

# Pharmacy Care Record

User Guide

for version 8



# Document information

## Document control

Document Ref.: UG020  
File Name: PCR\_User\_Guide.pdf  
File Version Number: 5 Final  
File Version Date: 29/10/2013

## Acknowledgements

The hard work and effort of all contributors to this User Guide is gratefully acknowledged.

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

## Authors

ePharmacy Delivery Team

## Contributors

Dr Scott Cunningham, School of Pharmacy & Life Sciences, RGU; Professor Alison Strath, Principal Pharmaceutical Officer, Scottish Government.; Dr Ailsa Power, Assistant Director, NES Pharmacy Paul Gunnion, Greenhead Editorial and Publishing Service Ltd. Valerie Inglis, Administrator, NES Pharmacy

## Disclaimer

*While every precaution has been taken in the preparation of this User Guide, neither NHS Scotland nor external contributors shall have any liability to any person or entity with respect to liability, loss or damage caused or alleged to be caused directly or indirectly by the information therein.*

© NHS Scotland 2013. You can copy or reproduce the information in this document for use within NHS Scotland and for non-commercial educational purposes. Use of this document for commercial purposes is permitted only with the written permission of NHS Scotland.

# Contents

<b>Introduction</b>	<b>4</b>
<b>1 Access and security</b>	<b>8</b>
1.1 Access and security principles	8
1.2 User ID and password	8
1.3 Associating with a community pharmacy	10
1.5 PCR Login process	14
1.6 Technical environment	16
1.7 Maintain reset password questions	16
1.9 Change or remove questions	19
1.10 Reset password	20
1.11 Expiring Password Warning	23
1.12 Last login date and time	23
<b>2 High-level menu functions</b>	<b>24</b>
2.1 Overview	24
2.2 Menu functions	24
<b>3 Search for and create patient records</b>	<b>30</b>
3.1 Overview	30
3.3 Using the search function	31
3.5 Manually create a patient record	33
3.6 Edit patient details	36
<b>4 Pharmaceutical care plans</b>	<b>37</b>
4.1 Overview	37
4.2 Patient profile	38
4.3 Pharmaceutical care risk assessment	45
4.4 Pharmaceutical care issues, outcomes and actions	48
4.5 Medication	53
<b>5 High risk medicine care risk assessments</b>	<b>55</b>
5.1 Overview	55
5.3 Start a HRM Care Risk Assessment	56
5.4 Create a high risk medicine care risk assessment	58
5.5 High risk medicine care risk assessment assessment summary page	63
5.6 Create associated care issue and care issue outcome using prepopulated text	66
5.8 Create associated care issue / care issue outcome using the "Add" link	68
5.9 Set the status of a high risk medicine care risk assessment to "Completed"	70
5.10 Access existing high risk medicine care risk assessments from the patient home page	71
<b>6 New medicine interventions</b>	<b>73</b>
6.1 Overview	73
6.2 Start a new medicine intervention	73
6.4 Enter medication details	74
6.5 Enter answers to initial intervention questions	75
6.6 New medicines interventions review page	76
6.7 Schedule a follow up intervention	77
6.8 Complete a follow up intervention	80
6.9 Add care issue / care issue outcome	84
6.10 Complete a new medicine intervention record	87
6.11 Summary of new medicine interventions for an individual patient	89
<b>7 Gluten-free support tool assessment</b>	<b>90</b>

7.1	Overview	90
7.2	Start a Gluten-free Support Tool Assessment	91
7.3	Create a Gluten-free support tool assessment	92
7.4	Gluten-free support tool assessment summary page	96
7.5	Create associated care issue and Care Issue Outcomes using prepopulated text	97
7.6	Create associated care issue and care issue outcome using the "Add" link	98
7.8	Set the status of a Gluten-free support tool assessment to "Completed"	101
7.9	Access existing Gluten-free support tool assessments from the Patient Home page	102
<b>8</b>	<b>Reports</b>	<b>104</b>
8.1	Overview	104
8.2	Outstanding care issues report	106
8.3	PCR Patient Report for Associated Pharmacy	108
8.4	New Medicine intervention reports	110
8.5	Complex dispensing patient reports	112
8.6	Gluten-free reports	113
8.7	High risk medicine assessments reports	115
<b>9</b>	<b>PMR interface to PCR</b>	<b>117</b>
9.1	Overview	117
9.2	Patient interface	118
9.3	Medication history transfer	119
	<b>Appendix A: Error Messages</b>	<b>125</b>
	<b>Appendix B: Create PCR shortcut on desktop</b>	<b>128</b>
	<b>Appendix C: PCR association - Common issues</b>	<b>130</b>
	Using PCR association function from a computer without an ePharmacy Certificate	130
	Unable to access the PCR association function	131
	<b>Appendix D: Example test patients</b>	<b>135</b>
	Test patient 1:	135
	Test patient 2:	136
	Test patient 3:	137
	<b>Appendix E: Patient Test Cases</b>	<b>138</b>
	Test Patient 1: Ms Sally Shortbread	138
	Test Patient 2: Mr Bertie Biscuit	142
	Test Patient 3: Mr Colin Cracker	146

## Introduction

### The Pharmacy Care Record (PCR)

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

In summary, a registered PCR user can create and maintain patient records that contain information that relates to:

- Patient identification information
- Pharmaceutical care plans
- Care issues and care issue outcomes
- High risk medicine care risk assessments
- New medicine interventions
- Support tool assessments

This functionality is further supported by:

- A rigorous access and security model
- The capability to synchronise patient medication history and patient demographic information between the PMR and PCR.
- Access to CMS disease protocols
- Management reports
- External link to the "Yellow Card" web portal

### About this user guide for PCR version 8

This user guide has been updated to include new features introduced for PCR version 8. It also combines the original NES PCR user guide with the Phase 3, 4 and 5 addenda which were issued by the ePharmacy delivery team to detail new functionality within PCR. New functionality in PCR version 8 includes:

- Date picker control on all selectable date fields
- Link to PCR after successful association
- Warfarin high risk medicine care risk assessment
- Gluten-free Patient Profile information
- Gluten-free Support Tool Assessment
- Gluten-free Support Tool Assessment Reports

This user guide also complements the NES Pharmacy Chronic Medication Service (CMS) Implementation Resource Pack that all community pharmacies in Scotland should have access to. Further 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.

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

## Creating test patients

You can create three test patients to assist with PCR training. The test patients must be given one of the following CHI numbers: '555555555', '777777777' or '999999999'.

Every pharmacy can create test patients with these CHI numbers and, because of the association process, users will only see the test patients for the pharmacy where they are currently associated.

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

It is important to ensure that any test patients bear no resemblance to real patients. To assist with this, suggested patient names have been provided in "Appendix D: Example test patients". You can then use your pharmacy address to complete the demographic data for each patient.

You should not add these patients to your PMR as the PMR to PCR interface will not work with the test CHI numbers.

## User guide structure

### Section 1: Access and security

*Understand the security arrangements for PCR and Use the 'associate' function to determine your pharmacy and login to PCR.*

### Section 2: 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.*

### Section 3: Search for and create patient records

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

### Section 4: Pharmaceutical care plans

*Create and maintain pharmaceutical care plans for patients including the creation and maintenance of patient profile information, and care issues and care issue outcomes.*

### Section 5: 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.*

### Section 6: New medicine interventions

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

### Section 7: Gluten-free Support Tool Assessment

*Create and maintain Gluten-free Support Tool Assessment and associated care issues and care issue outcomes.*

### Section 8: Reports

*This section includes details of the outstanding care issues report, patient summary report, new medicine interventions reports, diagnosed Coeliac patient report, and High risk medicine assessments reports*

### Section 9: 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 id one doesn't exist.*

### Appendix C: PCR association – common issues

*Troubleshooting 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 familiarise yourself with PCR.*

# 1 Access and security

## 1.1 Access and security principles

PCR security and access protocols are built around 5 key principles:

- Access is only allowed from Scottish community pharmacies via an independent community pharmacy N3 connection or an authorised corporate network with an approved N3 gateway.
- Access to PCR is limited to practising pharmacists who work in Scottish community pharmacies.
- All pharmacists who practice in Scottish community pharmacies have an individual User ID and password for access to PCR.
- A pharmacist can only access PCR records for the patients of the community pharmacy where they are currently working.
- All access attempts to PCR and updates / viewing of patient records are audited.

## 1.2 User ID and password

All practising pharmacists in Scotland who work in a community pharmacy and require access to PCR will need a PCR User ID and password.

Health boards have responsibility to identify PCR users and to distribute the User IDs and passwords.

### 1.2.1 Determining your User ID

Your user ID varies based on when you were initially provided with access to PCR:

- If you received your PCR User ID prior to 5th October 2010 your PCR User ID is your RPSGB membership number.
- If you received your PCR User ID from 1st February 2011 your PCR User ID is your GPhC registration number.
- If you received your PCR User ID after 5th October 2010 but before 1st February 2011 your PCR User ID is one of either your GPhC registration number, or your RPSGB membership number.

### 1.2.2 Change password on initial login

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

Figure 1-1: Update password page

**Note:** A users 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

Change password).

**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 – **0131 275 6600**.

## 1.3 Associating with a community pharmacy

It is a fundamental requirement of the PCR application that 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 although some large multiple pharmacies may allow the association process from any computer in the pharmacy. With the exception of Lloyds pharmacy, the main server computer is usually the one where the ePharmacy Certificate Management Application is installed and the ePharmacy Client Certificate resides. 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.

### 1.3.1 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)

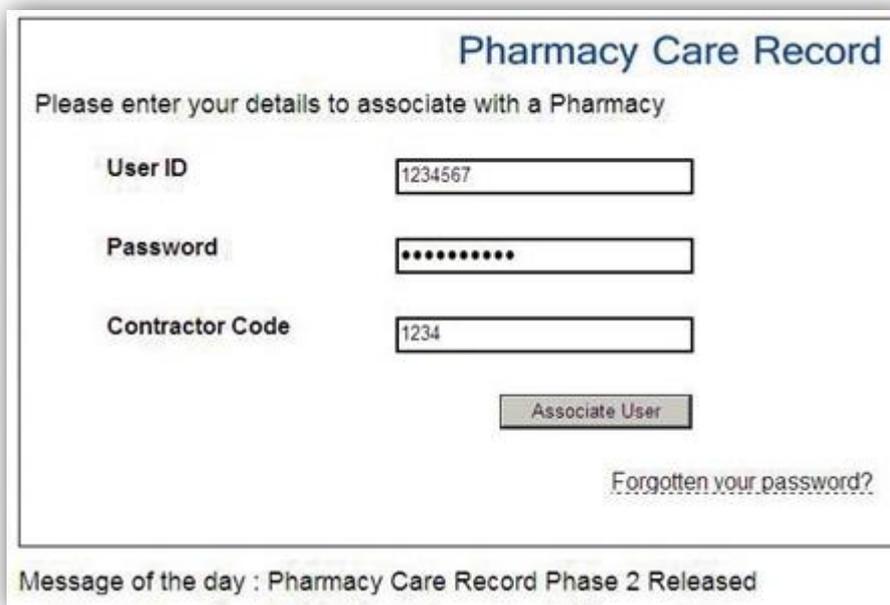


Figure 1-3: Associate User

**Step 3: Accept second security alert**

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

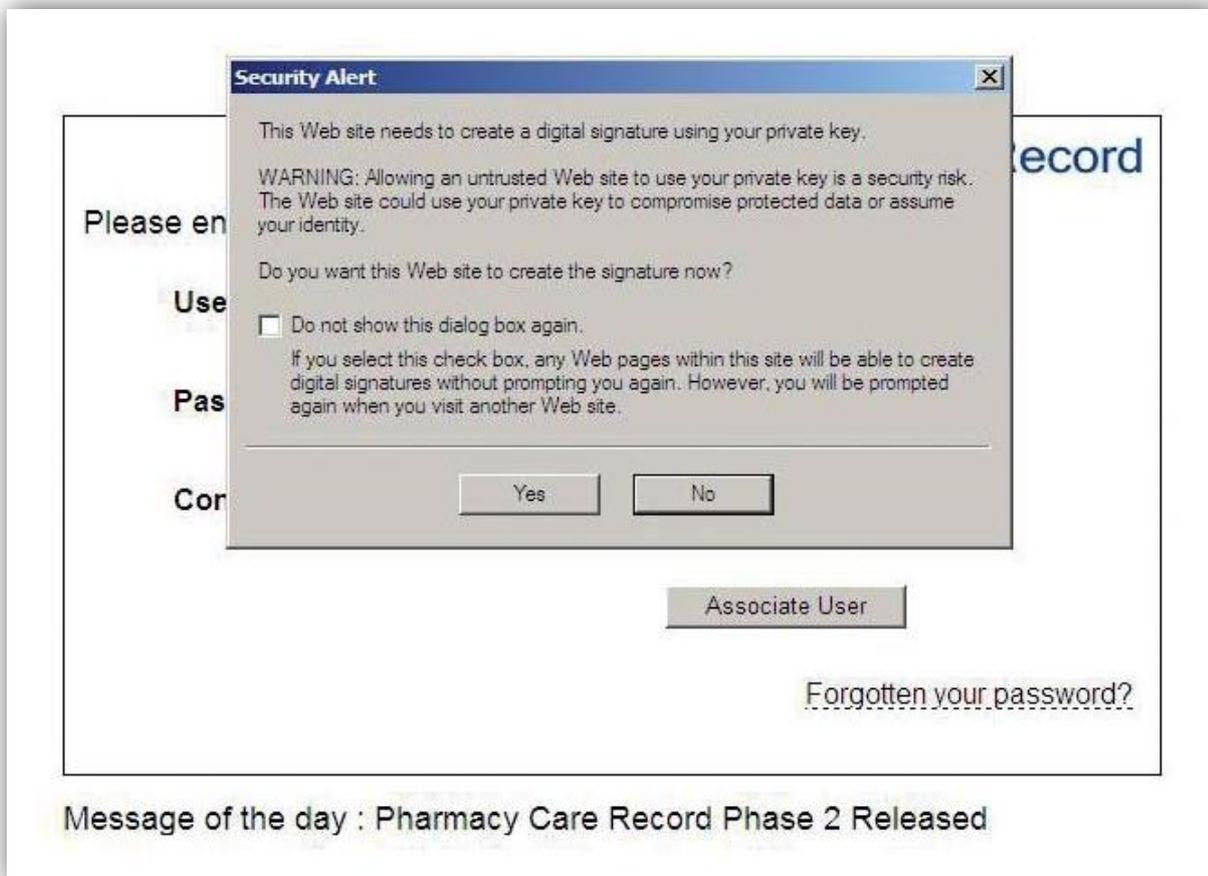


Figure 1-4: Association final security certificate

**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).

## Pharmacy Care Record

Please enter your details to associate with a Pharmacy

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

**Password**

**Show password**

**Contractor Code**

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

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

*Authorised Users Only*

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

Figure 1-5: Association successful

At this stage, only association with a pharmacy is complete. A further step is required to login to the main PCR application to access patient records.

