005008 Patient Details Last Modified On 09-Mar-2017 By testuser
Address Newmill Road, Elgin, IV30 4AH	Phone and email

Gluten-free foods annual health check > Concordance > Interactions and precautions > **Adverse effects** > Monitoring > Review

### Gluten-free foods annual health check

#### 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 new/ongoing/recurring symptoms that may suggest that they are consuming foods that contain gluten?  Yes  No

If yes, has the patient discussed these symptoms with their GP or dietitian?  Yes  No  N/A

Is the patient aware that adverse effects should be reported?  Yes  No

#### Outcomes

Advice given to patient on what common symptoms are

Patient has symptoms and has been referred to GP

Patient informed that adverse reactions should be reported to their pharmacist / GP / Dietitian

Patients who do not adhere strictly to their diet may experience symptoms such as a decreased appetite, weight loss, pain, diarrhoea, anaemia, mouth ulcers, abdominal bloating, lethargy, and nausea.

[Note: - blood in stools is a rare symptom of non-adherence. Consideration should be given to other possible causes e.g. local causes at perianal area, constipation, Inflammatory bowel disease (IBD) or cancer. Where necessary, refer the patient to their GP. If patient is over 50 years old ask if they have submitted a bowel cancer screening test.]

**Actions:**

- Ask patient if they have had any symptoms.
- 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.
- Signpost to information sources on symptoms e.g. NHS Inform website, Coeliac UK leaflet, Coeliac UK website or local group. (www.nhsinform.co.uk / www.coeliac.org.uk)
- Check patient is aware of that new, ongoing or recurring symptoms should be reported.
- Discuss sharing any ADRs with the pharmacist, GP or dietitian.

[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.
- Select any applicable Outcomes by clicking the relevant checkbox.

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

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

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34



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

<b>ELLISON, Donald</b>	Born 03-Jun-1995 (21y) Gender Male CHI No. 0808081233
	Patient Details Last Modified On 28-Apr-2017 By Testuser
Address Address Line 1, AA1 1AA	Phone and email 0123 456 7890

*Gluten-free foods annual health check > Concordance > Interactions and precautions > Adverse effects > Monitoring > Review*

### Gluten-free foods annual health check

**Monitoring**

Is the patient aware of how many gluten-free units they are able to order each month?  Yes  No

Have the patient's folic acid/iron/calcium/Vitamin D supplements been reviewed in the last 12 months?  Yes  No

Height or weight or both not available

Height (m)

Weight (kg)

**Outcomes**

Advice given to patient on the number of units they can order  
 Patient feels they require more than their recommended units and has been referred to GP / dietitian  
 General advice given on taking supplements  
 Referral of patient to GP for a review of supplements

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 individual dietary needs. More information is at [www.coeliac.org.uk](http://www.coeliac.org.uk)

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 or secondary care to ensure that there are no signs of dietary deficiencies (e.g. iron, calcium) or complications (e.g. thyroid disease, diabetes etc.).

**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.
- If a patient feels they need more than their recommended units, the pharmacist should initially issue their current allowance and then refer the patient to their GP.
- Reinforce that there are a large number of foods that are naturally gluten free including including meat, fish, eggs, fruit, vegetables, rice, potatoes and lentils.

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

Figure 8-6: Monitoring

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

*User Options:*

- Select calculator icon to calculate BMI (if height and weight entered).
- Select the “Back – Adverse effects” button; The system will navigate to the “Adverse reactions” page.
- Click the “Save & Review” button. The system will navigate to the “Summary” page, Figure 8-7



### 8.4 Gluten-free foods annual health check summary page

**FERERICK, Freda** *Born 01-Jan-2000 (17y 2m) Gender Female CHI*  
*No. 0101005008*  
*Patient Details Last Modified On 09-Mar-2017 By testuser*

*Address Newmill Road, Elgin, IV30 4AH* *Phone and email*

*Gluten-free assessment : Concordance > Interactions and precautions > Adverse effects > Monitoring > Review*

#### Gluten-free foods annual health check summary

**Concordance**

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

**Outcomes**

Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP

**Interactions and precautions**

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	<b>Yes</b>	+ ...
If yes, is the patient aware of how to take these medicines properly, if indicated?	<b>No</b>	+ ...

**Outcomes**

General advice given on taking supplements

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?	<b>No</b>	+ ...
Does the patient have any new/ongoing/recurring symptoms that may suggest that they are consuming foods that contain gluten?	<b>Yes</b>	+ ...
If yes, has the patient discussed these symptoms with their GP or dietitian?	<b>No</b>	+ ...
Is the patient aware that adverse effects should be reported?	<b>Yes</b>	+ ...

**Outcomes**

Patient informed that adverse reactions should be reported to their pharmacist / GP / Dietitian

**Monitoring**

Is the patient aware of how many gluten-free units they are able to order each month?	<b>Yes</b>	+ ...
Has the patients folic acid/iron/calcium/Vitamin D supplements been reviewed in the last 12 months?	<b>Yes</b>	+ ...
Height or weight or both not available	<b>Yes</b>	
Height (m)	<b>Unanswered</b>	
Weight (kg)	<b>Unanswered</b>	
BMI	<b>Unanswered</b>	+ ...

**Outcomes**

Referral of patient to GP for a review of supplements

Figure 8-7: Gluten-free health check support tool summary page

Outcomes are displayed beneath each section.

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


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

## 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 foods annual health check Summary page that you want to create a care issue / care issue outcome for, (Figure 8-8)

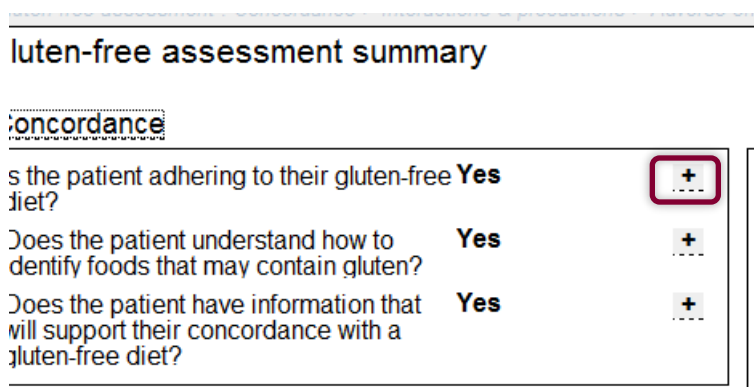


Figure 8-8: Add Care Issue / Care Issue Outcome link

- 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	<input type="text" value="Patient may not be adhering to their gluten free diet"/>	*
<b>Care issue outcome</b>		
Desired Outcome	<input type="text" value="Patient aware that adherence to a gluten free diet is vital for treatment and good health"/>	*
Action	<input type="text"/>	
Action By	<input type="text" value="Patient"/>	
Response	<input type="text"/>	
Status	<input type="text" value="Open"/>	
Review By	<input type="text"/>	
	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 foods annual health check page, Figure 8-7.
- The care issue form is displayed (Figure 8-10)

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

Pharmacy Care Record **NHS**  
 SCOTLAND

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

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

<b>Care issue</b>	
Description of care issue	<input type="text"/> *
<b>Care issue outcome</b>	
Desired Outcome	<input type="text"/> *
Action	<input type="text"/>
Action By	<input type="text" value="Patient"/>
Response	<input type="text"/>
Status	<input type="text" value="Open"/>
Review By	<input type="text" value="e.g: 31-07-2013 for the 31st of July 2013"/>

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 foods annual health check summary page”

- The newly created care issue / care issue outcome will be listed in the “care issues associated with this assessment” grid (Figure 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 > Concordance > Interactions and precautions > Adverse effects > Monitoring > Review

### Gluten-free foods annual health check summary

#### Concordance

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

#### Outcomes

Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP

#### Adverse effects

Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?	<b>No</b>	+ ...
Does the patient have any new/ongoing/recurring symptoms that may suggest that they are consuming foods that contain gluten?	<b>Yes</b>	+ ...
If yes, has the patient discussed these symptoms with their GP or dietician?	<b>No</b>	+ ...
Is the patient aware that adverse effects should be reported?	<b>Yes</b>	+ ...

#### Outcomes

Patient informed that adverse reactions should be reported to their pharmacist / GP / Dietitian

#### Interactions and precautions

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	<b>Yes</b>	+ ...
If yes, is the patient aware of how to take these medicines properly, if indicated?	<b>No</b>	+ ...

#### Outcomes

General advice given on taking supplements

#### Monitoring

Is the patient aware of how many gluten-free units they are able to order each month?	<b>Yes</b>	+ ...
Has the patients folic acid/iron/calcium/Vitamin D supplements been reviewed in the last 12 months?	<b>Yes</b>	+ ...
Height or weight or both not available	<b>Yes</b>	
Height (m)	<b>Unanswered</b>	
Weight (kg)	<b>Unanswered</b>	
BMI	<b>Unanswered</b>	+ ...

#### Outcomes

Referral of patient to GP for a review of supplements

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

---

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
> Patient has little knowledge of gluten containing foods		22-Mar-2017 <a href="#">View</a>

[Add](#)

Figure 8-12: Care Issues Associated with This Assessment

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

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

- From the gluten-free health check summary page, select the “Complete assessment” button in the “Assessment completion” section of the Review screen (Figure 8-13)

Figure 8-13: Complete Assessment

- The system will display the date of the next gluten-free annual health check. (Figure 8-14). This date will be defaulted to one year from today but can be changed if required.
- Click the Complete button.

Figure 8-14: Complete Gluten-free foods annual health check (& set date of next one)

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

Note: By selecting the “Complete” button (Figure 8-16), this will complete the Gluten-free foods annual health check within PCR. Selecting the “Cancel” button will return the system to the Review page – the Gluten-free foods annual health check will not be completed.

<a href="#">Add</a>								
<b>Assessment completion</b>								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%;">Assessment complete</td> <td style="text-align: center;"><b>No</b></td> </tr> <tr> <td>Assessment completed by</td> <td></td> </tr> <tr> <td>Assessment completed on</td> <td></td> </tr> <tr> <td colspan="2" style="padding-top: 5px;"> <input type="button" value="Complete assessment"/> </td> </tr> </table>	Assessment complete	<b>No</b>	Assessment completed by		Assessment completed on		<input type="button" value="Complete assessment"/>	
Assessment complete	<b>No</b>							
Assessment completed by								
Assessment completed on								
<input type="button" value="Complete assessment"/>								

[return to Patient Home Page](#)

**Figure 8-15: Assessment completion details for an “Open” assessment**

- The system will set the status of the annual health check to completed and refresh the page (Figure 8-16)
- The assessment completion details will be updated:
  - Assessment complete = Yes
  - Assessment completed by = Pharmacist ID
  - Assessment completed on = date

<b>Assessment completion</b>	
Assessment complete	<b>Yes</b>
Assessment completed by	<b>Testuser</b>
Assessment completed on	<b>28-Apr-2017</b>

**Figure 8-16: Assessment completion details updated when assessment closed**

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

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

“Open “or “Completed” Gluten-free foods annual health checks can be accessed from the “Support tools” tab on the Patient Home page (Figure 8-17)

### To edit an “Open” Gluten-free foods annual health check:

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

### To view a “Completed” Gluten-free foods annual health check:

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

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

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Thu, Mar 23, 2017 11:05

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

<b>FERERICK, Freda</b>	Born 01-Jan-2000 (17y 2m) Gender Female CHI No. 0101005008 Patient Details Last Modified On 09-Mar-2017 By testuser
Address Newmill Road, Elgin, IV30 4AH	Phone and email <span style="float: right;">▼</span>

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

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

**Support tool assessments**

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Gluten-free foods annual health check	1	Open	22-Mar-2017	testuser		<a href="#">Review</a>
Gluten-free foods annual health check	0	Completed	10-Mar-2017	testuser	10-Mar-2017	testuser <a href="#">Review</a>

**Smoking cessation assessments**

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

[Start support tool assessment](#)

Figure 8-17: Support Tools tab

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

Pharmacy: 1234 - Pharmacy  
 User: testuser - Jane Smith  
 Last login: Thu, Mar 23, 2017 11:05

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

<b>FERERICK, Freda</b>	Born 01-Jan-2000 (17y 2m) Gender Female CHI No. 0101005008 Patient Details Last Modified On 09-Mar-2017 By testuser
Address Newmill Road, Elgin, IV30 4AH	Phone and email

*Gluten-free foods annual health check > Concordance > Interactions and precautions > Adverse effects > Monitoring > Review*

#### Gluten-free foods annual health check

##### 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

**Read only**

##### Outcomes

- Patient requires support – signposted to information
- Patient requires support – signposted to information and referred to dietitian via GP
- Patient does not understand how to identify foods that may contain gluten and referred to dietitian via GP

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. If a patient has coeliac disease and/or dermatitis herpetiformis, they have to avoid gluten for life. A gluten-free diet is the only treatment for the condition.

Wheat, barley, rye, oats (unless labelled gluten free) and foods made with them will contain gluten. For comprehensive listings signpost to Coeliac UK. On a gluten-free diet they can eat many foods including meat, fish, eggs, fruit, vegetables, rice, potatoes and lentils. They can also eat gluten-free substitute foods and processed foods that don't contain gluten. Most supermarkets now have good ranges of gluten free foods usually in their 'Free From' sections. If a food is labelled gluten free it is safe to eat. Coeliac UK lists thousands of gluten free foods.

A gluten free diet is complex and difficult to adhere to and patients may find it challenging.

**Actions:**

- Check the patient's feelings about how they are managing their diet.
- Check if the patient understands how to identify foods that may contain gluten.
  - Check patient understands to look at ingredient and allergen labelling. The Coeliac UK website has information on this – [www.coeliac.org.uk](http://www.coeliac.org.uk)
- 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

Figure 8-18: Read only – completed assessment

**Note:** All data for a completed Gluten-free foods annual health check is shown as read only (Figure 8-18). This means that responses for a completed Gluten-free foods annual health check cannot be edited; however, it is still possible to add a Care Issue / Care Issue Outcome to a completed Gluten-free support tool assessment.

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

## 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 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. 444444444*  
*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. 444444444*  
*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**

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.

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.

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 9-8.

Pharmacy: 1234 - Pharmacy  
 User: technicianuser - Jane Smith  
 Last login: Thu, May 4, 2017 10:50

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

**DASH, Martin (Mr)** Born **28-Apr-1988 (29y)** Gender **Male** CHI No. **2804882977**  
 Preferred name [PH:1234|PCD:T|SCA:O] Patient Details Last Modified On **16-May-2016** By **AppSupport**  
 Address **90 Willow Road, EV3 8PP** Phone and email **0256768965**

**Smoking cessation: initial data capture**

**Consent**

Does the client consent to follow up?

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

If female, pregnant?

What is the client's ethnic group?

If 'Other' chosen above, please specify

What is the client's employment status?

If 'Other' chosen above, please specify

**Tobacco use and quit attempts**

On average, how many cigarettes does the client usually smoke per day?

How soon after waking does the client usually smoke their first cigarette?

How many times has the client tried to quit smoking in the past year?

**Referral and assessment context**

Date referred to service

Referral source(s)

Self-referral	<input 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="checkbox"/>

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 type="checkbox"/>	Home	<input type="checkbox"/>
Prison	<input type="checkbox"/>	Other (please specify)	<input type="checkbox"/>

If 'Other' chosen above, please specify

Date of initial appointment

Intervention(s) used in this quit attempt

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

Where a Community Pharmacy is providing Smoking Cessation support in conjunction with Health Board Specialist Services, the patient quit attempt should be records as 'Shared Care' on PCR. There are issues in relation to duplicate records resulting from shared quit attempts. In order to ensure that the 'Shared Care' quit is recorded on the national database only once the Community Pharmacy must contact the relevant NHS Board prior to entering data on PCR and enquire if the client's quit attempt has been recorded already. These records will be loaded into the National Smoking Cessation Service database and Community Pharmacy will be remunerated for the support provided for these quit attempts. (Shared care records submitted previously will be loaded into the database and remuneration made to the relevant Community Pharmacy).

**Pharmaceutical usage**

Pharmaceutical usage

Total number of weeks of known product use

Figure 9-5: Smoking Cessation Initial Data Capture

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

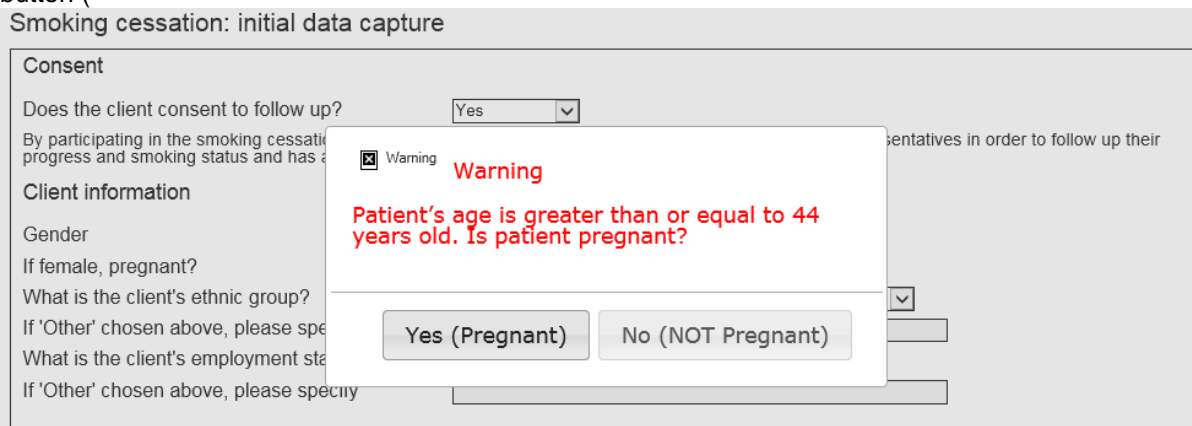


Figure 9-6)

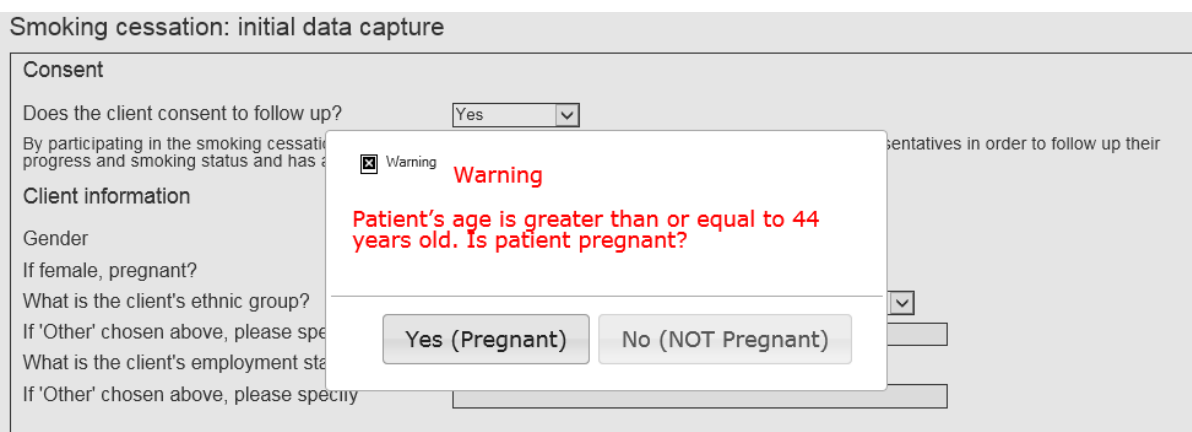


Figure 9-6: Pregnancy status indicator

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 9-7.

This additional information is not included in the MDS submissions.

Group support (open/rolling groups)

If 'Other' chosen above, please specify

Shared care between pharmacy and non-pharmacy services?  Yes  No

**Pharmaceutical usage**

Pharmaceutical usage

Total number of weeks of known product use

**A Varenicline risk assessment must be completed prior to supply**

Does the Varenicline risk assessment indicate that the patient's GP should be contacted to confirm Varenicline appropriateness?

I confirm that I am aware the GP must be informed that the patient will begin on Varenicline

Figure 9-7: 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

[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 21-May-2014 By Testuser  
 Address G12 8DG Phone and email

#### Smoking cessation

##### Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	Unanswered
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
<b>Tobacco use and quit attempts</b>		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	<b>Consent</b>	
<b>Pharmaceutical usage</b>		Consent to follow up	Unanswered
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](#)

##### Assessment completion

Assessment complete  
 Assessment completed by  
 Assessment completed on  
 Please select

Unique reference Not set

**Unanswered questions shown as "Unanswered".**

Figure 9-8: 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” form the “Next action” section, Figure 9-9. The “Confirm quit date and record intervention” page is displayed, Figure 9-10.

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 1023400000

### 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 9-9



## 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	
<b>Client information</b>		<b>Referral and intervention context</b>	
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

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

Product and contact notes

[return to Smoking Cessation Review Page](#)

Figure 9-10: 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>		<i>Born 15-Feb-1945 (69y) Gender Male CHI No. 1111111111</i>	
		<i>Patient Details Last Modified On 11-Jun-2014 By Testuser</i>	
<i>Address 5 Oakbank Avenue, Glasgow, G12 3NR</i>		<i>Phone and email 10234567890</i>	
<b>Client information</b>		<b>Referral and intervention context</b>	
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)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	09-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	Unknown	<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

[return to Smoking Cessation Review Page](#)

**Figure 9-11: 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 9-12.

- 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 postcode 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

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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-May-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment Unanswered Intervention(s) used in this quit attempt Unanswered Intervention (other) Is shared care No <b>Consent</b> Consent to follow up Yes	
Please correct the following validation errors before attempting to proceed: Date of initial appointment is a required field. Intervention(s) is a required field.			
		<a href="#">Edit initial data capture</a> <a href="#">Edit patient</a>	

Figure 9-12: 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 9-13.