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

### 1.3.2 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 2.2.4, Change password](#).

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:

- Navigate 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 "Search criteria" screen (Figure 1-7)

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](#)

**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 1-7: "Search criteria" page

**Note:**

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

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

**1.5.3 Common information and functions on all PCR pages**

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

The high level menu is displayed below the heading and is also displayed on each page. The high level menu allows you to quickly move between the different functions within PCR. The High-level menu functions are detailed in Section 2 of this guide.

**1.5.4 Login failure**

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



**Pharmacy Care Record**

Please enter your details to login

**User ID:**

**Password:**

[Forgotten your password?](#)

**Your user credentials are not currently associated with a Pharmacy**

Figure 1-8: Login failure example

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

## 1.5.5 Alternative login scenarios

### First time Login

If you are logging in to PCR for the first time the change password screen will display instead of the "Search criteria" screen. 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.

## 1.6 Technical environment

### 1.6.1 Browser compatibility

PCR is a web application and has been tested for compatibility with Microsoft Internet Explorer 6, 7 and 8. The main PCR application is available from any computer within a Scottish community pharmacy that is connected to the N3 network (either directly or indirectly via an approved corporate network).

### 1.6.2 Saving changes in PCR

As PCR is a web application, changes made must be saved by clicking the 'Save' (or equivalent) button on each page. If an Internet Explorer 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 1-9)

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 profile

[Manage my profile](#)  
[Manage my reset password questions](#)  
[Change password](#)

Figure 1-9: "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 1-10)

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	Answered	Delete
Question 1		Delete
Question 2		Delete
Question 3		Delete
Question 4	01-Dec-2009	Delete
Question 5	01-Dec-2009	Delete

Answered Questions: 5, Required Questions: 5

Figure 1-10: "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 1-11)

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 1-11: 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).

## 1.9 Change or remove questions

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

### To change or remove questions:

- Within the Manage Reset Password questions page, click Delete on the question you want to change or remove (Figure 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 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 1-12: Delete reset password question

## 1.10 Reset password

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

### Step 1 - Click "forgotten your password?" link:

- Select the "Forgotten your password?" link on the PCRUA or PCR login screen (Figure 1-13)

Figure 1-13 "forgotten your password" link

### Step 2 - Enter user details:

- Enter User ID and click the "Start" button (Figure 1-14)

Figure 1-14: 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 1-15)

**Note:** Selecting the "Yes" button will remove an existing association and mandate the need to re-associate (See section 1.3).

The screenshot shows a web interface titled "Pharmacy Care Record". Below the title, it says "Start the reset password process". There is a text input field for "User ID (RPSGB / GPhC)" containing the value "1234567". Below the input field is a link: "(for further information [click here](#))". To the right of 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 dialog are two buttons: "Yes" and "No". The "Yes" button is highlighted with a dashed blue border.

Figure 1-15: 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 1-16).

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

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

Figure 1-16: 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 1-17)



The screenshot shows a web form titled "Pharmacy Care Record" with a subtitle "Set password for testuser". There are two text input fields: "New password:" and "Confirm password:". To the right of the "Confirm password:" field is a button labeled "Set Password". The button is highlighted with a dashed blue border.

Figure 1-17: 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.

## 1.11 Expiring Password Warning

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

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

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

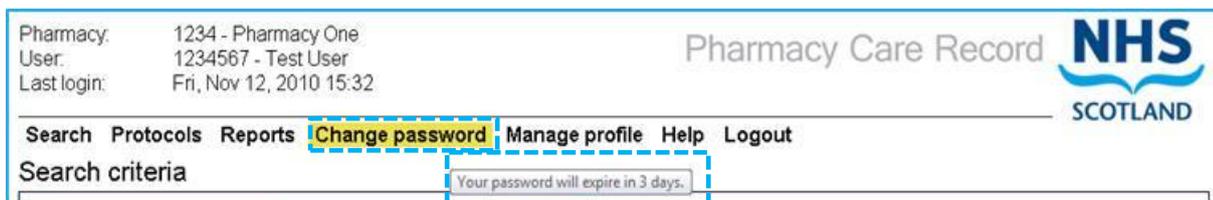


Figure 1-18: Expiring password warning

## 1.12 Last login date and time

For security, the last login date and time is displayed in PCR (Figure 1-19)



Figure 1-19 Last login date and time

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

## 2 High-level menu functions

### 2.1 Overview

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

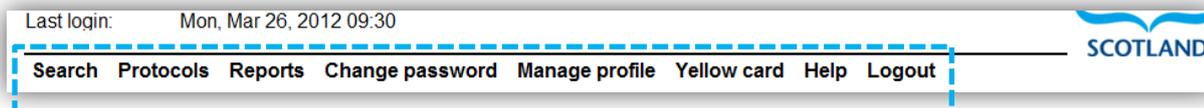


Figure 2-1: PCR high level menu

**Note:** Remember PCR is a web-based application and clicking on any high-level menu option will immediately open the relevant PCR page. Any changes you have made in a previous screen will be lost if you have not saved updates.

### 2.2 Menu functions

#### 2.2.1 Search

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

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

Pharmacy Care Record 

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

#### Search criteria

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

#### Search results

Figure 2-2: Search criteria page

Full guidance on using the search function is covered in section 3, Search for and create patient records.

### 2.2.3 CMS disease protocols

Selecting the "Protocols" menu will display a list of all CMS disease protocols (Figure 2-3: CMS Disease Protocols).

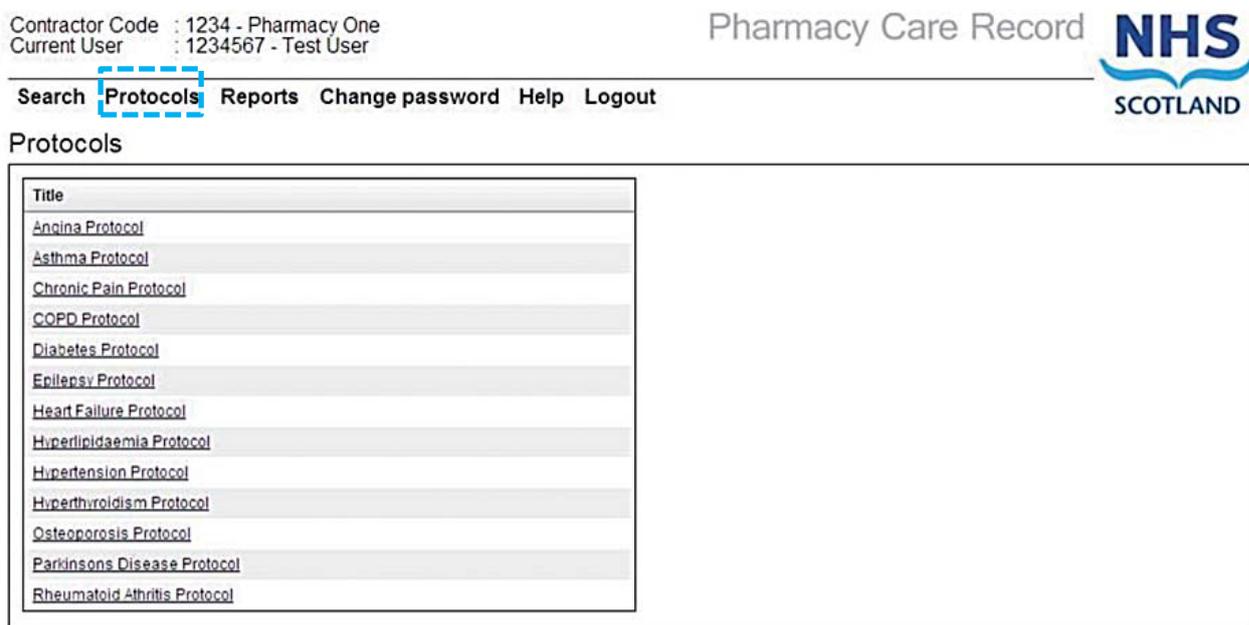


Figure 2-3: CMS Disease Protocols list

Protocols are displayed in alphabetical order.

#### To view a CMS disease protocol:

- Select a document link from the list
- A PDF document for the selected disease protocol will be launched in [Adobe Reader](#).

**Note:** Right clicking on a Protocol document link and choosing 'open in new tab' or 'open in a new window' may be preferable so that the current PCR page remains open.

### 2.2.4 Reports

Select the "Reports" menu to view a list of reports available to the Pharmacy. Reports are explained in section 7 of this guide.

## 2.2.6 Change password

Selecting this function will display the change password page (Figure 2-4).

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

Pharmacy Care Record 

---

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

**Change password**

Current password

New password

Confirm password

Figure 2-4: Change password page

The change password function can be used at any time. This function is explained in section 2.2.5.

## 2.2.7 Manage profile

Use this function to access links to manage details relating to the user’s profile, password reset questions and also a link to the change password functionality (Figure 2-5).

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

Pharmacy Care Record 

---

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

**Manage profile**

[Manage my profile](#)

[Manage my reset password questions](#)

[Change password](#)

Figure 2-5: 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 2-6)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 3, 2012 11:17

Pharmacy Care Record 

---

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

**Manage profile**

[Manage my profile](#)

[Manage my reset password questions](#)

[Change password](#)

Figure 2-6: Manage profile options

**Step 2 - edit profile details:**

- The Pharmacist Profile page will now be displayed (Figure 2-7)

*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 2-7: 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
- Change password, section 2.2.5

### 2.2.9 Yellow Card

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

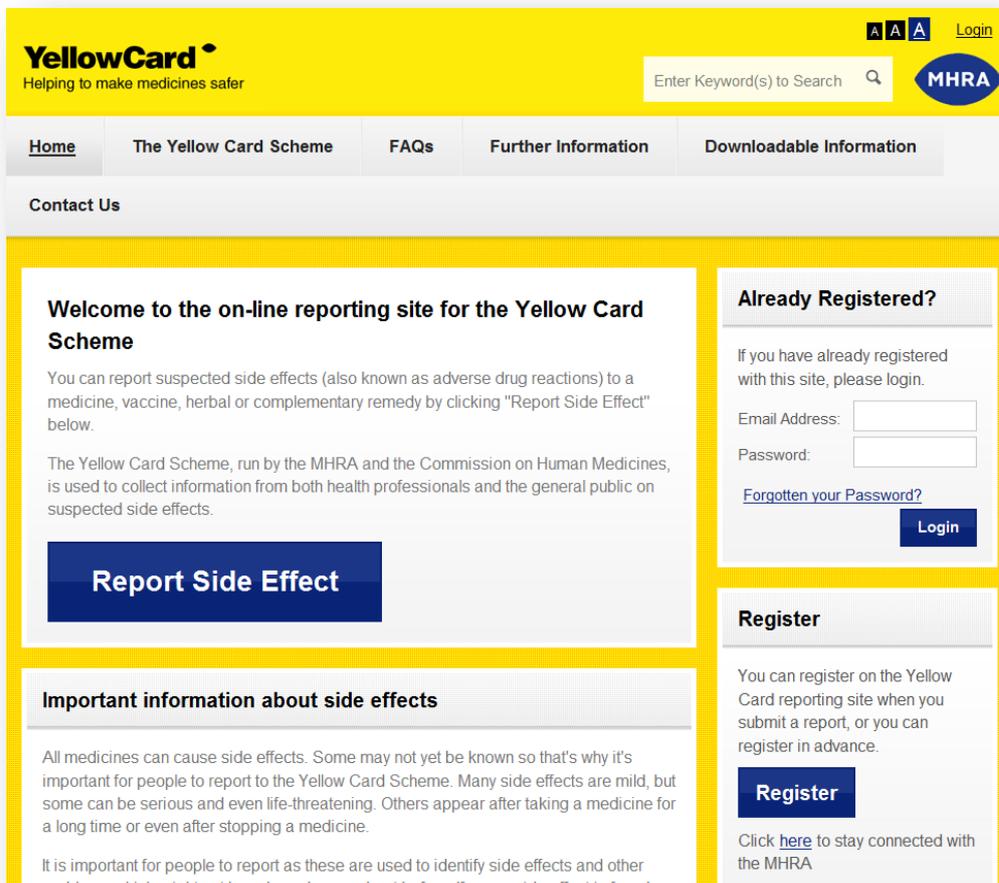


Figure 2-8: Yellow Card website

### 2.2.10 Help

Select this option to view help related information that includes support contact details and a link to this user guide (Figure 2-9).