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



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<b>WILLIAMS, Steven</b>		<i>Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444</i>	
		<i>Patient Details Last Modified On 21-May-2014 By Testuser</i>	
<i>Address 3 Apples Avenue, G12 8DG</i>		<i>Phone and email 10234000000</i>	

### Smoking cessation

Initial data capture

<b>Client information</b>		<b>Referral and intervention context</b>	
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
<b>Tobacco use and quit attempts</b>		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	<b>Consent</b>	
<b>Pharmaceutical usage</b>		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 <input type="button" value="Complete"/>

Unique reference PCR-C333F2A2-1B01-4862-8DD4-8C4BDA3E8204

Figure 9-13: 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".

SYSTEM

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---

**WILLIAMS, Steven**

Address 3 Apples Avenue, G12 8DG

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

Patient Details Last Modified On 14-May-2014 By Testuser

Phone and email 1023400000

<b>Client information</b>		<b>Referral and intervention context</b>	
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  No

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  Yes

CO reading confirms quit? Yes  No

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 9-14: Submit 4 week data

Before the 4 week minimum data set information can be submitted, any missing or invalid data is highlighted, Figure 9-15.

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	
Address 3 Apples Avenue, G12 8DG		Phone and email 1023400000	
<p><b>Client information</b></p> <p>Gender Male</p> <p>Pregnant No</p> <p>Ethnic group White Scottish</p> <p>Ethnic group (other)</p> <p>Employment status In paid employment</p> <p>Employment status (other)</p> <p><b>Tobacco use and quit attempts</b></p> <p>Cigarettes smoked 11 to 20</p> <p>Time after waking 6 to 30 minutes</p> <p>Number of quit attempts No quit attempts</p> <p><b>Pharmaceutical usage</b></p> <p>Pharmaceutical usage NRT only (combination therapy)</p> <p>Pharmaceutical usage weeks 0</p>		<p><b>Referral and intervention context</b></p> <p>Referral date 01-Apr-2014</p> <p>Referral source Unanswered</p> <p>Referral source (other)</p> <p>Intervention setting(s) Pharmacy</p> <p>Intervention setting (other)</p> <p>Date of initial appointment 14-Apr-2014</p> <p>Intervention(s) used in this quit attempt One to one sessions</p> <p>Intervention (other)</p> <p>Is shared care No</p> <p><b>Consent</b></p> <p>Consent to follow up Yes</p>	

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 9-15: 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 9-16.

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. 4444444444  
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	Intervention setting (other)	
Employment status (other)		Date of initial appointment	03-May-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-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 9-16: 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



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<b>WILLIAMS, Steven</b>	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 9-17: 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 9-18.

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.

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

Unique reference PCR-6893717A-D279-40E8-A46F-D8F290BAF4B7

Figure 9-18

## 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

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

Figure 9-19: 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



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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

**Smoking cessation intervention: record contact attempt**

<b>Client information</b>		<b>Referral and intervention context</b>	
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 9-20: 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



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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 9-21: 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 9-22: 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 9-23.
- Select “Yes” to complete intervention or “No” to cancel

The screenshot shows a web interface for a smoking cessation assessment. A modal dialog box titled "Confirm completion" is centered on the screen. The dialog contains the text: "No further MDS submissions will be possible if you complete this assessment - are you sure you wish to complete the assessment?" and two buttons: "Yes" and "No".

The background form is titled "Smoking cessation" and includes the following sections:

- Initial data capture**
  - Client information**: Gender (Male), Pregnant (No), Ethnic group (White Scottish), Employment status (In paid employment).
  - Referral and intervention context**: Referral date (18-Mar-2015), Referral source (Self-referral), Intervention setting(s) (Primary Care), Date of initial appointment (Unanswered), Intervention(s) used in this quit attempt (Group support (closed groups)), Intervention (other).
  - Tobacco use and quit attempts**: Cigarettes smoked (10 or less), Time after waking (6 to 30 minutes), Number of quit attempts (Once).
  - Pharmaceutical usage**: 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**: A table with columns "Care issue", "Earliest review by", and "Last modified on". It currently displays "No records to display." and has an "Add" link.
- Assessment completion**: Assessment complete, Assessment completed by, Assessment completed on. There is a dropdown menu currently set to "Unsuccessful" and a "Complete" button.
- Unique reference**: Not set

At the bottom left, there is a link: "return to Patient Home Page".

Figure 9-23: 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 9-24 shows all submissions.



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

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<b>WILLIAMS, Steven</b>	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

<b>Client information</b>		<b>Referral and intervention context</b>	
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
<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	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
<b>Pharmaceutical usage</b>			
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 9-24: Submitted minimum dataset

## 10 SBAR

### 10.1 Overview

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

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

The SBAR functions in PCR include:


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

### 10.2 Create an SBAR and define SBAR type

To create an SBAR:

- Log into PCR and identify the patient that you want to create the SBAR for. You may need to create a new patient.
- Select the SBAR tab (on the patient home page). The SBAR list page is displayed, (Figure 10-1)
- Select the “Create SBAR” link, the “Create an SBAR” page will be displayed (Figure 10-2)

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:29

Pharmacy Care Record 

---

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**AMES, Simon (Mr)** Born 30-Jan-1989 (28y) Gender Male CHI No. 3001893397

Patient Details Last Modified On 16-May-2016 By AppSupport

Address Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad... Phone and email 07811111111

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

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

**SBARs**

Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status
No records to display.					

[Create SBAR](#)

Figure 10-1 : Patient home, SBAR Tab

Note: To create an SBAR linked to a care issue refer to section 10.5

**To define an SBAR type:**

- Select the type of SBAR to create
- Click the Create button, the SBAR page will be displayed (Figure 10-2)

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 09:22



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

<b>TRELOW, Mary (Mrs)</b>	Born 09-Mar-1962 (55y) Gender Female CHI No. 0903621827
Preferred name  PH:1234 PCD:T HRMA:C HRM:M	Patient Details Last Modified On 16-May-2016 By AppSupport
Address 371 Fade Way, ED2 8QG	Phone and email 0112343278

**Create an SBAR**

{This will appear as a sub-heading on the generated PDF}

Prescription query  
 Referral  
 Other (please specify)

Figure 10-2: Create an SBAR

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

### 10.3 Enter SBAR (Situation, Background, Assessment, Recommendation)

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

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

**To record SBAR data:**

- Enter SBAR text for all sections, or as much as is applicable or known (Figure 10-3)
- Click the Save button.

If any of the initial data capture information is invalid/missing an error message will be displayed.

**SBAR**

**Referral**

Recipient

Recipient organisation

Action required?  Yes  No

Date action required by  e.g. 31-07-2015 for the 31st of July 2015

**Situation**

**Assessment**

**Background**

**Recommendation**

Last edited 28-04-2017 by Jane Smith

**Replies**

**Completion**  
*(Complete when no further replies are expected.)*

Completed **No**

Completed by

Completed on

[return to Patient Home Page](#)

Figure 10-3: SBAR Details Page

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

## 10.4 Access existing SBARs

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

- Edit
- Generate PDF
- Add reply
- View

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

The stages through which the SBAR progresses are:

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

Saved - View (Edit):

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:29

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**AMES, Simon (Mr)** *Born 30-Jan-1989 (28y) Gender Male CHI No. 3001893397*  
*Patient Details Last Modified On 16-May-2016 By AppSupport*  
 Address **Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad...** *Phone and email 07811111111* ▼  
[Print Care Issues](#) [Edit](#)

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

**SBARs**

Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status	
Referral	28-Apr-2017	Jane Smith	A GP Practice	No	Saved	<a href="#">View (Edit)</a>

[Create SBAR](#)

Figure 10-4: SBAR Tab, example SBAR in saved state

Generated - View (Add Reply):

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:29

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**AMES, Simon (Mr)** *Born 30-Jan-1989 (28y) Gender Male CHI No. 3001893397*  
*Patient Details Last Modified On 16-May-2016 By AppSupport*  
 Address **Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad...** *Phone and email 07811111111* ▼  
[Print Care Issues](#) [Edit](#)

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

**SBARs**

Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status	
Referral	28-Apr-2017	Jane Smith	A GP Practice	No	Generated	<a href="#">View (Add reply)</a>

[Create SBAR](#)

Figure 10-5: SBAR Tab, example SBAR in generated state

Generated with reply - View (Add Reply):

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:29

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**AMES, Simon (Mr)** *Born 30-Jan-1989 (28y) Gender Male CHI No. 3001893397*  
*Patient Details Last Modified On 16-May-2016 By AppSupport*  
 Address **Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad...** *Phone and email 07811111111* ▼  
[Print Care Issues](#) [Edit](#)

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

**SBARs**

Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status	
Referral	28-Apr-2017	Jane Smith	A GP Practice	No	Generated with reply	<a href="#">View (Add reply)</a>

[Create SBAR](#)

Figure 10-6: SBAR tab, example SBAR in generated with reply state

Completed – View

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:29



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**AMES, Simon (Mr)** *Born 30-Jan-1989 (28y) Gender Male CHI No. 3001893397*  
*Patient Details Last Modified On 16-May-2016 By AppSupport*  
 Address **Ames Address Line 1, Ames Address Line 2, Ames Address Line 3, Ames Ad...** *Phone and email 07811111111*

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

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

**SBARs**

Type	Created	Created by	Recipient Organisation	Linked Care Issue	Status
Referral	28-Apr-2017	Jane Smith	A GP Practice	No	Completed <a href="#">View</a>

[Create SBAR](#)

Figure 10-7: SBAR tab, example SBAR in completed state

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

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

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

## 10.5 Create an SBAR linked to a Care Issue

### To create an SBAR linked to a Care Issue:

- Log into PCR and identify the patient that you want to create the SBAR for. You may need to create a new patient.
- Navigate to the Care Issue page by clicking on the Review link which can be found in the Care Issue section of the Patient Home page (figure).
- The Care Issue page is displayed, with any SBARs linked to this Care Issue list displayed in the bottom section of the screen, (Figure 9-1)
- Select the “Create SBAR” link, the “Create an SBAR” page will be displayed (Figure 8-2)
- Select SBAR type and click Create

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 09:22

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**TRELOW, Mary (Mrs)** Born 09-Mar-1962 (55y) Gender Female CHI No. 0903621827  
 Preferred name |PH:1234|PCD:T|HRMA:C|HRM:M| Patient Details Last Modified On 16-May-2016 By AppSupport  
 Address 371 Fade Way, ED2 8QG Phone and email 0112343278

**Care Issue**

Description	Patient cannot tell you the date of their last blood test
Modified	10-Feb-2016 by testuser
High risk medicine	Methotrexate
<a href="#">Edit</a>	

**Care Issue Outcome**

Desired outcome	Action	Action by	Response	Status	Review by	Modified on	Modified by
Ensure that patient has had appropriate blood test performed and knows the date of their next test		Patient		Open	24-Feb-2016	10-Feb-2016	testuser <a href="#">Edit</a>

[Add](#)

**SBARs linked to this care issue**

Type	Created	Created by	Recipient Organisation	Replies	Status	Action
No records to display.						

[Create SBAR](#)

[return to High Risk Medicine Care Risk Assessment](#)  
[return to Care Issues Page](#)  
[return to Patient Home Page](#)

Figure 10-8: Care Issue Detail Page, SBARs linked to this care issue

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


## 10.6 Generate pdf and add replies

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

To generate the SBAR pdf click on the Generate PDF button (Figure 10-3). The pdf will open automatically and can be saved to a local computer drive and then emailed or printed as necessary. The pdf can also be viewed by clicking on the View pdf button. (Figure)

1234-20170508-173445

**Pharmacy Communication (SBAR)**  
For information only



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

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

<u>Patient Details</u>	
Name:	Angela Smith
CHI:	TTTTTTTTT
Core Service Registration:	

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

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

**Assessment**  
I undertook consultation and assessment according to local protocol and supplied a 3-day course of trimethoprim under the PGD.  
Patient has been advised to contact practice if symptoms do not resolve or systemic symptoms develop.

**Recommendation**  
Note for patient record.

**SPACE FOR REPLY**

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

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

Page 1

Figure 10-9: SBAR generated as an Adobe PDF

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

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



**SBAR**

**Prescription query**

Recipient	The receptionist	Action required?	No
Recipient organisation	Meadowbank Medical Centre	Date action required by	

**Situation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Background**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

PDF generated on 24-04-2017 by Jane Smith

**Assessment**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Recommendation**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi sit amet luctus nunc. Morbi vitae fringilla magna. Fusce in ultrices turpis. Sed ac elementum diam. Nulla accumsan leo quis nunc dictum, sit amet commodo quam sollicitudin. Mauris auctor ut felis at sagittis. Proin varius faucibus quam, ut egestas arcu fermentum finibus. Quisque pharetra placerat accumsan. Sed sit amet arcu leo. Etiam vitae condimentum tortor.

**Replies**

24-Apr-2017 14:23 by Jane Smith

reply text

**Completion**  
(Complete when no further replies are expected.)

Completed **No**

Completed by

Completed on

Figure 10-10: SBAR details page with added reply

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

# 11 Reports

## 11.1 Overview

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

- Outstanding Care issues
- Patient report for associated pharmacy
- All SBARs
- Core service registrations
- Open 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 11-1).
- The “Reports” summary page is displayed, Figure 11-2.

Pharmacy: 1234 - Pharmacy  
User: Testuser - Jane Smith  
Last login: Fri, Apr 28, 2017 11:34

Pharmacy Care Record



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

Figure 11-1: reports link on high level menu

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 14:28

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Reports

<b>Care issue and patient report</b>	
<a href="#">Outstanding care issues</a>	
<a href="#">Patient report for associated pharmacy</a>	
<a href="#">All SBARs for associated pharmacy</a>	[18]
<b>Core service registrations reports</b>	
<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>	[3]
<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>	[2]
<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>	[5]
<b>Care issues</b>	
<a href="#">Open care issues with review date set</a>	[93]
<a href="#">Open care issues with reviews due in next 7 days</a>	[0]
<a href="#">Open care issues with reviews due in next 14 days</a>	[0]
<a href="#">Open care issues with reviews outstanding</a>	[93]
<a href="#">Open care issues with no outcome ever recorded</a>	[37]
<a href="#">Open care issues with no review date set</a>	[20]
<b>New medicine intervention support tool reports</b>	
<a href="#">All new medicine interventions for the pharmacy</a>	[31]
<a href="#">All open new medicine interventions</a>	[17]
<a href="#">Follow ups scheduled up to TODAY</a>	[16]
<a href="#">Follow ups scheduled up to 7 days from today</a>	[16]
<a href="#">Follow ups scheduled up to 14 days from today</a>	[16]
<a href="#">Follow ups scheduled up to 28 days from today</a>	[16]
<a href="#">Open new medicine interventions without any follow ups</a>	[1]
<a href="#">Completed new medicine interventions</a>	[14]
<b>Complex dispensing patient reports</b>	
<a href="#">Complex dispensing patient set to Yes</a>	[4]
<a href="#">Complex dispensing patient set to No</a>	[4]
<a href="#">Complex dispensing patient set to Not Recorded</a>	[176]
<b>Gluten-free reports</b>	
<a href="#">Diagnosed coeliac patients (historical)</a>	[5]
<a href="#">Following a gluten-free diet</a>	[20]
<a href="#">All gluten-free foods annual health checks</a>	[31]
<a href="#">All incomplete (no annual review date set) Gluten-free foods annual health checks</a>	[3]
<a href="#">All completed Gluten-free foods annual health checks</a>	[24]
<a href="#">Gluten-free foods annual health checks due in 7 days from today</a>	[1]
<a href="#">Gluten-free foods annual health checks due in 14 days from today</a>	[1]
<a href="#">Gluten-free foods annual health checks due in 28 days from today</a>	[1]
<a href="#">Annual health check not completed in pharmacy</a>	[5]
<a href="#">Gluten-free foods annual health checks that are overdue</a>	[10]
<a href="#">Following a Gluten-free diet and Gluten-free foods annual health check never completed</a>	[6]
<b>High risk medicine assessments support tool reports</b>	
<a href="#">All high risk medicine assessments for the pharmacy</a>	[24]
<a href="#">All open high risk medicine assessments</a>	[6]
<a href="#">All completed high risk medicine assessments</a>	[18]
<b>Smoking cessation reports</b>	
<a href="#">Open smoking cessation assessments</a>	[37]
<a href="#">Completed smoking cessation assessments</a>	[28]
<a href="#">No interactions in the last seven days</a>	[36]
<b>MDS</b>	
<a href="#">Expiring within the next seven days</a>	[0]
<a href="#">No quit date set</a>	[1]
<a href="#">Awaiting 4 or 12 week follow up</a>	[0]

Figure 11-2: 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 11-2.

**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.

## 11.2 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 11-3)

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

Pharmacy Care Record 

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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 11-3: Outstanding care issues report criteria

- Select the "Generate Report" button, all outstanding care issues for the associated pharmacy will be displayed Figure 11-4

**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

**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>
<b>Collapse</b> 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 MultiIssuesPastReview	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 <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 11-4

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.

### 11.3 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 11-5)
- Click the “generate report button” (Figure 11-5)

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**

**Criteria**

PCR creation date, from  to   
e.g. 01-05-2010 for the 1st of May 2010

PCP Priority

Care Issues Recorded


Initial Assessment Completed

Figure 11-5: 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 11-6)

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

Pharmacy Care Record 

---

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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

**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	<span style="background-color: #000080; color: white; padding: 2px;">CMS</span> 1107880122	08-Jan-2016	Medium Priority	15-Dec-2015	0	<a href="#">View</a>
Jamal	Jon	<span style="background-color: #000080; color: white; padding: 2px;">CMS</span> 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 11-6: 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 11-7)

Jamal	Jon	<b>CMS</b>	1002950112	08-Jan-2016	Low Priority	14-Dec-2015	0	<a href="#">View</a>
-------	-----	------------	------------	-------------	--------------	-------------	---	----------------------

**Figure 11-7: “View” link**

## 11.4 SBAR report

### 11.4.1 Report Filter for SBAR reports

The SBAR report has a filter capability.

#### To Show/Hide the filter:

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

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All SBARs							Number of records on report: 8
Patient Name	Date of birth	CHI	Postcode	Type	Created on (Created by)	Recipient (Organisation)	Status (Replies)
							Show/Hide Filter

#### To use the filter and Exclude option:

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

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

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

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



### 11.4.2 All SBARs for the pharmacy

#### Report Overview

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

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Thu, May 4, 2017 11:52



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**All SBARs** Number of records on report: 18  
Show/Hide Filter

Patient Name	Date of birth	CHI	Postcode	Type	Created on (Created by)	Recipient (Organisation)	Status (Replies)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Green  <input type="text"/> x	<input type="button" value="Clear"/> <input type="checkbox"/> Exclude
Patient Name	Date of birth	CHI	Postcode	Type	Created on (Created by)	Recipient (Organisation)	Status (Replies)
Freda Fererick	01-Jan-2000	0101005008		Type of SBAR	02-May-2017 (Jane Smith)	Dr Fiona McDonald (Greenbank Medical Centre)	Saved (0) <a href="#">View (Edit)</a>

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Figure 11-8: All SBARs (With example default filter applied)

#### Report Columns

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

#### “View” Link

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

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

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

## 11.5 Core Service Registrations

### 11.5.1 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 11-9.

#### 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 11-9: Core Service Registration Reports

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

Depending on the patients a pharmacy has registered for 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

## 11.5.2 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>

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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.

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 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.

### 11.5.3 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
							<a href="#">Show/Hide Filter</a>
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>

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#### Report Columns

- Patient Name
- Date of birth
- CHI
- Gender
- Postcode
- 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 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.

### 11.5.4 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.

### 11.5.5 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>

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#### 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.

### 11.5.6 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
					Show/Hide Filter
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>

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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.

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 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.



### 11.5.7 MAS registered patients with NO record in PCR

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Feb 19, 2016 11:34



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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>

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#### Report Columns

- Patient Name
- Date of birth
- CHI
- Gender
- Postcode
- 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** \* Means a field requires data

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 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.

## 11.6 Open Care Issue reports

### 11.6.1 Overview

The following Open care issue reports are available:

- Open care issues with review date set
- Open care issues with reviews due in next 7 days
- Open care issues with reviews due in next 14 days
- Open care issues with reviews outstanding
- Open care issues with no outcome ever recorded
- Open care issues with no review date set

All Open Care Issue reports have a report filter that can be accessed via the “Show/Hide Filter” link. “Open Care issue with review date set” shown as example, Figure 11-10

The filter is applied automatically as you type.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Wed, Apr 8, 2015 15:32



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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>

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Figure 11-10: Report Filter Example

### 11.6.2 Open Care issues with review date set

To run the “Open Care issues with review date set” report:

- Select the “Open Care issues with review date set” link from the “Reports” page
- The report detail will be displayed, Figure 11-11

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28



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Open care issues with review date set							Number of records on report: 14
							Show/Hide Filter
Patient name	Date of birth	CHI	Description	Type	Review by	Modified	
Mr Eric Bond	31-Jan-1979	3101798558	Bond Care Issue 3	Standard	12-Feb-2008	30-Mar-2010	<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 11-11: Open Care issues with review date set

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

#### View Link

Links to “View Care Issue” Page.