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Mar 26, 2012 09:30

Pharmacy Care Record 

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

#### Help

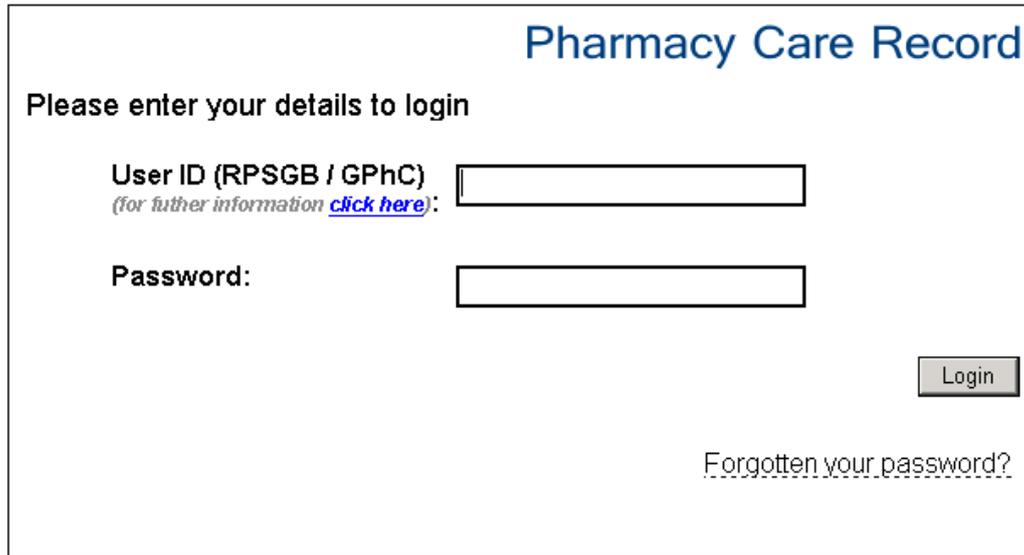
Contact Details	Please contact us at: Tel: 0131 275 6600 or email us : <a href="mailto:nss.psdhelp@nhs.net">nss.psdhelp@nhs.net</a>
User Guide	<a href="#">View Guide</a> This PCR User Guide is in a format called PDF. If you cannot open the help guide please contact either your pharmacy system supplier 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 2-9: PCR help information with link to user guide

*The help page also includes information about installing Adobe Reader.*

## 2.2.12 Logout

Selecting the logout option from the high level menu will logout the current user and display the login page (Figure 2-10)



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 2-10: Login page displayed after logout has been selected

## 3 Search for and create patient records

### 3.1 Overview

The search criteria page (Figure 3-1) is automatically displayed when you have successfully logged into PCR - if not invoked from within the PMR application. The Search criteria page can also be displayed at any time by clicking on the 'Search' link on the high-level menu.

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

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

Other identifying information such as given name (first name) or Post Code can also be entered to limit the number of records returned. Searches are not case sensitive.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 12:36



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

#### Search criteria

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

#### Search results

Figure 3-1: Search criteria page

**Note:** The scope of any search is limited to the patients who have a pharmacy care record at the community pharmacy where you are currently associated. If a patient has a PCR record associated with another pharmacy you will not see their record.

You can create a new record for the patient which will then be uniquely linked to the pharmacy where you are associated.

### 3.3 Using the search function

**To search for a patient:**

- Type the search criteria into the form and click the "Search" button

**If the search is successful:**

- A list of records that match your criteria will be displayed (Figure 3-2)

*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 One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 12:36



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

**Search criteria**

Family name	<input type="text" value="s"/>
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**

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 Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	<a href="#">View</a>

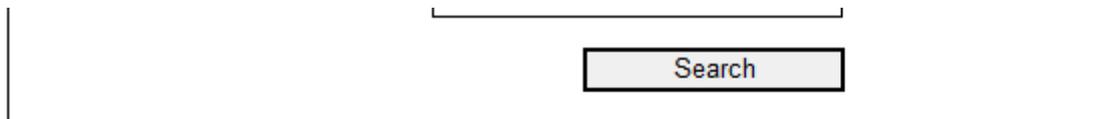
Figure 3-2: Search results list

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 3-3)

User options:

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



### Search results

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

Figure 3-3: No matching patient records found

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Mon, Oct 14, 2013 12:36



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

#### Search criteria

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

#### Search results

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

Figure 3-4: No matching patient records found

### 3.5 Manually create a patient record

The option to create a new patient record is only available via the “click here” link displayed following a patient search.

The option to manually create a patient record in PCR is available if:

- You have completed a patient search and no records have been found (Figure 3-4)
- You have completed a patient search and the patient you want is not listed (Figure 3-4)

**Note:** [Section 9 of this User Guide details the process for creating a patient record using the patient interface functionality between your PMR application and PCR.]

**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 3-5)
- Enter the patient details
- Select the “Save” button\*
- [The patient home screen will be displayed. 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.

\*Alternatively select “Cancel” button. No data will be saved and the “Search criteria” page will be displayed.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 12:36

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

**Patient Details**

<b>Patient Demographics</b>		<small>* Means a field requires data</small>	
CHI	<input type="text"/> *	Title	<input type="text"/>
Given name	<input type="text"/> *	Family name	McDonald <input type="text"/> *
Preferred name	<input type="text"/>	Gender	Male <input type="text"/>
Date of birth	<input type="text"/>  *	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"/>		

Figure 3-5: Patient details page

- Having clicked "Save" the patient home will be displayed (Figure 3-6).

**MCDONALD, James** Born 17-Oct-1772 (240y) Gender Male CHI No. 7777777777  
Patient Details Last Modified On 14-Oct-2013 By Testuser

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-Oct-2013 by Testuser

Review/Edit

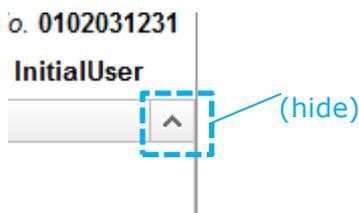
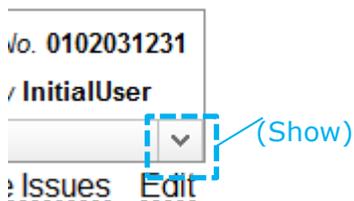
Figure 3-6: Patient Home page

**Note:** On most screen resolutions you will require to "scroll up/down" to see all sections of this page.

**To show/hide patient address and contact details:**

- Select the arrow on the right hand side of the patient home page (Figure 3-7)

STANDARD



Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Apr 12, 2012 11:07

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

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

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

[Pharmaceutical Care Plan](#) [High Risk Medicine Assessments](#) [New Medicine Interventions](#)

**Patient Profile** [Show less detail ^](#)

<b>Named Pharmacist</b>	Pharmacist A
<b>Additional Information</b>	Pharmacist A Additional Information

Pharmacy: 1234 - Pharmacy One  
User: Testuser - Jane Smith  
Last login: Thu, Apr 12, 2012 11:07

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

<b>SMITH, Johnathan (Mr)</b>	Born 03-Feb-2001 (11y 2m) Gender Male CHI No. 0102031231
Preferred name John	Patient Details Last Modified On 03-Dec-2008 By InitialUser
Address 3 Appleton Parkway, Livingston, West Lothian, UK, EH54 7EZ	Phone and email 01506 000-000
Usual address 3 Appleton Parkway Livingston West Lothian UK EH54 7EZ	Home 01506 000-000 Work Mobile 0777 000-000 Email JohnSmith@home.com

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

[Pharmaceutical Care Plan](#) [High Risk Medicine Assessments](#) [New Medicine Interventions](#)

**Patient Profile** [Show less detail ^](#)

Figure 3-7: Show/hide patient address and contact details

### 3.6 Edit patient details

**To edit patient details (Demographics):**

- Select the "Edit" link located at the top right of the patient profile on the patient home screen (Figure 3-8)

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

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

CHI <input style="border: 1px solid #ccc;" type="text" value="0102031231"/> *	Title <input style="border: 1px solid #ccc;" type="text" value="Mr"/>
Given name <input style="border: 1px solid #ccc;" type="text" value="Johnathan"/> *	Family name <input style="border: 1px solid #ccc;" type="text" value="Smith"/> *
Preferred name <input style="border: 1px solid #ccc;" type="text" value="John"/>	Gender <input style="border: 1px solid #ccc;" type="text" value="Male"/>
Date of birth <input style="border: 1px solid #ccc;" type="text" value="03-02-2001"/> *	Patient Deceased <input type="checkbox"/>
e.g. 01-05-2010 for the 1st of May 2010	

<b>Patient Address</b>	<b>Contact Details</b>
Address 1 <input style="border: 1px solid #ccc;" type="text" value="3 Appleton Parkway"/>	Home phone number <input style="border: 1px solid #ccc;" type="text" value="01506 000-000"/>
Address 2 <input style="border: 1px solid #ccc;" type="text" value="Livingston"/>	Mobile phone number <input style="border: 1px solid #ccc;" type="text" value="0777 000-000"/>
Address 3 <input style="border: 1px solid #ccc;" type="text" value="West Lothian"/>	Work phone number <input style="border: 1px solid #ccc;" type="text"/>
Address 4 <input style="border: 1px solid #ccc;" type="text" value="UK"/>	Email address <input style="border: 1px solid #ccc;" type="text" value="JohnSmith@home.com"/>
Address 5 <input style="border: 1px solid #ccc;" type="text"/>	
Postcode <input style="border: 1px solid #ccc;" type="text" value="EH54 7EZ"/>	

Figure 3-8: Patient Details

This will display the patient details screen

- Edit the details as required and click the "Save" button\*

**Note:** Mandatory information is highlighted with "\*".

\*Selecting the "Cancel" button will display the patient home – no details will be changed.

## 4 Pharmaceutical care plans

### 4.1 Overview

The patient home page 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 3) a "blank" PCP is automatically created.

There are four main sections in the PCP:

- Patient Profile
- Medication Profile (otherwise referred to as a Pharmaceutical Care Risk Assessment)
- Pharmaceutical Care Issues, Care Issue Outcomes and Actions
- Medication History

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.

## 4.2 Patient profile

The patient profile section of the patient home page (Figure 4-1) is used to record specific information about a patient’s health.

Patient Profile			
<b>Named Pharmacist</b>			
<b>Additional Information</b>			
<b>General Health</b>			
<b>Medical Conditions</b>			
<b>Allergies and Sensitivities</b>			
<b>Diagnosed coeliac (historical)</b>			Not Recorded
<b>Gluten-free diet</b>			Not Recorded
<b>Complex dispensing patient</b>			Not Recorded
<b>Dispositions</b>			
Patient has a	Compromised oral route of administration		Not Recorded
	Physical Impairment		Not Recorded
	Visual Impairment		Not Recorded
<b>Organ function</b>			
Patient has an impaired/compromised	Hepatic Function		Not Recorded
	Renal Function		Not Recorded
	Lung Function		Not Recorded
	Immune Status		Not Recorded
<b>Maternal</b>			
Patient is	Pregnant		Not Recorded
	Breast Feeding		Not Recorded
<b>Pharmaceutical Care Plan Priority</b>			<b>Not Recorded</b>
Patient Profile Last Modified: 10-Oct-2013 by Testuser			

Figure 4-1: Patient Home: Patient profile section

The patient profile is organised into the following categories that can all be edited on the same page:

### Named Pharmacist

- Name of Pharmacist responsible for Pharmaceutical Care Plan
- Additional Details (of named pharmacist)

### Patient Profile (Sub heading)

- General Health
- Medical Conditions
- Allergies and sensitivities

### Diagnosed coeliac (Historical)

### Gluten-free diet

### Complex dispensing patient

- Is the patient a complex dispensing patient?

- Complex dispensing subcategories (If signified as complex dispensing patient)

**Patient Factors**

- *Dispositions*
  - Compromised oral route of administration
  - Physical impairment
  - Visual impairment
- *Organ function*
  - Hepatic function
  - Renal function
  - Lung function
  - Immune system
- *Maternal*
  - Pregnant
  - Breast feeding
  - Notes

**Pharmaceutical Care Plan Priority**

- PCP Priority
- Notes

**Initial assessment complete**

- Initial assessment complete (checkbox)

**Named Pharmacist responsible for Pharmaceutical Care Plan**

Contains details of the pharmacist who is responsible for the patient's PCP and any specific contact details for the pharmacist.

You can enter this data as free-text and also create line breaks by using the "Enter" key.

**Patient Profile**

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

**Diagnosed Coeliac (historical)**

Superseded by "Gluten-free diet". Read only.

**Gluten-free diet**

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

- Not Recorded (*default option*)
- No

- Diagnosed coeliac
- Diagnosed coeliac and Dermatitis Herpetiformis
- Dermatitis Herpetiformis
- Undiagnosed

### Complex dispensing patient

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

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

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

Record any relevant patient factors. This can include information about impaired organ function or visual impairment – marking each of the factors as 'Yes', 'No', 'Not Applicable' or 'Not Recorded'. Again you can enter any applicable free-text information associated with each patient factor.

### Pharmaceutical Care Plan Priority (PCP)

A PCP priority can be recorded to assist with the recording of a Care Plan Priorities (Figure 4-2). Possible values for PCR Priority are:

- Not Recorded (Default value)
- Low
- Medium
- High
- Not Required

The screenshot shows a form titled "Pharmaceutical care plan priority". It contains a dropdown menu for "PCP Priority:" with "Not Recorded" selected. Below this is a "Notes" field, which is a large text area with a scrollbar. At the bottom left, there is a checkbox labeled "Initial assessment complete:" which is currently unchecked. At the bottom right, there are two buttons: "Save" and "Cancel".

Figure 4-2: 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 4-3), the patient profile edit page is displayed (Figure 4-4).

The screenshot shows a patient profile page with the following elements:

- maternal** section:
  - Patient is Pregnant: Not Applicable Detail available
  - Breast Feeding: Not Applicable Detail available
- Pharmaceutical Care Plan Priority**: Not Recorded Detail available
- Patient Profile Last Modified: 03-Dec-2008 by Initial User
- Review/Edit** link: A blue dashed box highlights this link.
- Pharmaceutical Care Risk Assessment** table:
 

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>
- Care Issues** section: Includes an **Add** link.

Figure 4-3: "Review / Edit" Patient Profile

<b>Named pharmacist responsible for pharmaceutical care plan</b>	
Name: <input style="width: 90%;" type="text" value="Pharmacist A"/>	Additional Information (e.g. contact details): <input style="width: 90%;" type="text" value="Pharmacist A Information"/>
<b>Patient profile</b>	
General health:	<input style="width: 90%;" type="text" value="Poor health"/>
Medical conditions:	<input style="width: 90%;" type="text" value="Asthama"/>
Allergies and sensitivities:	<input style="width: 90%;" type="text" value="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	<input style="width: 90%;" type="text"/>
Physical impairment:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input style="width: 90%;" type="text"/>
Visual impairment:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input style="width: 90%;" type="text"/>
<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	<input style="width: 90%;" type="text"/>
Renal function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input style="width: 90%;" type="text"/>
Lunq function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input style="width: 90%;" type="text"/>
Immune status:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input style="width: 90%;" type="text"/>

**Patient factors : Maternal**

Pregnant:  Yes  No  Not Applicable  Not Recorded

Notes

Breast feeding:  Yes  No  Not Applicable  Not Recorded

Notes

**Gluten-free**

Diagnosed coeliac (historical)  Yes  No  Not Recorded

Gluten-free diet:

Number of units:

Dietitian advised:

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

**Complex dispensing patient**

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

Monitored dosage system required by pharmacist

Monitored dosage system requested by prescriber / social services / hospital

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

Instalment dispensing requested by prescriber

Special monitoring and feedback required

**Pharmaceutical care plan priority**

PCP Priority:

Notes

Initial assessment complete:

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

- Edit data and click save, the patient home will be displayed (Figure 4-5)  
\*(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 4-5 shows the patient home after the patient profile has been updated.

Pharmaceutical Care Plan		High Risk Medicine Assessments	New Medicine Interventions
<b>Patient Profile</b>			Show less detail ^
<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			
<a href="#">Review/Edit</a>			

Figure 4-5: 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 4-6)

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

Figure 4-6: "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.

### 4.3 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 4-7)

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 4-7: Add pharmaceutical care risk assessment

- The “Care risk assessment” entry page is displayed (Figure 4-8)

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

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

<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 4-8: 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 4-9) 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	
Care issue with the formulation of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	
Care issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded <span style="color: red;">Selection required.</span>	
Side effect/s with one or more medicines?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Not Recorded	

Figure 4-9: "Selection required" message

**To view an existing medication profile:**

Select the "View" link for the pharmaceutical care risk assessment you want to view (Figure 4-10)

The selected pharmaceutical care risk assessment is displayed - Read only (Figure 4-11).

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

Figure 4-10: Newly created pharmaceutical care risk assessment displayed

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

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

<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 4-11: Care risk assessment - Read only

## 4.4 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.

There are four types of care issues:

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

**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 4-12: Care issues

- Click on the 'Review' link, (Figure 4-12) in the Care Issue Section of the patient home page,
- The care issues review screen is displayed (Figure 4-13)

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

Pharmacy Care Record 

---

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

**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 4-13: 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 4-14)

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 4-15); or
- Select "Cancel" – no changes will be saved, the care issues review screen will be displayed (Figure 4-13)

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

Pharmacy Care Record 

---

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

**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** \* Means a field requires data

Description of care issue  \*

Figure 4-14: 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 4-15)

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

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

**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 4-15: Care issue detail page

- The care issue outcome review page is displayed (Figure 4-16)

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

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

**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	
▼ Poor inhaler technique	Standard		13-Apr-2012	<a href="#">View</a>
Desired outcome	Action	Action by	Response	Status
No child records to display.				

Figure 4-16: 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 4-15)

**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 4-17)

<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		
<a href="#">Review/Edit</a>		

**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 4-17: 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.

## 4.5 Medication

The patient home shows a summary of medication.

### To review medication:

- Select the "Review" link on the patient home (Figure 4-18)

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>	
> Amoxicillian - 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 4-18: Review Medication

- A list of medications are displayed (Figure 4-19)

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

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*

**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>	
> Amoxicillian - 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 4-19: Medications

### To add a medication:

- Click the "Add medication" link (Figure 4-19), the entry/edit medication is displayed (Figure 4-20)

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

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

**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 4-20: 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 4-21)\*

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

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

**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>
<b>Quantity</b>		<b>Direction</b>		<b>Dispensed on</b>	<b>Imported</b>		
No child records to display.							

[Add Medication Dispense](#)

[return to Patient Medications page](#)  
[return to Patient Home Page](#)

Figure 4-21: 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 High risk medicine care risk assessments

### 5.1 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; and
- 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.

### 5.3 Start a HRM 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 5-1)

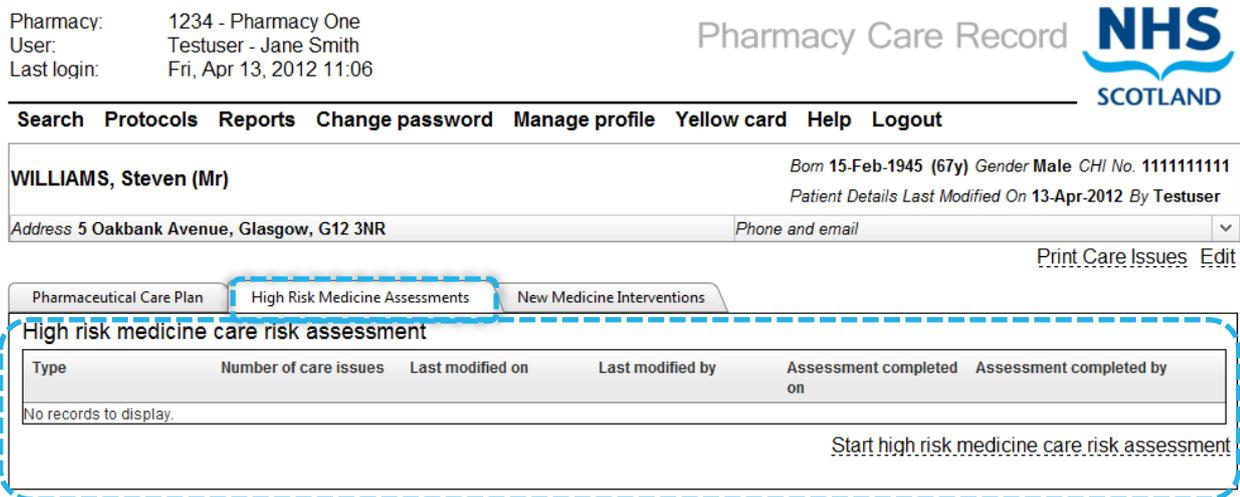


Figure 5-1: high risk medicines tab

- Select "Start high risk medicine care risk assessment" link
- The system will display the " high risk medicine selection" screen (Figure 5-2)

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

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

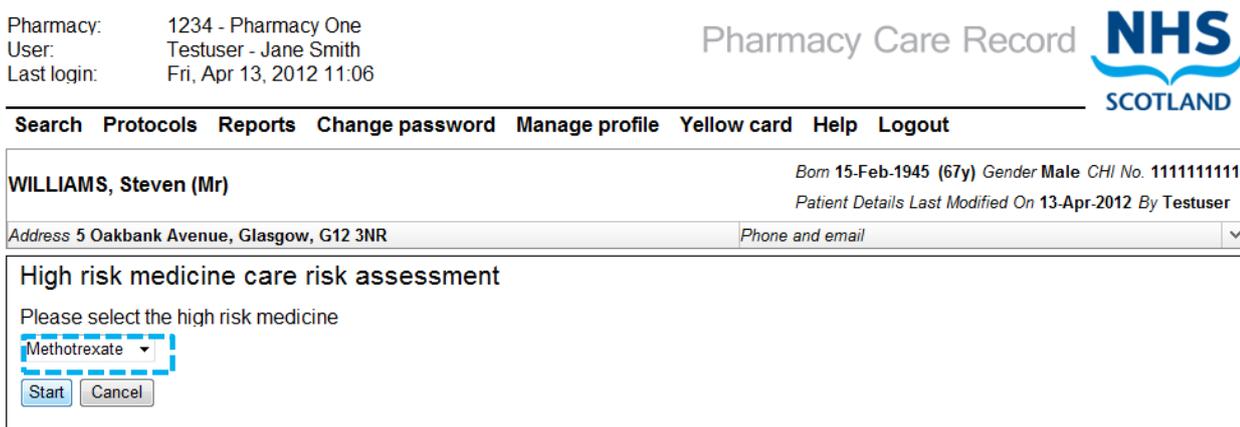
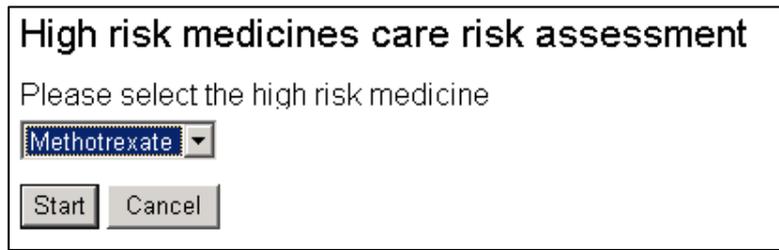


Figure 5-2: Drug Selection

**Note:** "Methotrexate" will be used in this User Guide example.



**High risk medicines care risk assessment**

Please select the high risk medicine

Methotrexate ▼

Start Cancel

Figure 5-3: Select high risk medicine

- Click the "Start" button (Figure 5-3)
- The system will navigate to the Methotrexate "Concordance" questions page (Figure 5-4)

**Note:** By selecting the "Start" button (Figure 5-3), creates a new high risk medicine care risk assessment within PCR.

Selecting the "Cancel" button (Figure 5-3) returns the system to the patient home page – a high risk medicine care risk assessment *is not* created.

## 5.4 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 5-4).

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

Pharmacy Care Record **NHS**  
 SCOTLAND

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

<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

[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.**

[return to Methotrexate Review Page](#)

Figure 5-4: 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 5-5).

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

When as we follow the t  
**Acti**  
**C**  
**ta**  
**If**  
**(e**  
**th**  
**m**  
**di**

Figure 5-5: 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 5-6)

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



Search Protocols Reports Change password Manage profile Yellow card Help Logout

**WILLIAMS, Steven (Mr)** Born 15-Feb-1945 (67y) Gender Male CHI No. 111111111  
Patient Details Last Modified On 13-Apr-2012 By Testuser

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

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

**Interactions and precautions**

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

Is the patient aware that certain OTC medicines can interact with methotrexate?  Yes  No

Serious drug interactions include:

Acitretin and Sulfipyrazone

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.**

[return to Methotrexate Review Page](#)

Figure 5-6: 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 5-7)

**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

---

HFM 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;"><input type="radio"/> Yes <input type="radio"/> No</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;"><input type="radio"/> Yes <input type="radio"/> No</span></p> <p>Is the patient aware of what to do if they are suffering from these signs? <span style="float: right;"><input type="radio"/> Yes <input type="radio"/> No</span></p> <p>Is the patient aware that adverse reactions should be reported? <span style="float: right;"><input type="radio"/> Yes <input type="radio"/> No</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 5-7: 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 5-8); 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

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

<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

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

### Monitoring

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

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

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

Methotrexate has a narrow therapeutic index. Monitoring is very important. Patients should know who is responsible for the prescribing and monitoring of their methotrexate. You should expect to find monitoring will be

**three monthly** for people stable on methotrexate for years and with no co-morbidities

**four to eight weekly** for those in the first couple of years of being on a stable dosage or co-morbidities in long-term users.

**weekly - fortnightly** for those just started.

**Actions:**

**Establish if the patient is receiving regular monitoring.**

**If the patient has not had their blood levels monitored within an appropriate timescale refer them to their GP practice for monitoring, contacting the GP to alert them.**

**Advise the patient to discuss their monitoring arrangements with their GP or practice nurse if there appears to be confusion about the interval.**

**Encourage the patient to check their results are normal with their GP or practice nurse after each test and record the results in their monitoring booklet.**

**Encourage the patient to carry their methotrexate booklet.**

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

[return to Methotrexate Review Page](#)

Figure 5-8: 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 5-7); OR
- Click the "Save & Review" button. The system will navigate to the "Methotrexate Review" screen (Figure 5-9)

## 5.5 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 5-10)

The headings for each question group are hyperlinks to the corresponding questions pages.

**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?	<b>No</b>	+

**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	

[Complete assessment](#)

[return to Patient Home Page](#)

Figure 5-9: Methotrexate review screen

Care Issues associated with the assessment are shown below the questions summary. (Figure 5-9)

The assessment completion status is shown at the bottom of the screen (Figure 5-10)

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

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

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

### Lithium high risk medicine care risk assessment summary

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

#### Concordance

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

#### Interactions and precautions

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

#### Adverse reactions: side effects and toxicity

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

#### Monitoring

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

#### Care issues associated with this assessment

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

[Add](#)

#### Assessment completion

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

[return to Patient Home Page](#)

Figure 5-10: denotes unanswered questions

### 5.5.1 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**

<p><u>Concordance</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Is the patient taking their Warfarin as prescribed?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Does the patient know what to do if they miss a dose?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Does the patient have the patient information and recording booklets and alert card and do they use them?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> </table> <p><u>Interactions and precautions</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">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?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Does the patient know that certain OTC medicines (e.g. ibuprofen or micanazole gel) and foods / alcohol can interact with Warfarin?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> </table>	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>	+ ...	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 micanazole gel) and foods / alcohol can interact with Warfarin?	<b>Yes</b>	+ ...	<p><u>Adverse reactions: side effects and toxicity</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Is the patient aware of the common side effects of Warfarin?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Is the patient aware of the signs of over / under anticoagulation?</td> <td style="text-align: right; padding: 5px;"><b>No</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Is the patient aware what might cause over-anticoagulation and how to avoid this happening?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Is the patient aware of what to do if they are suffering from these signs?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> <tr> <td style="padding: 5px;">Is the patient aware to whom adverse reactions should be reported?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> </table> <p><u>Monitoring</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Has the patient had a recent blood test to check their INR?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+ ...</td> </tr> </table> <p>Use + ... to add care issues for the specific question.</p>	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>	+ ...	Has the patient had a recent blood test to check their INR?	<b>Yes</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>	+ ...																																
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 micanazole 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>	+ ...																																
Has the patient had a recent blood test to check their INR?	<b>Yes</b>	+ ...																																