### 11.6.3 Open care issues with reviews due in the next 7 days

To run the "Open care issues with reviews due in the next 7 days" report:

- Select the "Open Care issues with review due in the next 7 days" link from the "Reports" page
- The report detail will be displayed, Figure 11-12.

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 7 days							Number of records on report: 4	
							<a href="#">Show/Hide Filter</a>	
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>	

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Figure 11-12: Open Care issues with review due in the next 7 days

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

#### View Link

Links to "View Care Issue" Page.

### 11.6.4 Open care issues with reviews due in the next 14 days

To run the “Open care issues with reviews due in the next 14 days” report:

- Select the “Open Care issues with reviews due in the next 14 days” link from the “Reports” page
- The report detail will be displayed, Figure 11-13.

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
							<a href="#">Show/Hide Filter</a>
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 11-13: Open Care issues with review date up to and including 14 days

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

#### View Link

Links to “View Care Issue” Page.

### 11.6.5 Open care issues with reviews outstanding

To run the “Open care issues with reviews outstanding” report:

- Select the “Open care issues with reviews outstanding” link from the “Reports” page.
- The report detail will be displayed, Figure 11-14.

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 11-14: Open care issues with review date in the past

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Review by (Default Sort, Ascending)
- Modified

#### View Link

Links to “View Care Issue” Page.

### 11.6.6 Open care issues with no outcome ever recorded

To run the “Open care issues with no outcome ever recorded” report:

- Select the “Open care issues with no outcome ever recorded” link from the “Reports” page.
- The report detail will be displayed, Figure 11-15.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28



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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 11-15: Open care issues with no outcome ever recorded

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Modified (Default Sort, Ascending)

#### View Link

Links to “View Care Issue” Page.



### 11.6.7 Open care issues with no review date set

To run the “Open care issues with no review date set” report:

- Select the “Open care issues with no review date set” link from the “Reports” page
- The report detail will be displayed

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 7, 2015 15:28



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Open care issues with no review date set						Number of records on report: 8	
						<a href="#">Show/Hide Filter</a>	
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 11-16: Open care issues with no review date set

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Description
- Type
- Modified (Default Sort, Ascending)

#### View Link

Links to “View Care Issue” Page.

## 11.7 New Medicine intervention reports

### 11.7.1 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.

### 11.7.2 Reports

#### To run any new medicine intervention support tool report:

- Select the report link (Figure 11-17)

Pharmacy: 9895 - Ork5  
 User: Ork5 - Kim Smith  
 Last login: Mon, Feb 25, 2013 09:49

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#### Reports

**Care issue and patient report**

[Outstanding care issues](#)  
[Patient report for associated pharmacy](#)

**New medicine intervention support tool reports**

<a href="#">All new medicine interventions for the pharmacy</a>	[0]
<a href="#">All open new medicine interventions</a>	[0]
<a href="#">Follow ups scheduled up to TODAY</a>	[0]
<a href="#">Follow ups scheduled up to 7 days from today</a>	[0]
<a href="#">Follow ups scheduled up to 14 days from today</a>	[0]
<a href="#">Follow ups scheduled up to 28 days from today</a>	[0]
<a href="#">Open new medicine interventions without any follow ups</a>	[0]
<a href="#">Completed new medicine interventions</a>	[0]

Figure 11-17: New medicine intervention support tool report links

- The report is displayed (Figure 11-18 and Figure 11-19 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 2107720126	A Test	14-Jan-2016	testuser	In person <a href="#">Review</a>

[return to Reports Page](#)

Figure 11-19 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 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	<span style="background-color: blue; color: white; padding: 2px;">MAS LAPSED</span> 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	<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 11-18: 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	<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](#)

Figure 11-19: 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.

## 11.8 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 11-2 (Separate links for Yes, No, or Not recorded)
  - The report detail will be displayed, Figure 11-20.

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

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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>

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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	3108808036	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 11-20: 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.

## 11.9 Gluten-free reports

### 11.9.1 Overview

Gluten-free reports are accessed from a link on the Reports Page, Figure 11-2.

The following reports are available:

- Diagnosed coeliac patients (historical)
- Following a gluten-free diet
- All gluten-free foods annual health checks
- All incomplete (no annual review date set) gluten-free foods annual health checks
- All completed gluten-free foods annual health checks
- Annual health checks scheduled within 7 days from today
- Annual health checks scheduled within 14 days from today
- Annual health checks scheduled within 28 days from today
- Annual health check not completed in pharmacy
- Annual health checks that are overdue
- Following a gluten-free diet and annual health check never completed

#### To view a Gluten-free report:

- Select link from the Reports page
- The report detail will be displayed, (Figure 11-21 ,as example)

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34



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Following a gluten-free diet					Number of records on report: 20		
Patient name	Date of birth	CHI	Post code	Gluten-free diet	Last review completed	Next review	
Miss Juliet Balcony	31-Aug-1995	3108953362	EG35 7UN	Diagnosed coeliac and Dermatitis Herpetiformis	20-Oct-2015	25-Mar-2016	<a href="#">View</a>
Eight Eight	03-Jun-1995	0808081233	AA1 1AA	Undiagnosed	26-Apr-2017	26-Apr-2018	<a href="#">View</a>
Mr Simon Fharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	Never	Not specified	<a href="#">View</a>
Mr Lance Fish	21-Mar-1971	2103718631	ER3 6HH	Diagnosed coeliac	20-Oct-2015	Not specified	<a href="#">View</a>
Mr Henry Fisher	01-Jan-1988	0101884052	ER5 8LP	Diagnosed coeliac	24-Apr-2017	24-Apr-2018	<a href="#">View</a>
Four Four	04-Apr-2004	0404041248		Undiagnosed	26-Apr-2017	26-Mar-2018	<a href="#">View</a>
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	Never	30-Apr-2017	<a href="#">View</a>
Mr Charles Grund	13-Jul-1982	1307822533	EG23 9AR	Undiagnosed	20-Oct-2015	22-Mar-2016	<a href="#">View</a>
Mr Kevin Gryphon	19-Jun-1959	1906597197	EH37 8SD	Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	<a href="#">View</a>
Miss Julie Harford	19-Mar-1987	1903877989	EH63 9WX	Diagnosed coeliac	20-Oct-2015	23-Mar-2016	<a href="#">View</a>
Miss Lorna Mouse	19-Apr-1981	1904810527	EE23 6HP	Diagnosed coeliac and Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018	<a href="#">View</a>
One One	03-Jun-1987	0101011237	AA1 1AA	Diagnosed coeliac and Dermatitis Herpetiformis	26-Apr-2017	26-Apr-2018	<a href="#">View</a>
Mr Chris Starling	23-Oct-1971	2310713899	ED72 9UD	Dermatitis Herpetiformis	20-Oct-2015	24-Mar-2016	<a href="#">View</a>
Mr Bernard Stirling	03-May-1993	0305938371	EF3 7HU	Undiagnosed	Never	22-Mar-2016	<a href="#">View</a>
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	Never	23-Mar-2016	<a href="#">View</a>
judy one tester	04-Jul-1963	0407634444		Diagnosed coeliac	24-Apr-2017	26-Apr-2017	<a href="#">View</a>
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	Never	Not specified	<a href="#">View</a>
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	Never	Not specified	<a href="#">View</a>
TwentySeven TwentySeven	27-Feb-1970	2702701248		Undiagnosed	26-Apr-2017	26-Apr-2018	<a href="#">View</a>
Two Two	02-Feb-2002	0202021238		Dermatitis Herpetiformis	26-Apr-2017	31-Mar-2018	<a href="#">View</a>

[return to Reports Page](#)

Figure 11-21: example gluten-free report



A count of the number of records in the report is also displayed.

A “return to Reports Page” link is shown below the report.

### 11.9.2 Following a gluten free diet

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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Following a gluten-free diet					Number of records on report: 20	
Patient name	Date of birth	CHI	Post code	Gluten-free diet	Last review completed	Next review
Miss Juliet Balcony	31-Aug-1995	3108953362	EG35 7UN	Diagnosed coeliac and Dermatitis Herpetiformis	20-Oct-2015	25-Mar-2016 <a href="#">View</a>
Eight Eight	03-Jun-1995	0808081233	AA1 1AA	Undiagnosed	26-Apr-2017	26-Apr-2018 <a href="#">View</a>
Mr Simon Fharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	Never	Not specified <a href="#">View</a>
Mr Lance Fish	21-Mar-1971	2103718631	ER3 6HH	Diagnosed coeliac	20-Oct-2015	Not specified <a href="#">View</a>
Mr Henry Fisher	01-Jan-1988	0101884052	ER5 8LP	Diagnosed coeliac	24-Apr-2017	24-Apr-2018 <a href="#">View</a>
Four Four	04-Apr-2004	0404041248		Undiagnosed	26-Apr-2017	26-Mar-2018 <a href="#">View</a>
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	Never	30-Apr-2017 <a href="#">View</a>
Mr Charles Grund	13-Jul-1982	1307822533	EG23 9AR	Undiagnosed	20-Oct-2015	22-Mar-2016 <a href="#">View</a>
Mr Kevin Gryphon	19-Jun-1959	1906597197	EH37 8SD	Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018 <a href="#">View</a>
Miss Julie Harford	19-Mar-1987	1903877989	EH63 9WX	Diagnosed coeliac	20-Oct-2015	23-Mar-2016 <a href="#">View</a>
Miss Lorna Mouse	19-Apr-1981	1904810527	EE23 6HP	Diagnosed coeliac and Dermatitis Herpetiformis	25-Apr-2017	25-Apr-2018 <a href="#">View</a>
One One	03-Jun-1987	0101011237	AA1 1AA	Diagnosed coeliac and Dermatitis Herpetiformis	26-Apr-2017	26-Apr-2018 <a href="#">View</a>
Mr Chris Starling	23-Oct-1971	2310713899	ED72 9UD	Dermatitis Herpetiformis	20-Oct-2015	24-Mar-2016 <a href="#">View</a>
Mr Bernard Stirling	03-May-1993	0305938371	EF3 7HU	Undiagnosed	Never	22-Mar-2016 <a href="#">View</a>
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	Never	23-Mar-2016 <a href="#">View</a>
judy one tester	04-Jul-1963	0407634444		Diagnosed coeliac	24-Apr-2017	26-Apr-2017 <a href="#">View</a>
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	Never	Not specified <a href="#">View</a>
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	Never	Not specified <a href="#">View</a>
TwentySeven TwentySeven	27-Feb-1970	2702701248		Undiagnosed	26-Apr-2017	26-Apr-2018 <a href="#">View</a>
Two Two	02-Feb-2002	0202021238		Dermatitis Herpetiformis	26-Apr-2017	31-Mar-2018 <a href="#">View</a>