<p><b>Key messages:</b></p> <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>	<p><b>Actions:</b></p> <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>
---	---

**Care issues associated with this assessment**

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

[Add](#)

**Assessment completion**

Assessment complete	<b>Yes</b>
---------------------	------------

Figure 5-11: Warfarin summary page with key messages and actions text

## 5.6 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 5-12)



Figure 5-12: Add Care Issue / Care Issue Outcome link

- The system will display the high risk medicines "Record care issue" screen (Figure 5-13)

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

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

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

**Care issue**  
 Description of care issue

**Care issue outcome**  
 Desired Outcome

Action

Action By

Response

Status

Review By

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

Figure 5-13: 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: 5px;">Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+</td> </tr> <tr> <td style="padding: 5px;">Is the patient aware that certain OTC medicines can interact with methotrexate?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+</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: 5px;">Is the patient aware of how frequently they should have their blood tests done?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+</td> </tr> <tr> <td style="padding: 5px;">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: 5px;"><b>1</b></td> <td style="text-align: right; padding: 5px;">+</td> </tr> <tr> <td style="padding: 5px;">Does the patient record their blood results in their methotrexate monitoring booklet?</td> <td style="text-align: right; padding: 5px;"><b>Yes</b></td> <td style="text-align: right; padding: 5px;">+</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: 5px;">&gt; Patient unaware that some OTC products can interact with Methotrexate</td> <td style="text-align: center; padding: 5px;">25-Jan-2012</td> <td style="text-align: center; padding: 5px;">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: 5px;">Assessment complete</td> <td style="text-align: right; padding: 5px;"><b>No</b></td> </tr> <tr> <td style="padding: 5px;">Assessment completed by</td> <td></td> </tr> <tr> <td style="padding: 5px;">Assessment completed on</td> <td></td> </tr> <tr> <td colspan="2" style="padding: 5px 0 0 0;"> <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 5-14: Care Issues Associated with This Assessment

## 5.8 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 5-14)
- The care issue form is displayed (Figure 5-15)

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

Pharmacy Care Record **NHS**  
 SCOTLAND

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

**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

<b>Care issue</b>	Description of care issue <input style="width: 90%;" type="text"/> *	
<b>Care issue outcome</b>	Desired Outcome <input style="width: 90%;" type="text"/> *	
Action	<input style="width: 90%;" type="text"/>	
Action By	<input type="text" value="Patient"/>	
Response	<input style="width: 90%;" type="text"/>	
Status	Open	
Review By	<input style="width: 90%;" type="text"/>	

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

Figure 5-15: 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 5-16)

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 5-16: Associated care issues

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

## 5.9 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 5-17)
- The system will set the status of the assessment to completed and refresh the page (Figure 5-18)
- 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>	+

<b>Interactions and precautions</b>		<b>Monitoring</b>	
Is the patient aware they should check that any newly prescribed medicines don't interact with methotrexate? <b>Yes</b>	+	Is the patient aware of how frequently they should have their blood tests done? <b>Yes</b>	+
Is the patient aware that certain OTC medicines can interact with methotrexate? <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>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	
<a href="#">Complete assessment</a>	

[return to Patient Home Page](#)

Figure 5-17: 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 5-18: Assessment completion details updated

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

## 5.10 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 5-19)
- 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 5-19)
- 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



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

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

[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 5-19: High Risk Medicines tab

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

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

**WILLIAMS, Steven (Mr)** Born **15-Feb-1945 (66y)** Gender **Male** CHI No. **1111111111**  
Patient Details Last Modified On **05-Jan-2012** By **Testuser**  
 Address **5 Oakbank Avenue, Glasgow, G12 3NR** Phone and email **01415554444**

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

**Concordance**

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

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.**

Read only

[Next - Interactions & precautions](#)

[return to Methotrexate Review Page](#)

Figure 5-20: Read only – completed assessment

**Note:** All data for a completed HRM Care Risk Assessment is shown as read only (Figure 5-20). 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.

## 6 New medicine interventions

### 6.1 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

### 6.2 Start a new medicine intervention

**To start a new medicine intervention:**

- Select the "New Medicines Interventions" tab on the patient home page (Figure 6-1)
- Select the "Start new medicine intervention" link, the "enter medication details" page will be displayed (Figure 6-2)

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 6-1: New medicines interventions tab on patient home page

## 6.4 Enter medication details

### To enter and save medication details:

- Enter the required information in the medication details page (Figure 6-2)

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 6-2: 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.

## 6.5 Enter answers to initial intervention questions

The Initial intervention entry page is shown in (Figure 6-3)

### To enter answers to initial intervention questions:

- Confirm or select intervention date in the "Intervention" record section of the page (Figure 6-3).

**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 6-4)

<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 6-3: Initial intervention entry page

## 6.6 New medicines interventions review page

This section describes the options available from the new medicines interventions review page (Figure 6-4).

<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>	
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

[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 6-4: 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.

## 6.7 Schedule a follow up intervention

Having started an initial intervention (see section 6.2) 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 6-5), the system will display a "Schedule follow up" pop up form (Figure 6-6)

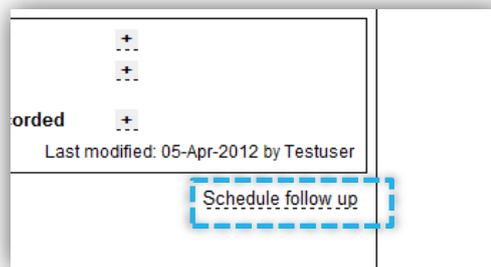


Figure 6-5: "Schedule follow up" link

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

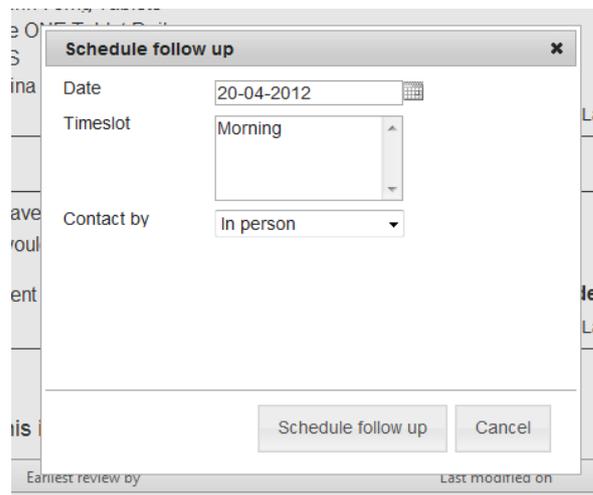


Figure 6-6: Schedule follow up pop up dialogue

- 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 6-7)

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

Figure 6-8: 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 6-7 with the exception that the contact preference is set to 'By Telephone' and the contact number is displayed.

## 6.8 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 6-9.

The screenshot shows a 'Follow up' section in the PCR interface. The 'Follow up' title is highlighted with a dashed blue box. Below it, a table lists intervention details:

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

At the bottom right of this section, it says 'Last modified: 20-Aug-2012 by testuser'. Below the table is a link that says 'Schedule follow up'.

Below the 'Schedule follow up' link is a section titled 'Care issues associated with this intervention'. It contains a table with columns: 'Care issue', 'Earliest review by', and 'Last modified on'. The table is currently empty, showing 'No records to display.' There is an 'Add' link at the bottom right of this section.

Below the 'Care issues' section is a section titled 'Intervention completion'. It contains a table with columns: 'Intervention complete' and 'No'.

Figure 6-9: Select link to edit follow up intervention

- The follow-up intervention edit page will be shown, Figure 6-10.

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 in person

Telephone

#### Intervention record

Scheduled date  e.g: 31-07-2013 for the 31st of July 2013 Timeslot 1pm

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

Record & Review
Cancel

Figure 6-10: 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 6-11.

**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 6-11
- 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 6-11: New medicine intervention review page with completed follow up intervention

## 6.9 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 6-12)



Figure 6-12: Care issues associated with a new medicine intervention

- The "Record care issues for new medicine intervention" page will be displayed (Figure 6-13)

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

[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

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

**Care issue**  
 Description of care issue  \*

**Care issue outcome**  
 Desired Outcome  \*

Action

Action By

Response

Status

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

Figure 6-13: 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 6-14)

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 6-14: 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 6-15)

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 6-15: 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 6-16)

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



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

<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

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

<b>Care issue</b>	Description of care issue <input style="width: 80%;" type="text" value="Patient is having problems or suffering adverse effects"/>
<b>Care issue outcome</b>	Desired Outcome <input style="width: 80%;" type="text" value="Patient is not having problems or suffering adverse effects"/>
Action	<input style="width: 80%;" type="text"/>
Action By	<input style="width: 80%;" type="text" value="Patient"/>
Response	<input style="width: 80%;" type="text"/>
Status	<input style="width: 80%;" type="text" value="Open"/>
Review By	<input style="width: 80%;" type="text"/>

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

Figure 6-16: 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 6-14)

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

## 6.10 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 6-17).

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

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;"> <span>Select...</span> <ul style="list-style-type: none"> <li style="background-color: #e0e0e0; padding: 2px;">Select...</li> <li style="padding: 2px;">Adhering</li> <li style="padding: 2px;">Not Adhering</li> <li style="padding: 2px;">Lost to intervention</li> </ul> </div>

[return to Patient Home Page](#)

Figure 6-17: Intervention completion

- Select the "Complete intervention" button, the page will refresh and the intervention completion information will be updated (Figure 6-18)

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 6-18: Intervention completion information displayed

## 6.11 Summary of new medicine interventions for an individual patent

The new medicine interventions tab on the patient home page shows a summary of all new medicine interventions for a patient (Figure 6-19).

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](#)

<b>SMITH, Johnathan (Mr)</b>	<i>Born 03-Feb-1973 (39y) 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

**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 6-19: 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")

## 7 Gluten-free support tool assessment

### 7.1 Overview

This support tool assessment allows pharmacists to manage information about patients that are following a Gluten-free diet. At present, "Gluten-free" is the only support tool assessment.

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

The questions are grouped into the following sections:

- Concordance
- Interactions and precautions
- Adverse effects
- Monitoring

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

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

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

A Gluten-free support tool assessment care issue and care issue outcome can be created with prepopulated text based on the context of an individual question. They can also be created independent of the questions – without prepopulated text.

A Gluten-free support tool assessment supports the concept of a status – Open or Completed. care issues and care issue outcomes can continue to be added and updated to a completed Gluten-free support tool assessment.

## 7.2 Start a Gluten-free Support Tool Assessment

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

- Select the "Support tools" tab on the patient home page (Figure 7-1)
- Select the "Start support tool assessment" link, the "Support tool selection" page will be displayed (Figure 7-2)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 7, 2013 11:03

Pharmacy Care Record **NHS**  
SCOTLAND

---

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

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

Address Phone and email ▼

Print Care Issues Edit

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

**Support tool assessments**

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

[Start support tool assessment](#)

Figure 7-1: Support tools tab

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

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

Pharmacy Care Record **NHS**  
SCOTLAND

---

Search Protocols Reports Change password Manage profile Yellow card Help Logout

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

Address Phone and email ▼

**Support tool assessment**

Please select the support tool

Gluten-free ▼

Figure 7-2: Support tool selection

*"Gluten-free" is the only support tool at present.*

*By selecting the "Start" button (Figure 7-2), this will create a new Gluten-free support tool assessment within PCR. Selecting the "Cancel" button will return the system to the patient home page – a Gluten-free support tool assessment will not be created.*

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

Having completed the steps in section 7.2, this section guides you through the procedure to create and save a Gluten-free support tool assessment.

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

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

#### Step 1 - Answer "Concordance" Questions:

- Provide an answer to all questions on the "Concordance" page by selecting either 'Yes' or 'No' for each question, Figure 7-3.

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

<b>WILLIAMS, Alan (Mr)</b>		Born 17-Oct-1971 (41y) Gender Male CHI No. 5555555555	
		Patient Details Last Modified On 10-Oct-2013 By Testuser	
Address		Phone and email	
<a href="#">Gluten-free assessment</a> > <b>Concordance</b> > <a href="#">Interactions &amp; precautions</a> > <a href="#">Adverse effects</a> > <a href="#">Monitoring</a> > <a href="#">Review</a>			
<b>Concordance</b> Is the patient adhering to their gluten-free diet? <input type="radio"/> Yes <input type="radio"/> No Does the patient understand how to identify foods that may contain gluten? <input type="radio"/> Yes <input type="radio"/> No Does the patient have information that will support their concordance with a gluten-free diet? <input type="radio"/> Yes <input type="radio"/> No		<p>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.</p> <p><b>Actions:</b></p> <p><b>Check the patient's feelings about how they are managing with their diet.</b></p> <p><b>Check if the patient is confident that they can identify foods that contain gluten.</b></p> <p><b>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.</b></p> <p><b>Signpost the patient to Coeliac UK (www.coeliac.org.uk).</b></p> <p><b>Record any care issues in the patient's care plan and agree desired outcomes and actions.</b></p> <p><b>Refer to the community dietitian, patient's GP, or as per healthboard guidelines.</b></p>	
		<input type="button" value="Next - Interactions &amp; precautions"/> <input type="button" value="Save &amp; Review"/>	

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

Figure 7-3: 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 7-4.

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](#)

<b>WILLIAMS, Alan (Mr)</b>		Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555	
		Patient Details Last Modified On 10-Oct-2013 By Testuser	
Address		Phone and email	
<p><i>Gluten-free assessment : Concordance &gt; <b>Interactions &amp; precautions</b> &gt; Adverse effects &gt; Monitoring &gt; Review</i></p> <p><b>Interactions &amp; precautions</b></p> <p>Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Is the patient aware of how to take these medicines properly, if indicated? <input type="radio"/> Yes <input type="radio"/> No</p> <div style="border: 1px solid black; padding: 5px;"> <p>Health risks associated with non-compliance with a gluten-free diet include osteoporosis, chronic malabsorption, and gut lymphoma.</p> <p><b>Actions:</b></p> <p><b>Provide advice on how to take the medicines properly.</b></p> <p><b>Record any care issues in the patient's care plan and agree desired outcomes and actions.</b></p> </div> <p style="text-align: right;"> <input type="button" value="Back - Concordance"/> <input type="button" value="Next - Adverse effects"/> <input type="button" value="Save &amp; Review"/> </p>			

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

Figure 7-4: 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 7-5.

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](#)

<b>WILLIAMS, Alan (Mr)</b>		Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555	
		Patient Details Last Modified On 10-Oct-2013 By Testuser	
Address		Phone and email	
<p><a href="#">Gluten-free assessment</a> &gt; <a href="#">Concordance</a> &gt; <a href="#">Interactions &amp; precautions</a> &gt; <b>Adverse effects</b> &gt; <a href="#">Monitoring</a> &gt; <a href="#">Review</a></p> <h4>Adverse effects</h4>			
Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?	<input type="radio"/> Yes <input type="radio"/> No	Patients who do not adhere strictly to their diet may experience a decreased appetite, weight loss, diarrhoea, anaemia, mouth ulcers, abdominal bloating, lethargy, nausea and blood in stools. <b>Actions:</b> 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.	
Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?	<input type="radio"/> Yes <input type="radio"/> No		
Is the patient aware that adverse effects should be reported?	<input type="radio"/> Yes <input type="radio"/> No		
<input type="button" value="Back - Interactions &amp; precautions"/>		<input type="button" value="Next - Monitoring"/>	<input type="button" value="Save &amp; Review"/>

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

Figure 7-5: 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 7-6.

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

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

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

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

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

Address Phone and email

---

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

### Monitoring

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

Gluten-free annual health check not completed in pharmacy

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

Height or weight or both not available

Height (m)

Weight (kg)

BMI

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

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

**Actions:**

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

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

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

Figure 7-6: Monitoring

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

*Height and weight are mandatory unless "Height or weight or both not available" checkbox is selected.*

*User Options:*

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

## 7.4 Gluten-free support tool assessment summary page

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](#)

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

Address Phone and email

---

Gluten-free assessment > Concordance > Interactions & precautions > Adverse effects > Monitoring > Review

### Gluten-free assessment summary

**Concordance**

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

**Adverse effects**

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

**Interactions and precautions**

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

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

**Monitoring**

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

Care issues associated with this assessment

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

[Add](#)

Assessment completion

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

Link to questions page

Add care issue link

[return to Patient Home Page](#)

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

Care issues associated with the assessment are shown below the questions summary. The assessment completion status is shown at the bottom of the page.

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

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

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

### Step 1: Select link

- Select a  link for the question on the Gluten-free Summary page that you want to create a care issue / care issue outcome for, (Figure 5-12)

#### Gluten-free assessment summary

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

Figure 7-8: Add Care Issue / Care Issue Outcome link

- The system will display the support tool assessment “Record care issue” page (Figure 7-9)

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

Pharmacy Care Record 

[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" 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 7-9: 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.

## 7.6 Create associated care issue and care issue outcome using the "Add" link

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

### Step 1: Select "Add" link

- Select the "Add" link at the bottom of the "Care issues associated with this assessment" grid on the Gluten-free assessment summary page, Figure 5-14.
- The care issue form is displayed (Figure 5-15)

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

Pharmacy Care Record 

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

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

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

<b>Care issue</b>	Description of care issue <input style="width: 90%;" type="text" value=""/>		
<b>Care issue outcome</b>	Desired Outcome <input style="width: 90%;" type="text" value=""/>		
Action	<input style="width: 90%;" type="text" value=""/>		
Action By	<input type="text" value="Patient"/>		
Response	<input style="width: 90%;" type="text" value=""/>		
Status	<input type="text" value="Open"/>		
Review By	<input style="width: 90%;" type="text" value=""/>		

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

Figure 7-10: 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 "Methotrexate Review" screen
- The newly created care issue / care issue outcome will be listed in the "care issues associated with this assessment" grid (Figure 5-16)

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 7-11: Associated care issues

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

**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 7-12)

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

Gluten-free assessment summary

Concordance

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

Interactions and precautions

Is the patient prescribed folic acid, iron or calcium and Vitamin D supplements?	<b>Unanswered</b>	<input type="checkbox"/>
Is the patient aware of how to take these medicines properly, if indicated?	<b>Unanswered</b>	<input type="checkbox"/>

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>Unanswered</b>	<input type="checkbox"/>
Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?	<b>Unanswered</b>	<input type="checkbox"/>
Is the patient aware that adverse effects should be reported?	<b>Unanswered</b>	<input type="checkbox"/>

Monitoring

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

Care issues associated with this assessment

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

Add

Figure 7-12: Care Issues Associated with This Assessment

## 7.8 Set the status of a Gluten-free support tool assessment to "Completed"

### To "Complete" a Gluten-free support tool assessment:

- From the GLUTEN-FREE review page, select the "Complete assessment" button in the "Assessment completion" section of the Review screen (Figure 5-17)
- The system will set the status of the assessment to completed and refresh the page (Figure 7-14)
- The assessment completion details will be updated:
  - Assessment Complete = Yes
  - Assessment completed by – Pharmacist ID
  - Assessment completed on - date

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

consuming foods that contain gluten? **Unanswered** +  
Is the patient aware that adverse effects should be reported?

**Interactions and precautions**

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

Use + to add care issues for the specific question.

**Monitoring**

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

**Care issues associated with this assessment**

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

[Add](#)

**Assessment completion**

Assessment complete **No**  
Assessment completed by  
Assessment completed on  
[Complete assessment](#)

[return to Patient Home Page](#)

Figure 7-13: Assessment completion details for an "Open" assessment

**Assessment completion**

Assessment complete **Yes**  
Assessment completed by **Testuser**  
Assessment completed on **22-Oct-2013**

[return to Patient Home Page](#)

Figure 7-14: Assessment completion details updated

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

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

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

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

- Select the “Edit” link for the Gluten-free support tool assessment you want to edit (Figure 7-15/Figure 5-19)
- The system will navigate to the Gluten-free support tool assessment Review page

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

- Select the “View” link for the Gluten-free support tool assessment you want to View (Figure 7-15/Figure 5-19)
- The system will navigate to the Gluten-free support tool assessment summary page, Figure 7-7.

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

[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

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

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

### Support tool assessments

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

[Start support tool assessment](#)

Figure 7-15: Support Tools tab

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

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

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

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

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

#### Concordance

Is the patient adhering to their gluten-free diet?  Yes  No

Does the patient understand how to identify foods that may contain gluten?  Yes  No

Does the patient have information that will support their concordance with a gluten-free diet?  Yes  No

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

**Actions:**

- Check the patient's feelings about how they are managing with their diet.
- Check if the patient is confident that they can identify foods that contain gluten.
- Enquire if the patient is aware of the symptoms caused by eating gluten. There is wide variation in the severity of symptoms; some patients do not experience any symptoms.
- Signpost the patient to Coeliac UK ([www.coeliac.org.uk](http://www.coeliac.org.uk)).
- Record any care issues in the patient's care plan and agree desired outcomes and actions.
- Refer to the community dietitian, patient's GP, or as per healthboard guidelines.

[Next - Interactions & precautions](#)

Read only

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

Figure 7-16: Read only – completed assessment

**Note:** All data for a completed Gluten-free support tool assessment is shown as read only (Figure 5-20). This means that responses for a completed Gluten-free support tool assessment cannot be edited; however, it is still possible to add a Care Issue / Care Issue Outcome to a completed Gluten-free support tool assessment.

## 8 Reports

### 8.1 Overview

Using the "Reports" function a user can obtain relevant information about patients registered in PCR for a particular pharmacy. There are five report categories:

- Care issue and patient report
- New medicine intervention support tool reports
- Complex dispensing patient reports
- Gluten-free reports
- High risk medicine assessment support tool reports

The Reports page is accessed from the PCR high level menu (Figure 8-1).

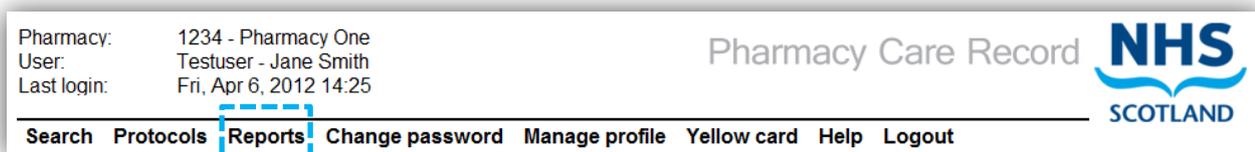


Figure 8-1: reports link on high level menu

A count of the number of records in each report is shown opposite the report title in square brackets, Figure 8-2.

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

**Reports**

<b>Care issue and patient report</b>	
Outstanding care issues	
Patient report for associated pharmacy	
<b>New medicine intervention support tool reports</b>	
All new medicine interventions for the pharmacy	[01]
All open new medicine interventions	[01]
Follow ups scheduled up to TODAY	[01]
Follow ups scheduled up to 7 days from today	[01]
Follow ups scheduled up to 14 days from today	[01]
Follow ups scheduled up to 28 days from today	[01]
Open new medicine interventions without any follow ups	[01]
Completed new medicine interventions	[01]
<b>Complex dispensing patient reports</b>	
Complex dispensing patient set to Yes	[01]
Complex dispensing patient set to No	[01]
Complex dispensing patient set to Not Recorded	[2]
<b>Gluten-free reports</b>	
Diagnosed coeliac patients (historical)	[01]
Gluten-free diet set to Yes	[01]
Gluten-free diet set to No	[01]
Gluten-free diet set to Not Recorded	[2]
All gluten-free assessments	[1]
All open gluten-free assessments	[1]
All completed gluten-free assessments	[01]
Annual health check scheduled up to 8 weeks from today	[01]
Annual health check not completed in pharmacy	[01]
<b>High risk medicine assessments support tool reports</b>	
All high risk medicine assessments for the pharmacy	[01]
All open high risk medicine assessments	[01]
All completed high risk medicine assessments	[01]

Figure 8-2: Reports Page with record count highlighted

## 8.2 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 (**Error! Reference source not found.**)
- The outstanding care issues criteria will be displayed (Figure 8-3)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 08:56

Pharmacy Care Record 

---

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

### Outstanding care issues

**Criteria**

Review by date, from  to  e.g: 31-07-2013 for the 31st of July 2013

Care Issue Type

Figure 8-3: Outstanding care issues report criteria

- Select the “Generate Report” button, all outstanding care issues for the associated pharmacy will be displayed Figure 8-4

**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, and Gluten-free.

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 08:56

Pharmacy Care Record 

---

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

### Outstanding care issues

**Criteria**

Review by date, from  to  e.g: 31-07-2013 for the 31st of July 2013

Care Issue Type

**Report**

	Patient	DOB	CHI	Postcode	
>	Ms Jane Smith	07-Aug-1990	9008075679	EH54 7EZ	<a href="#">View</a>
>	Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	<a href="#">View</a>

Figure 8-4

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

- Patient name
- Date of birth
- CHI
- Postcode
- "View" link

Selecting the "View" link will navigate to the corresponding patient home.

### 8.3 PCR 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 (**Error! Reference source not found.**)
- The report criteria options will be displayed (Figure 8-5)
- Click the "generate report button" (Figure 8-5)

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Tue, Apr 10, 2012 15:03

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

#### 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 8-5: 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 8-6)

Pharmacy: 1234 - Pharmacy One  
 User: testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 13:18

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

#### 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

Report							Number of patients on report: 1
Family name	Given name	CHI	Created on	PCP Priority	Modified on	Number of care issues	Latest care risk assessment
Smith	Johnathan	0102031231	13-Apr-2012	Medium Priority	13-Apr-2012	9	05-May-2005 <a href="#">View</a>

Figure 8-6: Patient Report Showing Patients with No Initial Assessment Completed Flag

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

- Family name
- Given name
- CHI
- The date the record was created PCP Priority as defined by the pharmacist
- Date the patient's record was last modified
- Number of care issues
- Date of the latest care risk assessment – 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 4.3 of this user guide) for the patient

Selecting the "View" link will navigate to the corresponding patient home. (Figure 8-7)

							Generate Report
<b>Report</b>							Number of patients on report: 1
Family name	Given name	CHI	Created on	PCP Priority	Modified on	Number of care issues	Latest care risk assessment
Smith	Johnathan	0102031231	13-Apr-2012	Medium Priority	13-Apr-2012	9	05-May-2005

Figure 8-7: "View" link

## 8.4 New Medicine intervention reports

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 (**Error! Reference source not found.**)

**Note:** Reports that are specific to follow up interventions will only return follow up interventions not yet marked as complete.

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

- Select the report link (Figure 8-8)

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



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

### Reports

Care issue and patient report	
<a href="#">Outstanding care issues</a> <a href="#">Patient report for associated pharmacy</a>	
New medicine intervention support tool reports	
<a href="#">All new medicine interventions for the pharmacy</a>	[01]
<a href="#">All open new medicine interventions</a>	[01]
<a href="#">Follow ups scheduled up to TODAY</a>	[01]
<a href="#">Follow ups scheduled up to 7 days from today</a>	[01]
<a href="#">Follow ups scheduled up to 14 days from today</a>	[01]
<a href="#">Follow ups scheduled up to 28 days from today</a>	[01]
<a href="#">Open new medicine interventions without any follow ups</a>	[01]
<a href="#">Completed new medicine interventions</a>	[01]

Figure 8-8: New medicine intervention support tool report links

- The report is displayed (Figure 8-9)

Pharmacy: 1234 - Pharmacy One  
 User: testuser - Jane Smith  
 Last login: Fri, Apr 13, 2012 13:38

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

All new medicine interventions report						Number of records on report: 1
Patient Name	CHI	Medicine detail	Last modified on	Last modified by	Status	
Mr Johnathan Smith	0102031231	Aspirin 75mg Tablets	13-Apr-2012	Testuser	Open	<a href="#">Review</a>

[return to Reports Page](#)

Figure 8-9: All new medicine interventions report

**Report Data**

<b>Report Name</b>	<b>Report columns</b>
All new medicine interventions for the pharmacy All open new medicine interventions report Open new medicine interventions without any follow ups Completed new medicine interventions	<ul style="list-style-type: none"> <li>• Patient Name</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>
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	<ul style="list-style-type: none"> <li>• Scheduled date (hover for timeslot)</li> <li>• Patient name</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>

**Note:** All new medicine intervention reports display a count of the number of records returned.

## 8.5 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 form the reports page, Figure 8-2 (Separate links for Yes, No, or Not recorded)
- The report detail will be displayed, Figure 8-10.

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



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

Complex dispensing patient set to Yes									Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Monitored dosage system required by pharmacist	Monitored dosage system requested	Other adherence support required	Special monitoring and feedback required	Instalment dispensing requested by prescriber	
Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	Yes	-	Yes	-	-	<a href="#">View</a>

[return to Reports Page](#)

Figure 8-10: Example complex dispensing report (Example: set to "Yes")

Each complex dispensing patient report displays:

- Patient name
- 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.

## 8.6 Gluten-free reports

Gluten-free reports are accessed from a link on the Reports Page, Figure 8-2.

The following reports are available:

- Diagnosed coeliac patients (historical)
- Gluten-free diet set to Yes
- Gluten-free diet set to No
- Gluten-free diet set to Not Recorded
- All gluten-free assessments
- All open gluten-free assessments
- All completed gluten-free assessments
- Annual health check scheduled up to 8 weeks from today
- Annual health check not completed in pharmacy

### To view a Gluten-free report:

- Select link from the Reports page
- The report detail will be displayed, Figure 8-11

Pharmacy: 1234 - Pharmacy One  
 User: Testuser - Jane Smith  
 Last login: Mon, Oct 14, 2013 08:56



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

Gluten-free diet set to Not Recorded					Number of records on report: 1
Patient name	Date of birth	CHI	Post code	Gluten-free diet	
Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	Not Recorded	<a href="#">View</a>

[return to Reports Page](#)

Figure 8-11: Gluten-free diet "Not Recorded" as example.