[return to Reports Page](#)

Report columns:

- Patient name
- Date of birth
- Post code
- Gluten-free diet
- Last review completed
- Next review
- View (Link to patient home)

### 11.9.3 All gluten-free foods annual health checks

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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All gluten-free foods annual health checks					Number of records on report: 30	
Patient name	CHI	Last modified on	Last modified by	Status		
TwentySeven TwentySeven	2702701248	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
One One	0101011237	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Eight Eight	0808081233	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Four Four	0404041248	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Two Two	0202021238	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
judy one tester	0407634444	25-Apr-2017	testuser	Open	<a href="#">Review</a>	
Mr Kevin Gryphon	1906597197	25-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Miss Lorna Mouse	1904810527	25-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	<a href="#">Review</a>	
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	<a href="#">Review</a>	
judy one tester	0407634444	24-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	<a href="#">Review</a>	

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

### 11.9.4 All incomplete (no annual review date set) gluten-free foods annual health checks

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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All incomplete (no annual review date set) Gluten-free foods annual health checks					Number of records on report: 3	
Patient name	CHI	Last modified on	Last modified by	Status		
Claire Telford	0407634444	25-Apr-2017	testuser	Open	<a href="#">Review</a>	
Miss Andrea Sturdy	1606580086	20-Oct-2015	TestUser	Open	<a href="#">Review</a>	
Mr Bernard Stirring	0305938371	20-Oct-2015	TestUser	Open	<a href="#">Review</a>	

[return to Reports Page](#)

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

### 11.9.5 All completed gluten-free foods annual health checks

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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All completed gluten-free foods annual health checks					Number of records on report: 23	
Patient name	CHI	Last modified on	Last modified by	Status		
TwentySeven TwentySeven	2702701248	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
One One	0101011237	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Eight Eight	0808081233	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Four Four	0404041248	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Two Two	0202021238	26-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Mr Kevin Gryphon	1906597197	25-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Miss Lorna Mouse	1904810527	25-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	<a href="#">Review</a>	
Mr Henry Fisher	0101884052	24-Apr-2017	Testuser	Completed	<a href="#">Review</a>	
Claire Telford	0407634444	24-Apr-2017	testuser	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	10-Mar-2016	pcrdvr02user	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	09-Mar-2016	technicianuser	Completed	<a href="#">Review</a>	
Mr Simon Ames	3001893397	09-Mar-2016	technicianuser	Completed	<a href="#">Review</a>	
Mr Phear Allenadale	1310812616	21-Jan-2016	TestUser	Completed	<a href="#">Review</a>	
Miss Juliet Balcony	3108953362	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mr Chris Starling	2310713899	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Miss Julie Harford	1903877989	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mr Charles Grund	1307822533	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mrs Fiona Brandt	1905980949	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mr Lance Fish	2103718631	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Completed	<a href="#">Review</a>	
Mr Jasper Linklater	0805921753	27-Feb-2015	TestUser	Completed	<a href="#">Review</a>	

[return to Reports Page](#)

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status
- Review (Link to health check summary)

### 11.9.6 Annual health checks scheduled within 7 days from today

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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Gluten-free foods annual health checks due in 7 days						Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Last review completed	Next review	
Peter Matthew Green	16-Jan-1969	1601691238		Never	30-Apr-2017	<a href="#">Review</a>

[return to Reports Page](#)

Report columns:

- Patient name
- Date of birth
- CHI

- Post code
- Last review completed
- Next Review
- Review (Link to patient home)

### 11.9.7 Annual health checks scheduled within 14 days from today

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34



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Gluten-free foods annual health checks due in 14 days						Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Last review completed	Next review	
Peter Matthew Green	16-Jan-1969	1601691238		Never	30-Apr-2017	<a href="#">Review</a>

[return to Reports Page](#)

Report columns:

- Patient name
- Date of birth
- CHI
- Post code
- Last review completed
- Next Review
- Review (Link to patient home)

### 11.9.8 Annual health checks scheduled within 28 days from today

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34



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Gluten-free foods annual health checks due in 28 days						Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Last review completed	Next review	
Peter Matthew Green	16-Jan-1969	1601691238		Never	30-Apr-2017	<a href="#">Review</a>

[return to Reports Page](#)

Report columns:

- Patient name
- Date of birth
- CHI
- Post code
- Last review completed
- Next Review
- Review (Link to patient home)

### 11.9.9 Annual health check not completed in pharmacy

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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Gluten-free annual health check not completed in pharmacy						Number of records on report: 5
Patient name	CHI	Last modified on	Last modified by	Status		
Mrs Ginny Drummond	3110947722	20-Oct-2015	TestUser	Open		<a href="#">Review</a>
Mrs Fiona Brandt	1905980949	20-Oct-2015	TestUser	Completed		<a href="#">Review</a>
Mr Lance Fish	2103718631	20-Oct-2015	TestUser	Completed		<a href="#">Review</a>
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Open		<a href="#">Review</a>
Mr Zymun Byrtch	0311780296	14-Oct-2015	TestUser	Completed		<a href="#">Review</a>

[return to Reports Page](#)

Report columns:

- Patient name
- CHI
- Last modified on
- Last modified by
- Status (Open, Completed, or "None")
- Review (Link to patient home)

### 11.9.10 Annual health checks that are overdue

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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Gluten-free foods annual health checks overdue						Number of records on report: 10
Patient name	CHI	Annual health check date	Last modified on	Last modified by	Status	
Claire Telford	0407634444	26-Apr-2017	25-Apr-2017	testuser	Open	<a href="#">Review</a>
Mr Phear Allenadale	1310812616	23-Jan-2017	21-Jan-2016	TestUser	Open	<a href="#">Review</a>
Mr Simon Ames	3001893397	07-Apr-2016	10-Mar-2016	pcrdvr02user	Completed	<a href="#">Review</a>
Miss Juliet Balcony	3108953362	25-Mar-2016	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>
Mr Chris Starling	2310713899	24-Mar-2016	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>
Miss Julie Harford	1903877989	23-Mar-2016	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>
Miss Andrea Sturdy	1606580086	23-Mar-2016	20-Oct-2015	TestUser	Open	<a href="#">Review</a>
Mr Charles Grund	1307822533	22-Mar-2016	20-Oct-2015	TestUser	Completed	<a href="#">Review</a>
Mr Bernard Stirring	0305938371	22-Mar-2016	20-Oct-2015	TestUser	Open	<a href="#">Review</a>
Mr Jasper Linkater	0805921753	27-Feb-2016	22-Jan-2016	TestUser	Open	<a href="#">Review</a>

[return to Reports Page](#)

Report columns:

- Patient name
- CHI
- Annual health check date
- Last modified on
- Last modified by
- Status
- Review (Link to patient home)

### 11.9.11 Following a gluten-free diet and annual health check never completed

Pharmacy: 1234 - Pharmacy  
 User: Testuser - Jane Smith  
 Last login: Fri, Apr 28, 2017 11:34

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Following a gluten-free diet and gluten-free foods annual health check never completed					Number of records on report: 6
Patient name	Date of birth	CHI	Post code	Gluten-free diet	
Mr Simon Fharsee	07-Nov-1976	0711766819	ED2 7TN	Dermatitis Herpetiformis	<a href="#">View</a>
Peter Matthew Green	16-Jan-1969	1601691238		Diagnosed coeliac	<a href="#">View</a>
Mr Bernard Stirling	03-May-1993	0305938371	EF3 7HU	Undiagnosed	<a href="#">View</a>
Miss Andrea Sturdy	16-Jun-1958	1606580086	ER17 9PH	Diagnosed coeliac	<a href="#">View</a>
TwentyFive TwentyFive	25-Feb-1950	2502501245		Diagnosed coeliac and Dermatitis Herpetiformis	<a href="#">View</a>
TwentyFour TwentyFour	24-Feb-1940	2402401230		Diagnosed coeliac	<a href="#">View</a>

[return to Reports Page](#)

Report columns:

- Patient name
- Date of birth
- CHI
- Postcode
- Gluten-free diet
- View (Link to patient home)

## 11.10 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 11-2.

- 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 11-2.
- The report detail will be displayed, Figure 11-22 (Example shown “All”)

Pharmacy: 9895 - Ork5  
 User: ork5 - Kim Smith  
 Last login: Mon, Feb 25, 2013 11:49

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### High Risk Medicine Assessments

**Criteria**

Type

Status

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 11-22: 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.

## 11.11 Smoking Cessation support tool assessment reports

### 11.11.1 Report Filter for smoking cessation reports

All smoking cessation reports have the same filter capability.

#### To Show/Hide the filter:

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

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="Apr"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="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>

Show  
or  
Hide  
Filter

[return to Reports Page](#)

#### 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.



### 11.11.2 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 11-23: All open

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- 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.

### 11.11.3 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



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Today: Wednesday, 11th June, 2014							
<b>All Completed smoking cessation assessments for the pharmacy</b>							
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>

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**Figure 11-24: All Completed smoking cessation assessments**

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- Last contact week
- Quit attempt week
- MDS

#### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

### 11.11.4 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"/>	<input type="text" value="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>

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Figure 11-25

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- 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.

### 11.11.5 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 11-26: Smoking cessation assessments awaiting four or twelve week follow up**

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- 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.

### 11.11.6 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
				<a href="#">Show/Hide Filter</a>
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 11-27: Assessments with no quit date set**

#### Report Columns

- Patient Name
- Core service indicator icon
- Date of birth
- CHI
- Postcode

#### “View” Link

Select the “View” link at the right-hand-side of the report to view the assessment review page.

### 11.11.7 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



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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>

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Figure 11-28

#### Report Columns

- Patient Name
- Core service indicator icon
- Quit Date
- Date of birth
- CHI
- Postcode
- 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.

## 12 PMR interface to PCR

### 12.1 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 12-1 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 12-1: link to PCR from the Cegedim RX Pharmacy Manager PMR

Figure 12-2 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.