Report	Report Data
Diagnosed coeliac patients (historical)	Patient Name Date of birth CHI Post Code "View" link
Gluten-free diet set to Yes Gluten-free diet set to No Gluten-free diet set to Not Recorded	Patient Name Date of birth CHI Post Code Gluten-free diet "View" link
All gluten-free assessments All open gluten-free assessments All completed gluten-free assessments	Patient Name CHI Last modified on Last modified by Status "Review" link

Annual health check scheduled up to 8 weeks from today	Patient Name CHI Date of annual health check Last modified on Last modified by Status "Review" link
Annual health check not completed in pharmacy	Patient Name CHI Last modified on Last modified by Status "Review" link

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

## 8.7 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 8-2.

- 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 8-2.
- The report detail will be displayed, Figure 8-12 (Example shown "All")

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



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

### 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 8-12: All High Risk Medicine Assessments as example

All high risk medicine assessments reports display the following information:

- Patient Name
- 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.

## 9 PMR interface to PCR

### 9.1 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 9-1 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.

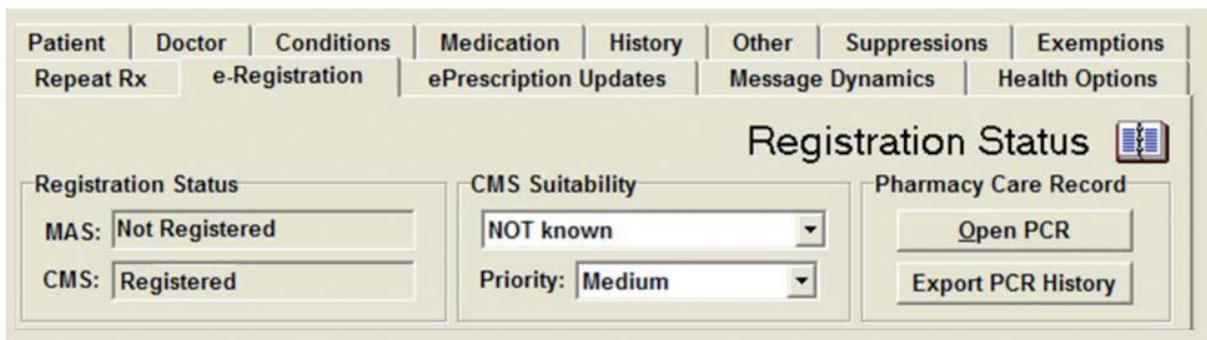


Figure 9-1: link to PCR from the Cegedim RX Pharmacy Manager PMR

Figure 9-2 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 PMR History’ which is used for transferring the patient’s medication history to PCR.

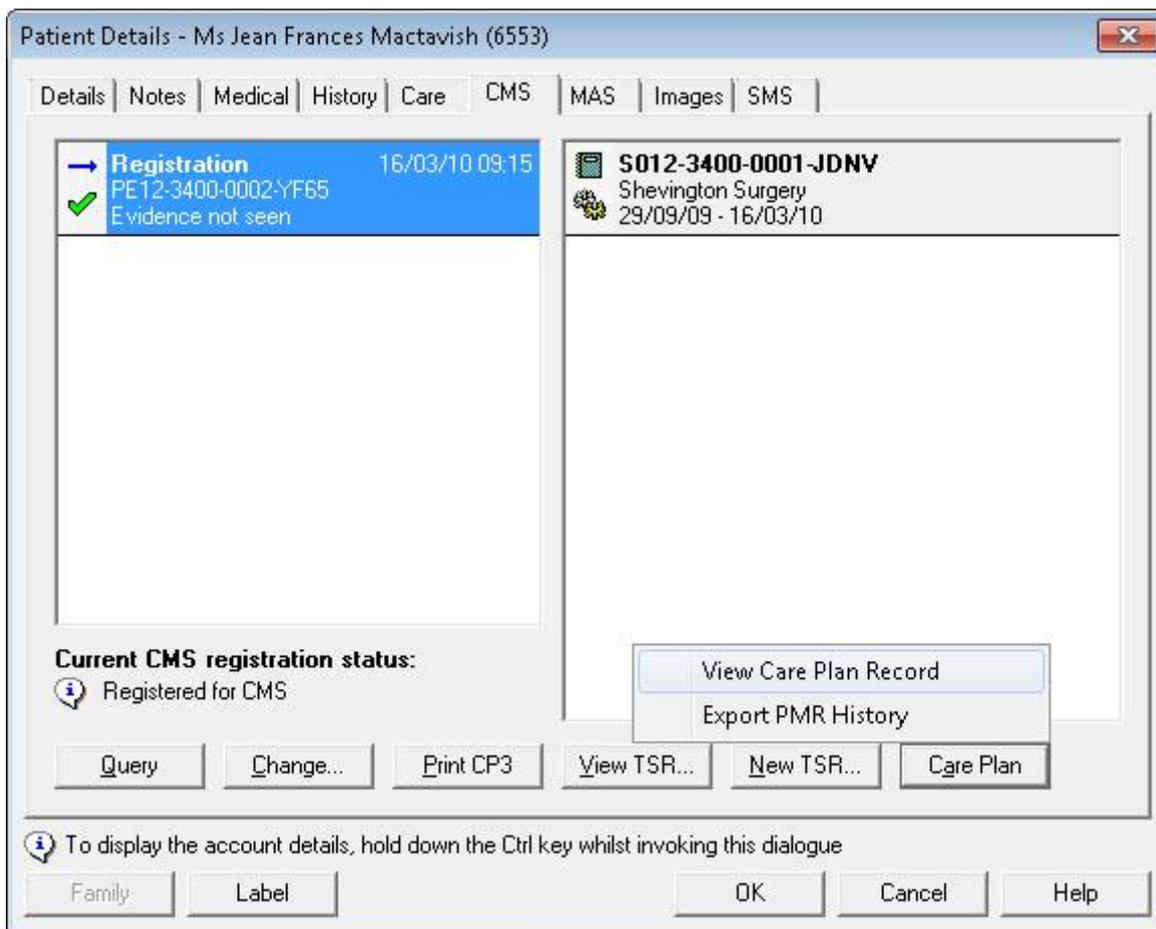


Figure 9-2: Positive Solution’s Analyst PMR system

## 9.2 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 9-3) 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
<b>Family name</b> Patient	<b>Family name</b> Patient
<b>Given name</b> Demo	<b>Given name</b> Demo
<b>Title</b> Mr	<b>Title</b> Mr
<b>Date of birth</b> 01-Jan-1960	<b>Date of birth</b> 01-Jan-1960
<b>Address 1</b> 3 Appleton Parkway	<b>Address 1</b> 2 Linwood Road
<b>Address 2</b> Livingston	<b>Address 2</b> Linwood
<b>Address 3</b> West Lothian	<b>Address 3</b> Paisley
<b>Address 4</b>	<b>Address 4</b>
<b>Address 5</b>	<b>Address 5</b>
<b>Postcode</b> EH54 7EZ	<b>Postcode</b> PA3 3BB
<b>Home telephone number</b> 0123456789	<b>Telephone number</b> 0987654321
<b>Gender</b> Male	<b>Gender</b> Male

Do you want to update PCR with the information from the PMR?

Figure 9-3: 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.

### 9.3 Medication history transfer

The medication history transfer is a two-stage process: first, you create an export file using your PMR system and then you need to import the file into PCR.

#### Creating the medication export file on your PMR:

The medication export file contains the last 24 weeks of dispensing history held for the patient on your PMR from the date of creating the export file. The history export file will include the following details for each item dispensed:

- Medication name
- Pharmacy service (AMS, CMS, etc.)
- Date dispensed
- Quantity dispensed
- Directions for use

The medication name will be the prescribed item name for prescriptions processed electronically (AMS, CMS and MAS). Where the prescription has not been processed from

electronic data then the medication name may be the name of the dispensed product, i.e. the brand name.

To create the export file you select the relevant patient in your PMR system (note the patient must be registered for CMS), then choose the 'PMR History Export' (or equivalent) option from the PCR interface functionality on your PMR system.

Your PMR system will automatically create an export file.

*Note: you need to complete the medication history transfer to PCR on the same computer as you performed the export Importing the medication import file to PCR*

The export file will be named as follows: MHddmmyyxxxx.xml where ddmmyyxxxx is the patient's CHI number. If an export file already exists for a patient the file will be overwritten by any subsequent created export file.

You then click on the 'Import Medication' link. This opens a page requesting you to select the location of the export file that you previously created on your PMR.

### 9.3.1 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 9-4)

Contractor Code : 1234 - Pharmacy One  
Current User : 1234567 - Test User

Pharmacy Care Record **NHS SCOTLAND**

Search Protocols Reports Change password Help Logout

**PATIENT, Demo (Mr)** Born 01-Jan-1960 (50y) Gender Male CHI No. 777777777  
Patient Details Last Modified On 13-Apr-2010 By 1234567

Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ Phone and email 0123456789

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported
> StJohns Wort	12-Apr-2010	OTC	Depression	13-Apr-2010	1234567	False <a href="#">View</a>
> Aspirin 75mg Tablets	01-Jan-2010	CPUS		13-Apr-2010	1234567	False <a href="#">View</a>

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

[return to Patient Home Page](#)

Figure 9-4: Medications page

Contractor Code : 1234 - Pharmacy One  
Current User : 1234567 - Test User

Pharmacy Care Record **NHS SCOTLAND**

Search Protocols Reports Change password Help Logout

**PATIENT, Demo (Mr)** Born 01-Jan-1960 (50y) Gender Male CHI No. 777777777  
Patient Details Last Modified On 13-Apr-2010 By 1234567

Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ Phone and email 0123456789

**Import Medications**

Choose file

[return to Patient Medications page](#)  
[return to Patient Home Page](#)

Figure 9-5: 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 9-5, 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.

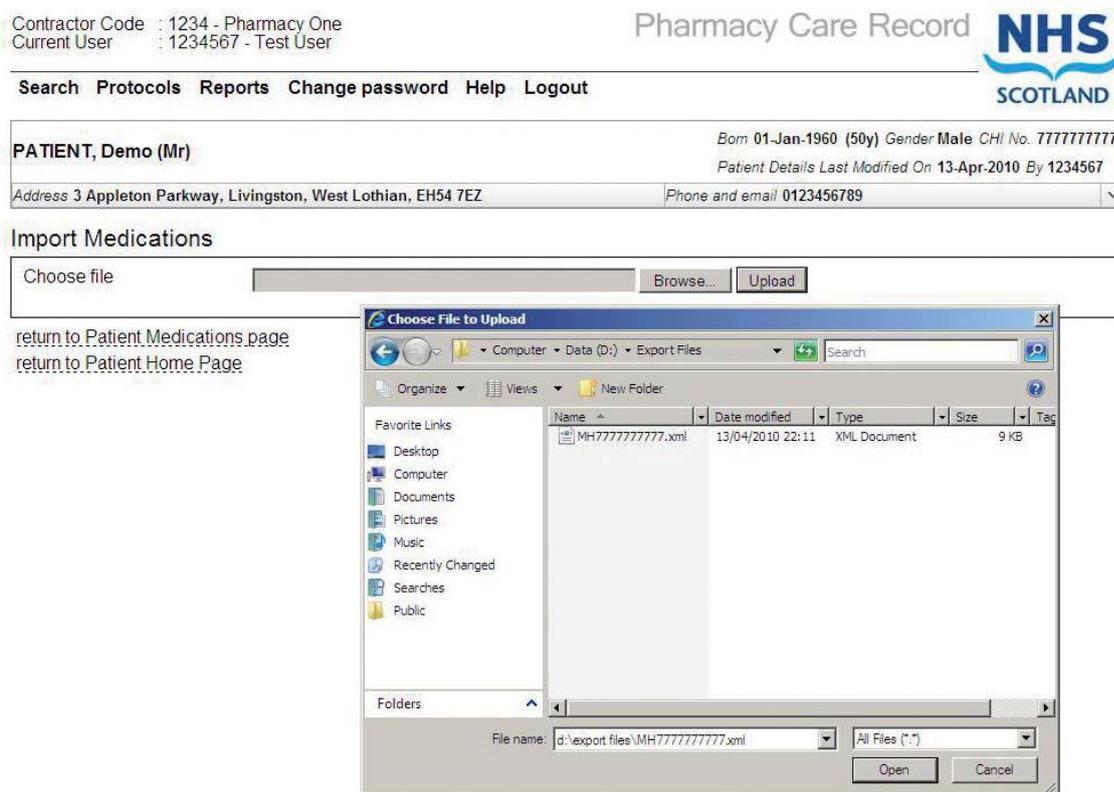


Figure 9-6: PCR medication import page and standard windows file open dialog

If the box is 'greyed out' preventing you from entering information, click the 'Browse' button shown in Figure 9-6. 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 9-6 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 9-7 will be displayed.

Contractor Code : 1234 - Pharmacy One Current User : 1234567 - Test User		Pharmacy Care Record 	
Search Protocols Reports Change password Help Logout			
<b>PATIENT, Demo (Mr)</b>		Born 01-Jan-1960 (50y) Gender Male CHI No. 3333333333 Patient Details Last Modified On 13-Apr-2010 By 1234567	
Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ		Phone and email 0123456789	
<b>Import Medications</b>			
Are you sure you wish to import the medication data of patient PATIENT, Demo (Mr)? <input type="button" value="Yes"/> <input type="button" value="No"/>			
<a href="#">return to Patient Medications page</a> <a href="#">return to Patient Home Page</a>			

Figure 9-7: 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 9-8 shows several expanded medication lines which are displayed by clicking ‘>’ and show the dispensing history over the period of time.