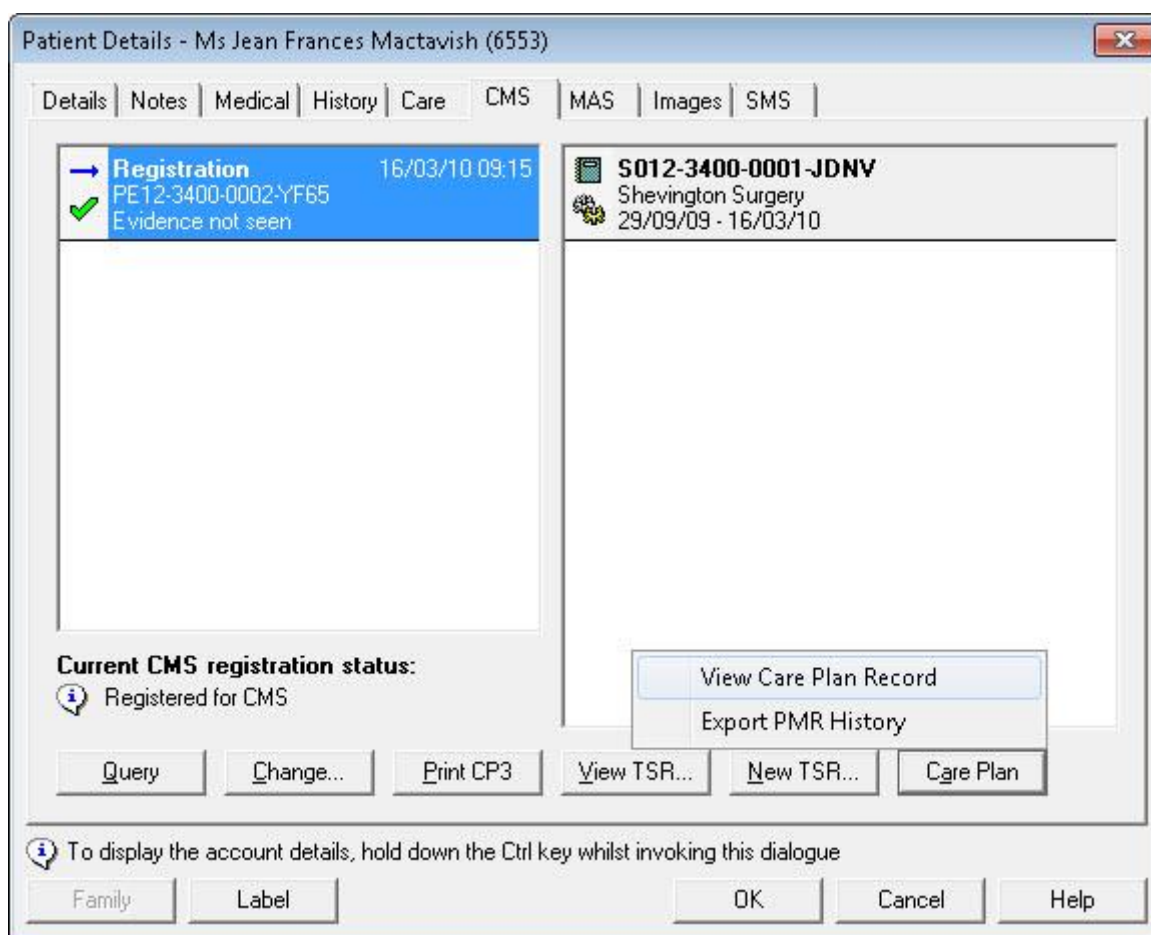


Figure 12-2: Positive Solution's Analyst PMR system

## 12.2 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 12-3) 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 

Search Protocols Reports Change password Help Logout

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 12-3: 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.

## 12.3 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: MHddmmyxxxx.xml where ddmmyxxxx 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.

### 12.3.1 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 12-4)

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Mon, Mar 16, 2015 08:06

Pharmacy Care Record 

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[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

**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 12-4: 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

Browse...

Upload

[return to Patient Medications page](#)

[return to Patient Home Page](#)

Figure 12-5: 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 12-5, 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

[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

### Import Medications

Choose file

[return to Patient Medications page](#)

[return to Patient Home Page](#)

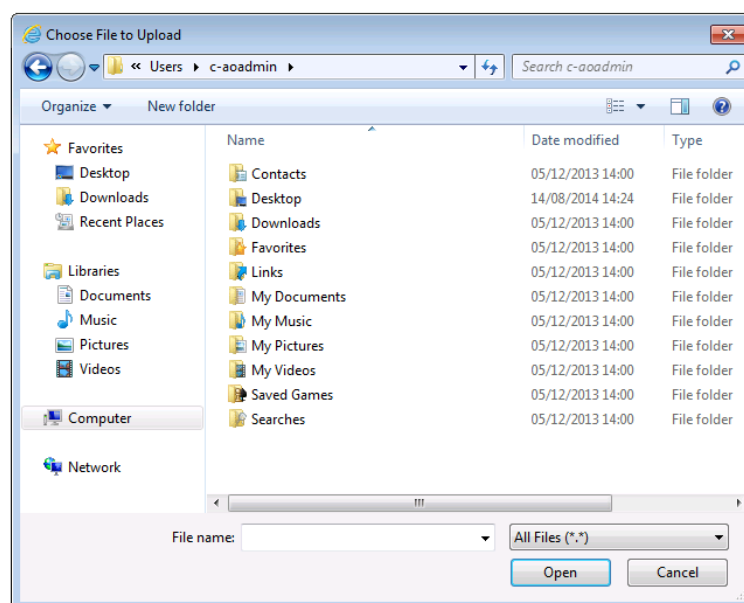


Figure 12-6: PCR medication import page and standard windows file open dialog

If the box is 'greyed out' preventing you from entering information, click the 'Browse' button shown in Figure 12-6. 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 12-6 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 12-7 will be displayed.

Pharmacy: 1234 - Pharmacy 1234  
 User: Testuser - Jane Smith  
 Last login: Mon, Mar 16, 2015 08:06

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

<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)?

[return to Patient Medications page](#)

[return to Patient Home Page](#)

**Figure 12-7: 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 12-8 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

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**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>
<b>Quantity</b> <b>Direction</b> <b>Dispensed on</b> <b>Imported</b>						
28	Take One Daily	24-Jun-2009	True			
28	Take One Daily	26-May-2009	True			
28	Take One Daily	29-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 caplets (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>
> Levofloxacin Tabs 50MICROGRAMS	26-May-2009	AMS		13-Apr-2010	1234567	True <a href="#">View</a>
<b>Quantity</b> <b>Direction</b> <b>Dispensed on</b> <b>Imported</b>						
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 caplets (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 12-8: several expanded medication lines

### 12.3.2 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 12-9 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

Figure 12-9: PCR patient medication entry/edit page – editing an imported item

### 12.3.3 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 12-10)
- Select "Create Shortcut" from the context menu

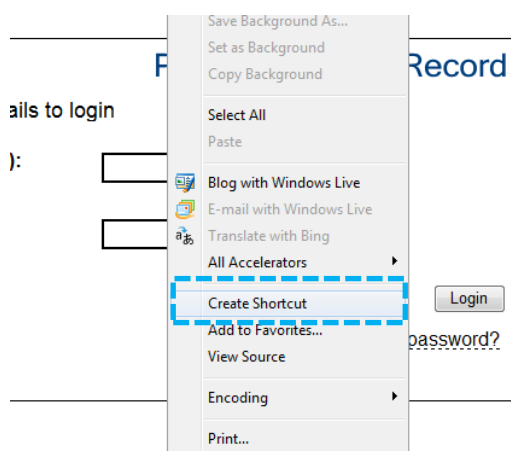


Figure 12-10:right click to "Create shortcut"

- A popup message will be displayed (Figure 12-11)

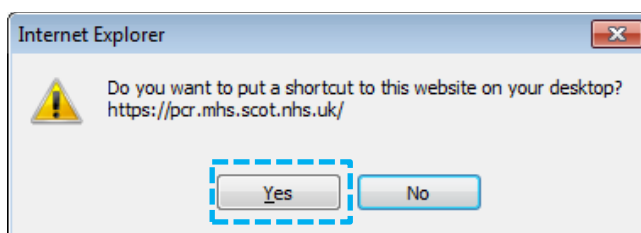


Figure 12-11: Confirm "Create shortcut"

- Select "Yes"
- A shortcut to PCR is placed on your Desktop (Figure 12-12)

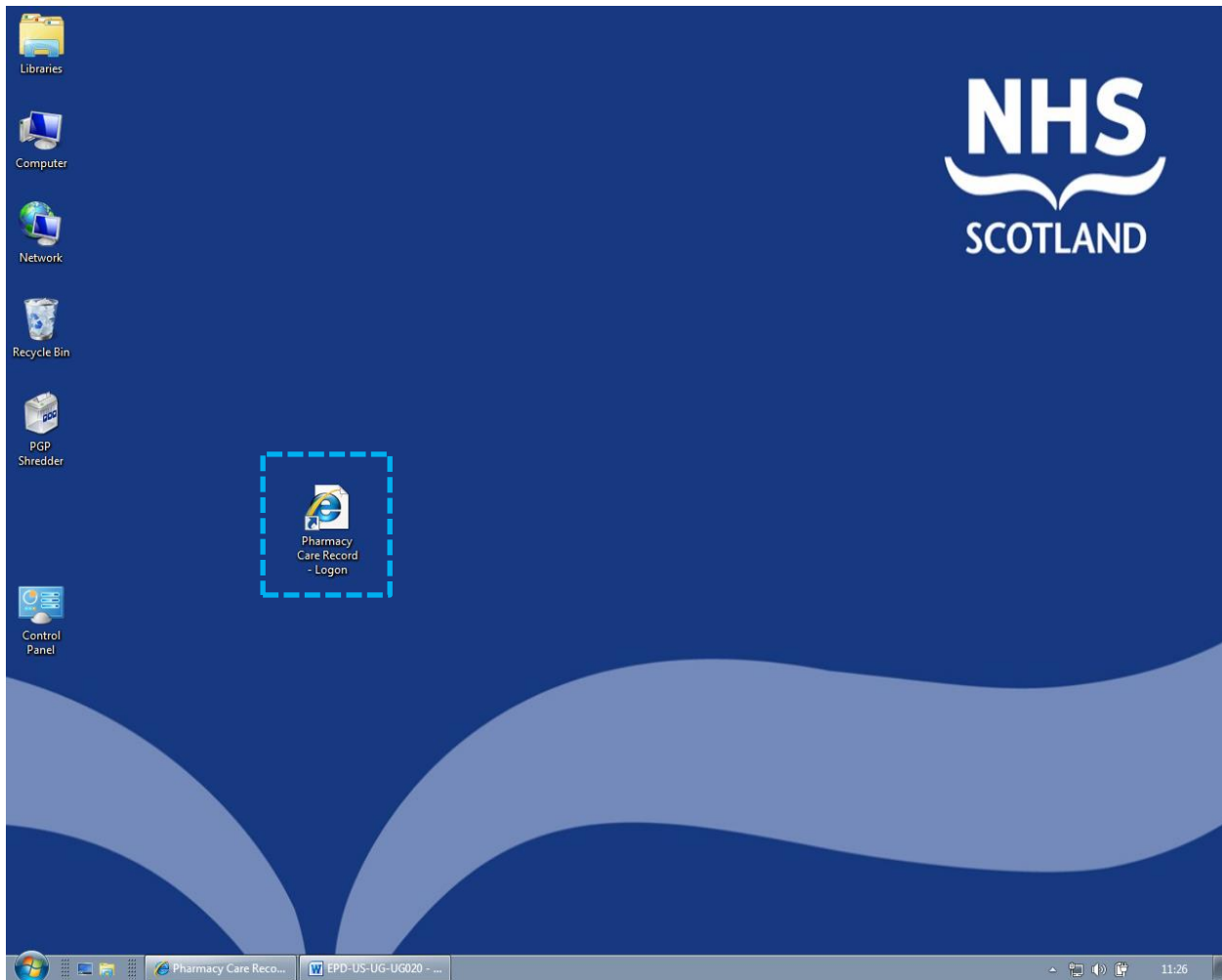


Figure 12-12: PCR Icon on Desktop

## 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 12-13).

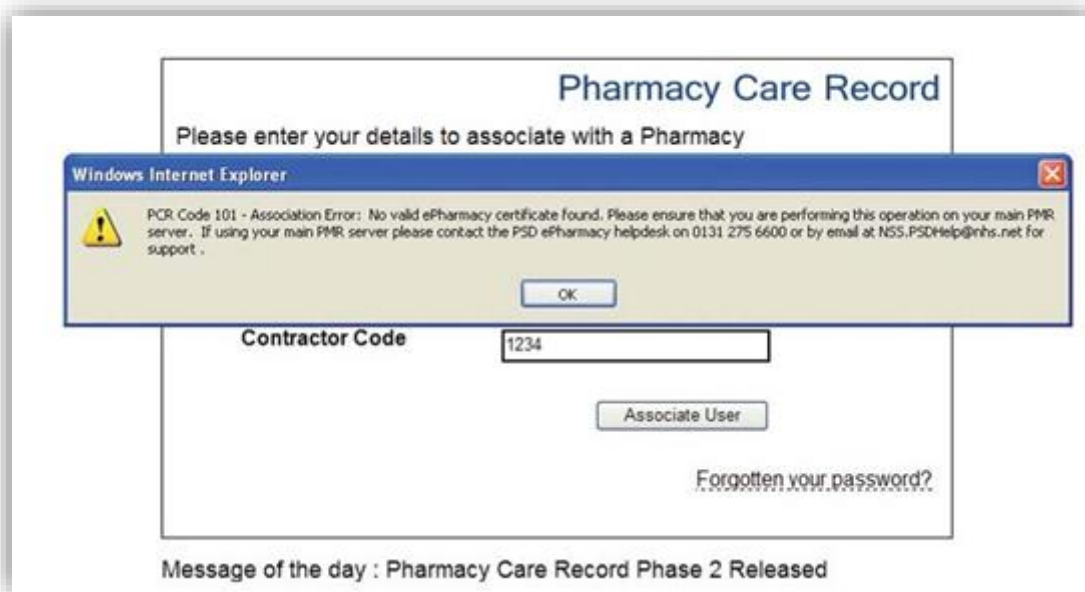


Figure 12-13: Error message if ePharmacy Certificate not present

## 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 12-13) then you may be able to resolve the issue by adding the PCR Association website to your list of trusted websites.



Figure 12-14: 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 12-15)

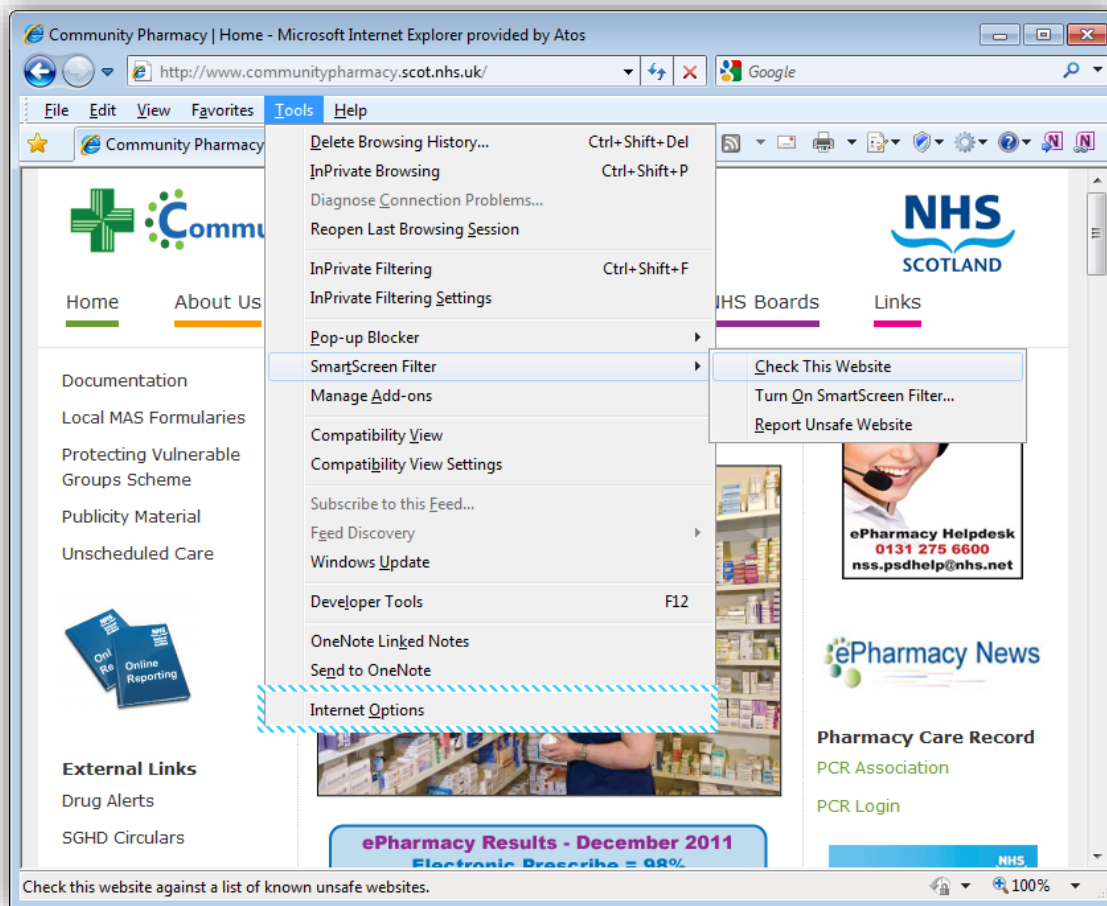


Figure 12-15: Tools > Internet Options (IE8)

- Select the security tab and then select the “Trusted sites” zone (Figure 12-16).

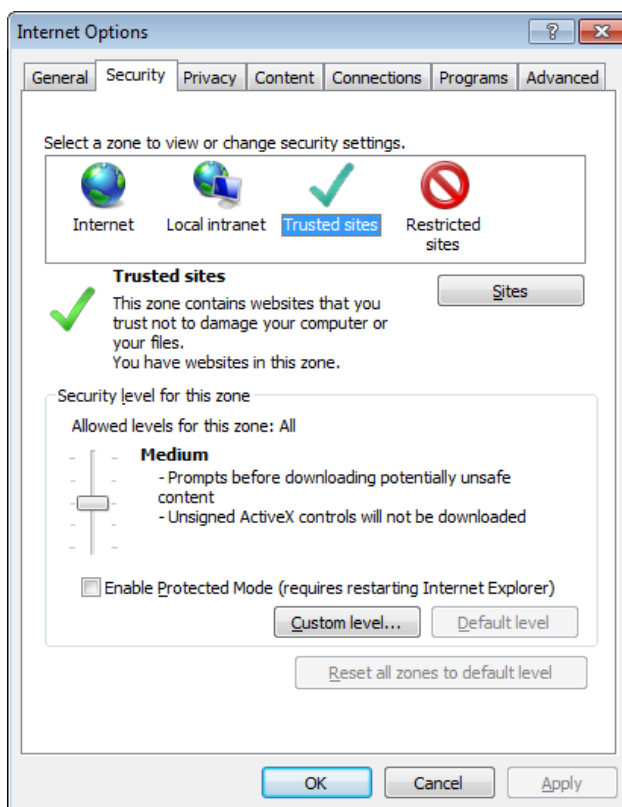


Figure 12-16: Trusted sites zone on security tab

- Click the “Sites” button, the “Trusted” sites dialogue is shown (Figure 12-17)



Figure 12-17: 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 12-17).
- 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> 555555555
<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	<i>Takes ACE inhibitor and diuretic at tea-time Sub therapeutic dosage of paracetamol</i>
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	<i>Night time diuresis as a result of timing of diuretic</i>
Problems with concordance?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	<i>Doesn't always take her diuretic therapy due to concerns about diuresis.  Finds it difficult to press out paracetamol tablets from blister pack</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 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**

<b>General Health:</b> Smoker
<b>Medical conditions:</b> Hypertension, Osteoarthritis
<b>Allergies and Sensitivities:</b> None known

**Patient Factors: Dispositions**

<b>Compromised oral route of administration</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Physical Impairment</b>	<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>
<b>Visual Impairment</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

**Patient Factors: Organ Function**

<b>Hepatic function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Renal function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Lung function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Immune status:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

**Patient Factors: Maternal**

<b>Pregnant:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Breastfeeding:</b>	<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:**  Low Priority  
 Medium Priority  
 High Priority

## 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	
<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	<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**

<b>Compromised oral route of administration</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Physical Impairment</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Visual Impairment</b>	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	<i>Cataracts - awaiting cataract operation</i>

**Patient Factors: Organ Function**

<b>Hepatic function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Renal function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Lung function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Immune status:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

**Patient Factors: Maternal**

<b>Pregnant:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Breastfeeding:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

**Pharmaceutical Care Plan Priority**

<p><b>PCP Priority:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Low Priority</li> <li><input checked="" type="radio"/> Medium Priority</li> <li><input type="radio"/> High Priority</li> </ul>	<p><i>Improve patient's understanding of their medicines to prevent any potential compliance problems</i></p>
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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 patients 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**

<b>Compromised oral route of administration</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Physical Impairment</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Visual Impairment</b>	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

**Patient Factors: Organ Function**

<b>Hepatic function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Renal function:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
<b>Lung function:</b>	<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>
<b>Immune status:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

**Patient Factors: Maternal**

<b>Pregnant:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
<b>Breastfeeding:</b>	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

**Pharmaceutical Care Plan Priority**

<p><b>PCP Priority:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Low Priority</li> <li><input type="radio"/> Medium Priority</li> <li><input checked="" type="radio"/> High Priority</li> </ul>	<p><i>Improve inhaler technique.</i></p> <p><i>Provide smoking cessation advice and support.</i></p>
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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