Contractor Code : 1234 - Pharmacy One  
 Current User : 1234567 - Test User

Pharmacy Care Record **NHS**  
 SCOTLAND

Search Protocols Reports Change password Help Logout

---

**PATIENT, Demo (Mr)** Born 01-Jan-1960 (50y) Gender Male CHI No. 777777777  
Patient Details Last Modified On 13-Apr-2010 By 1234567

Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ Phone and email 0123456789

**Medications**

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported
> St Johns Wort	12-Apr-2010	OTC	Depression	13-Apr-2010	1234567	False <a href="#">View</a>
> Chloramphenicol 0.5% eye drops (Co-Pharma)	26-Feb-2010	MAS		13-Apr-2010	1234567	True <a href="#">View</a>
> Aspirin 75mg Tablets	01-Jan-2010	CPUS		13-Apr-2010	1234567	False <a href="#">View</a>
> E45 Crm	24-Jun-2009	CMS		13-Apr-2010	1234567	True <a href="#">View</a>
> Atorvastatin Tabs 40MG	24-Jun-2009	CMS		13-Apr-2010	1234567	True <a href="#">View</a>
<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 (Sohering-Plough Ltd) 50 gram	26-May-2009	other		13-Apr-2010	1234567	True <a href="#">View</a>
> Xalatan 50micrograms/ml eye drops (Pfizer Ltd) 2.5 ml	26-May-2009	other		13-Apr-2010	1234567	True <a href="#">View</a>
> Paracetamol 500mg coaplets (Teva UK Ltd) 32 tablet 4 x 8 tablets	26-May-2009	other		13-Apr-2010	1234567	True <a href="#">View</a>
> Aspirin Tabs 75MG	26-May-2009	AMS		13-Apr-2010	1234567	True <a href="#">View</a>
> Levothyroxine Tabs 50MICROGRAMS	26-May-2009	AMS		13-Apr-2010	1234567	True <a href="#">View</a>
<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 coaplets (M&A) [DPS=32]	26-Feb-2009	MAS		13-Apr-2010	1234567	True <a href="#">View</a>

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

[return to Patient Home Page](#)

Figure 9-8: several expanded medication lines

### 9.3.2 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 9-9 shows the addition of an indication for an item that has been imported from a PMR.

Contractor Code : 1234 - Pharmacy One  
 Current User : 1234567 - Test User

Pharmacy Care Record **NHS**  
 SCOTLAND

Search Protocols Reports Change password Help Logout

---

**PATIENT, Demo (Mr)** Born 01-Jan-1960 (50y) Gender Male CHI No. 777777777  
Patient Details Last Modified On 13-Apr-2010 By 1234567

Address 3 Appleton Parkway, Livingston, West Lothian, EH54 7EZ Phone and email 0123456789

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

Name                      Atorvastatin Tabs 40MG\*

Service                      CMS

Indication                     

Last dispensed on                      24-Jun-2009

Imported                      Yes

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

### 9.3.4 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 you have completed the import process. You will recall that all these files will begin with 'MH' followed by the patient's CHI number and end with '.XML'.

These files can be removed using Windows Explorer; all files will be in the same folder but you should exercise caution to ensure that you only remove the PCR medication history export files and do not remove other files that may be required for other applications.

## 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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 PMR supplier may have added icons to your computer desktop enabling you to quickly access PCR without entering the relevant URL into Internet Explorer. If you do not have the required PCR icons on your computer desktop then you can add them by following these instructions.

**Note:** the instructions detail the creation of an icon for the main PCR website but can be repeated for the creation of an icon for accessing the PCR Association website.

### To create a PCR icon on your desktop:

- Type the PCR website <https://pcr.mhs.scot.nhs.uk> into the address bar of your browser, the PCR login page is displayed
- Right-click anywhere on the page, Internet Explorer context menu is displayed (Figure 9-10)
- Select "Create Shortcut" from the context menu

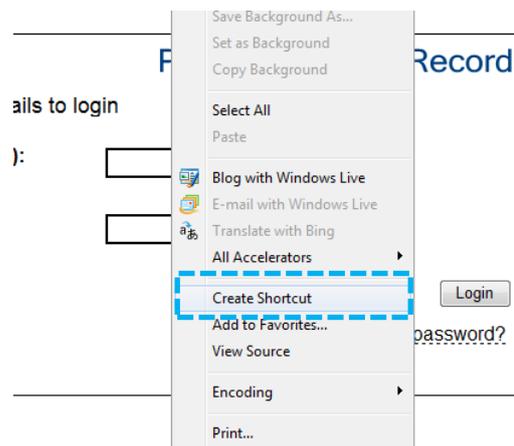


Figure 9-10:right click to "Create shortcut"

- A popup message will be displayed (Figure 9-11)



Figure 9-11: Confirm "Create shortcut"

- Select "Yes"
- A shortcut to PCR is placed on your Desktop (Figure 9-12)

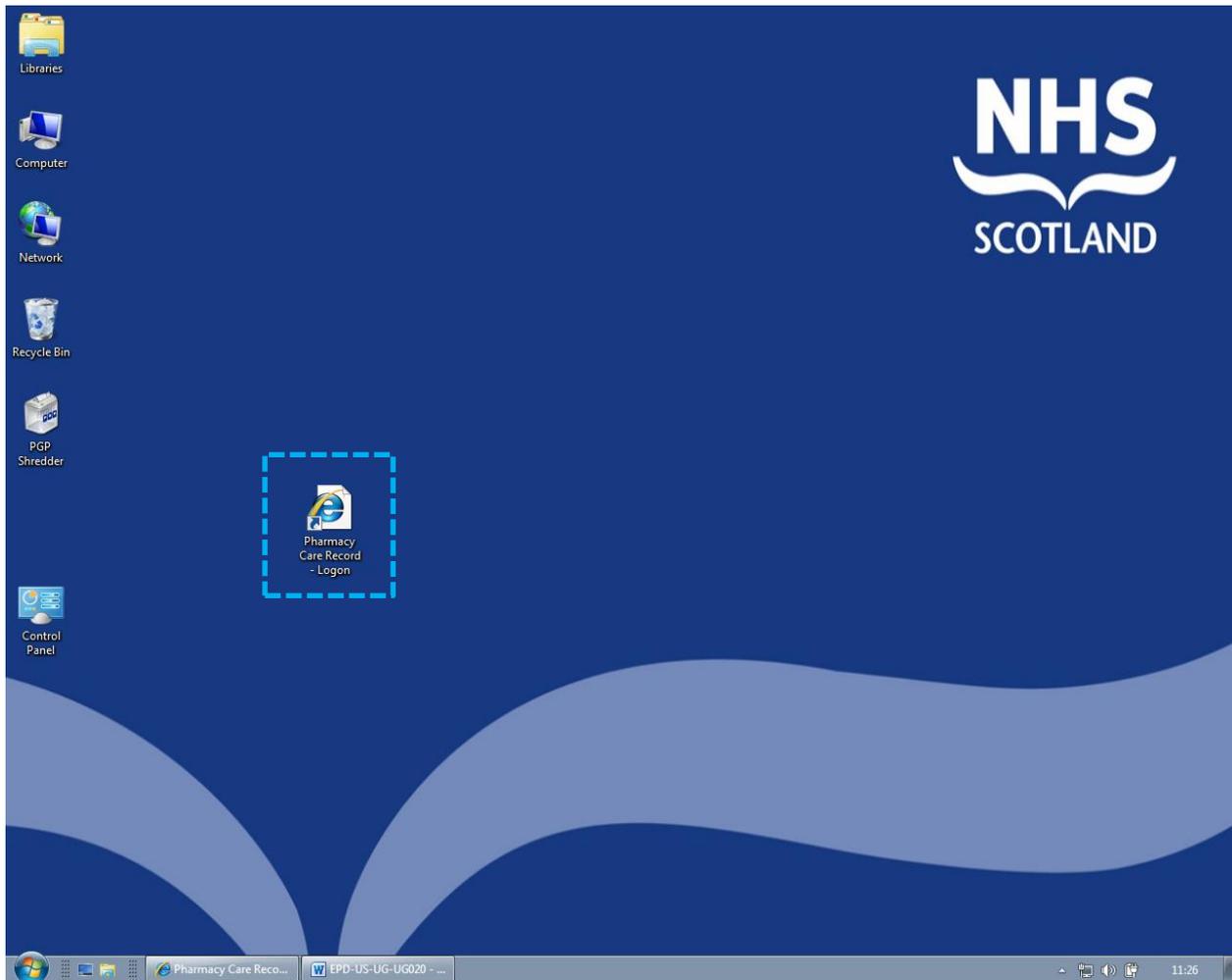


Figure 9-12: PCR Icon on Desktop

## 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 9-13).

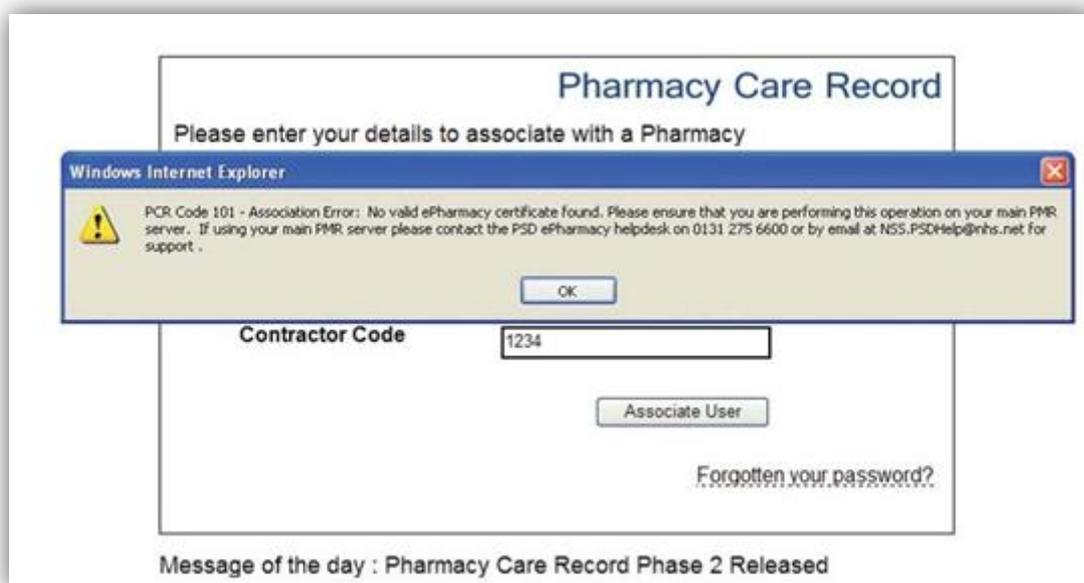


Figure 9-13: Error message if ePharmacy Certificate not present

## 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 9-13) then you may be able to resolve the issue by adding the PCR Association website to your list of trusted websites.



Figure 9-14: 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 9-15)

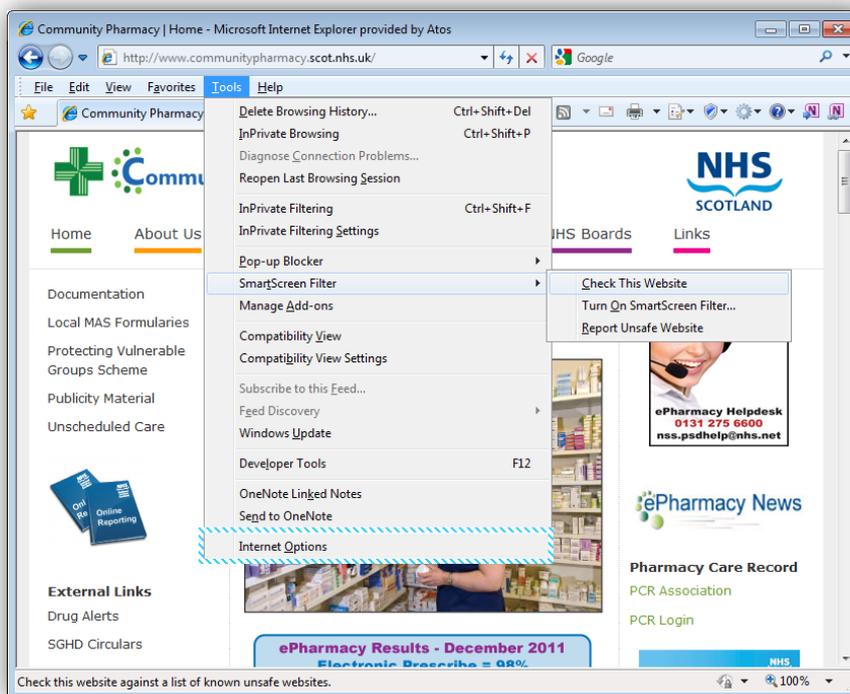


Figure 9-15: Tools > Internet Options (IE8)

- Select the security tab and then select the “Trusted sites” zone (Figure 9-16).

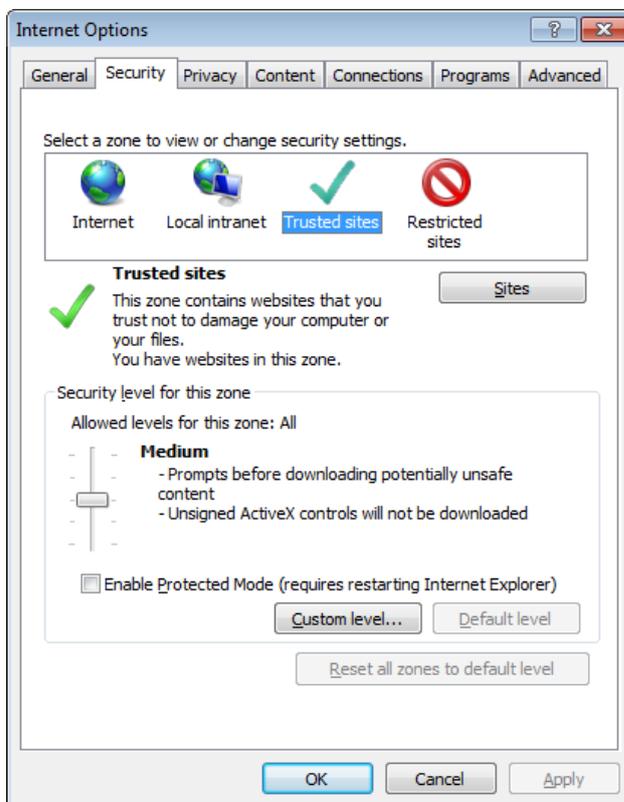


Figure 9-16: Trusted sites zone on security tab

- Click the “Sites” button, the “Trusted” sites dialogue is shown (Figure 9-17)



Figure 9-17: 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 9-17).
- 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> 777777777
<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>
---	---

## 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	
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. 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>
---	--

## 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