

Pharmacy Care Record

User Guide

for version 9.2

Pharmacy



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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.

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Introduction

Pharmacy Care Record (PCR)

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

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

- Patient details
- Pharmaceutical care plans
- Care issues and care issue outcomes
- High risk medicine care risk assessments for Methotrexate, Lithium and Warfarin
- New medicine interventions
- Support tool assessments for Gluten-free and smoking cessation

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
- Pharmacy level reports
- External link to the MHRA [YellowCard](#) web portal

About this user guide

This user guide covers all versions of PCR up to and including version 9.2.

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

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

Some figures in this user guide show screens from previous versions of PCR; These screens represent current version 9.2 layout and functions.

New in PCR version 9.2

Newly added information in this user guide includes:

- Minimum date value for data of birth field in in create/edit patient has been changed from "01-01-1753" to "01-01-1900" [Section 3.5.1]
- Post Code and CHI validation when creating or editing patients. [Section 3.5.1]
- Smoking Cessation Review Page now has a "Return to home page" link [8.7]
- Smoking cessation record contact - Products, "Mouth Spray" and "Oral film strips" added; No validation on contact date (date can be in the past); CO reading possible values are now 1-50. [section 8.12]
- Smoking cessation confirm quit date and record contact (CHI/date of birth validation) [section 8.6]
- Submit 4 week smoking cessation data (CHI/date of birth validation) [section 8.8]
- Submit 12 week smoking cessation data (CHI/date of birth validation) [section 8.10]
- Gluten free "annual health check" date field : error message shown if date entered in incorrect format. [Section 7.3]

Creating test patients

Test patients can be created to assist with PCR training. Test patients must be given one of the following CHI numbers:

- 5555555555
- 7777777777
- 9999999999

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

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

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

Test patient must not be added to the PMR. The PMR to PCR interface will not work with 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: Smoking Cessation Support Tool Assessment

Create and maintain smoking cessation Support Tool Assessment and associated care issues and care issue outcomes.

Section 9: Reports

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

Section 10: PMR interface to PCR

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

Appendix A: Error Messages

Full list of application error codes and their meaning

Appendix B: Create PCR shortcut on desktop

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

Appendix C: PCR association – common issues

Explains common issues with the PCR association process.

Appendix D: [Example test patients](#)

Three example test patients

Appendix E: [Test patient case studies](#)

Test patient case studies to help you learn about PCR.

1 Access and security

1.1 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 to access 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 using the update password page (Figure 1-1). The system automatically displays this page on initial login.



Figure 1-1: Update password page

Note: A 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).

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

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

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

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

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

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

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

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

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

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

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

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

1.3.1 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).

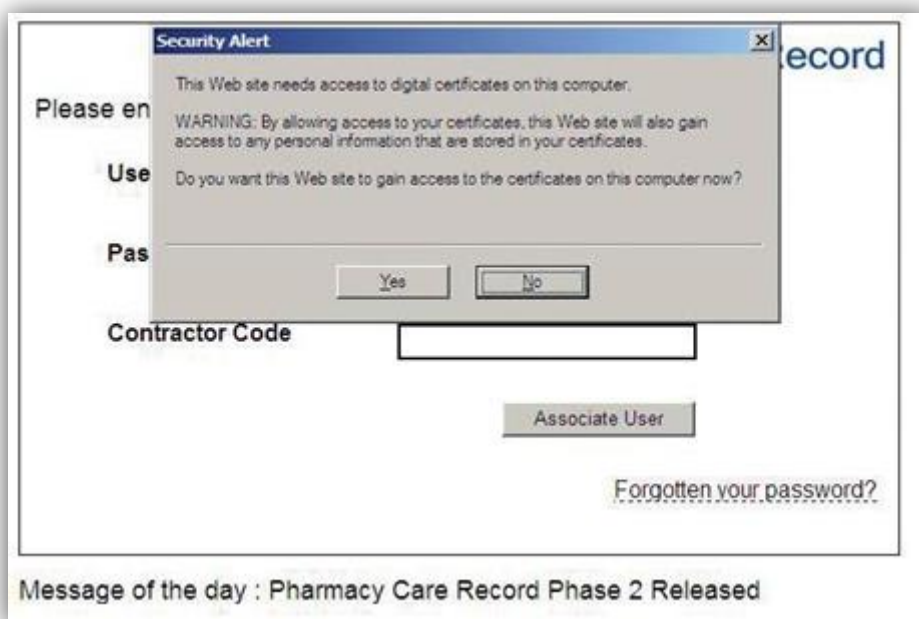


Figure 1-2: PCR association first security alert

Step 2 - Enter user credentials:

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

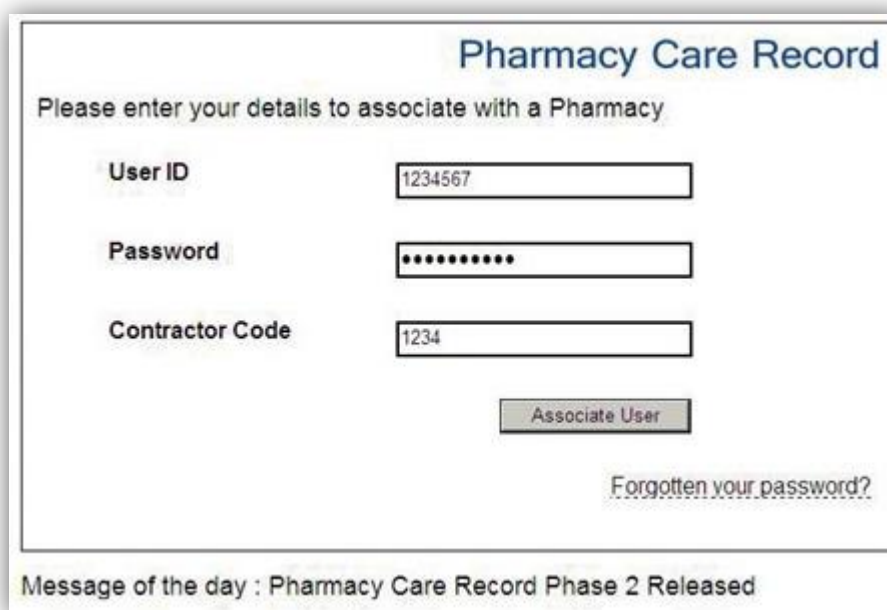


Figure 1-3: Associate User

Step 3: Accept second security alert

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

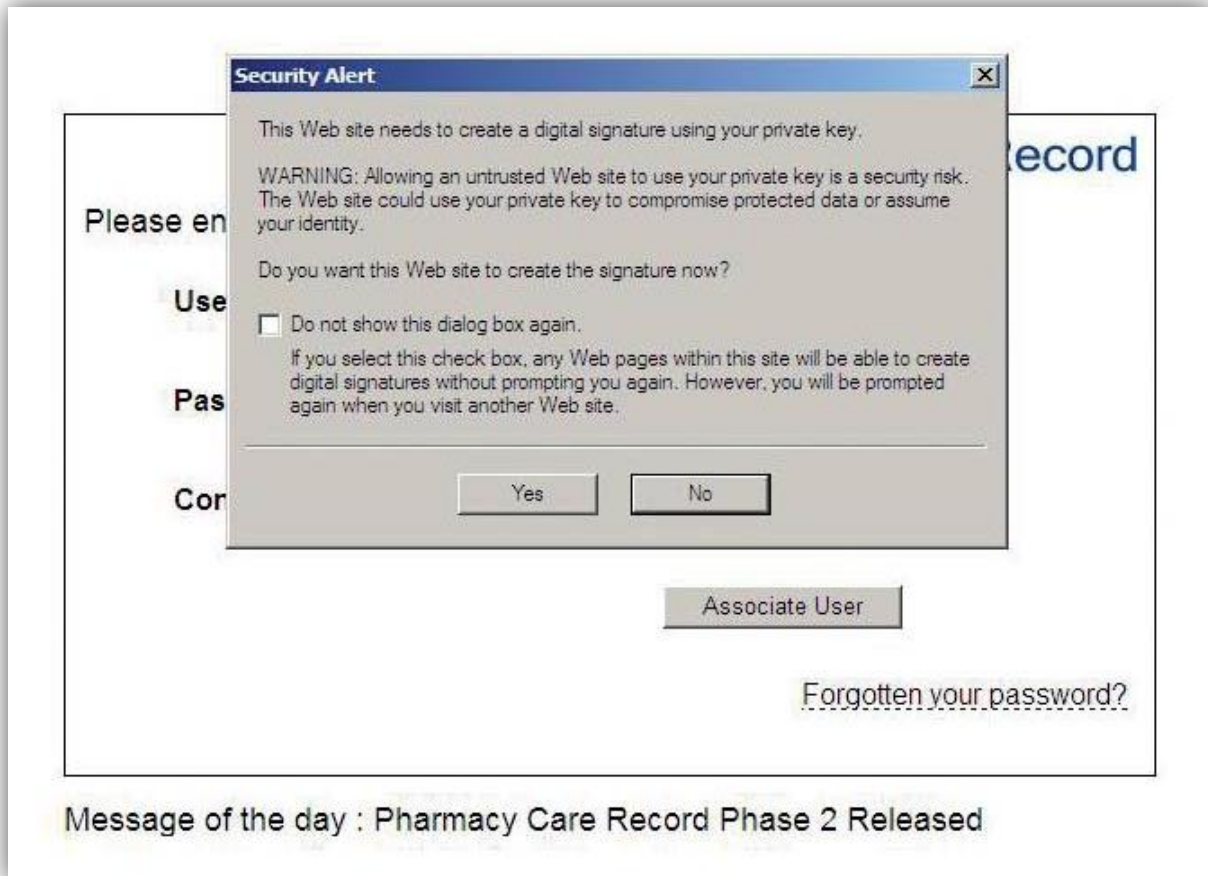


Figure 1-4: Association final security certificate

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

Associate User

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:

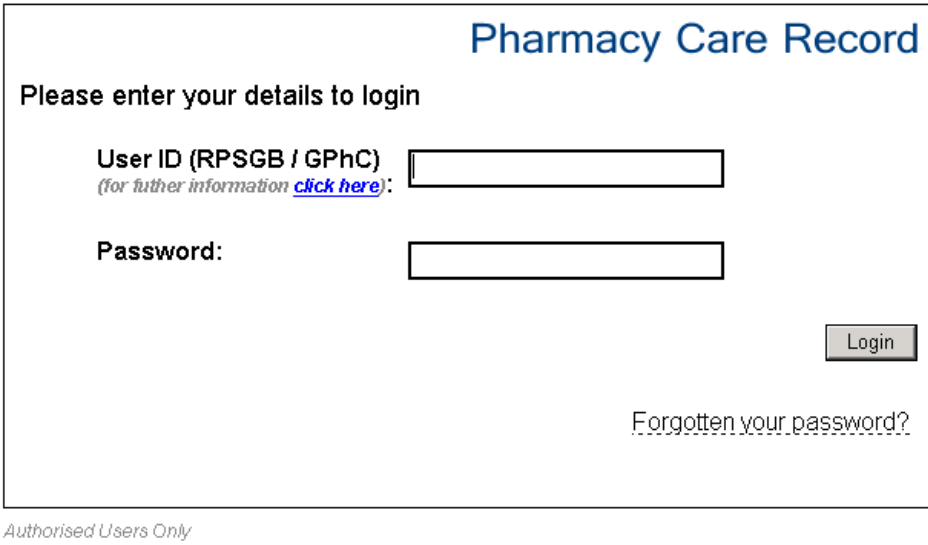
- By following the link on the association page, Figure 1-5
- From a desktop shortcut on any PC in the pharmacy where you are working.
- Via the following URL: <https://pcr.mhs.scot.nhs.uk/>
- A link on the Community Pharmacy website

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:

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



Pharmacy Care Record

Please enter your details to login

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

Password:

Login

[Forgotten your password?](#)

Authorised Users Only


Figure 1-6: Login page

- System displays the "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"/> 
	<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 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

Pharmacy Care Record **NHS**
 SCOTLAND

[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

Pharmacy Care Record **NHS**
 SCOTLAND

[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:	<div>▼</div>	
Answer:		

Question 6

Question 7

Question 8

Question 9

Question 10

Question 11

Question 12

Question 13

Question 14

Question 15

Question 16

Question 17

Question 18

Question 19

Question 20

Question	Answered	Required	Action
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

Pharmacy Care Record 

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

Manage Reset Password questions

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

Question:

Answer: ----- enter answer here

Add Answer ----- then click to add

Questions already answered

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

Answered Questions: 5, Required Questions: 5

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

Pharmacy Care Record **NHS**
SCOTLAND

[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:	<input type="text" value="Question 7"/>
Answer:	<input type="text"/>
<input type="button" value="Add Answer"/>	

Questions already answered

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

Answered Questions: 5, Required Questions: 5

Delete
question
link

Figure 1-12: 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)

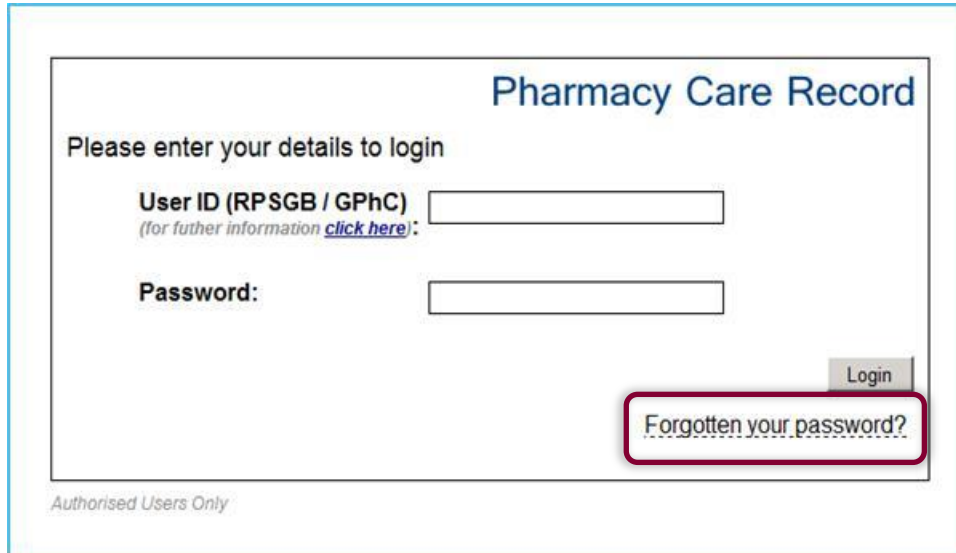


Figure 1-13 “forgotten your password” link

Step 2 - Enter user details:

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

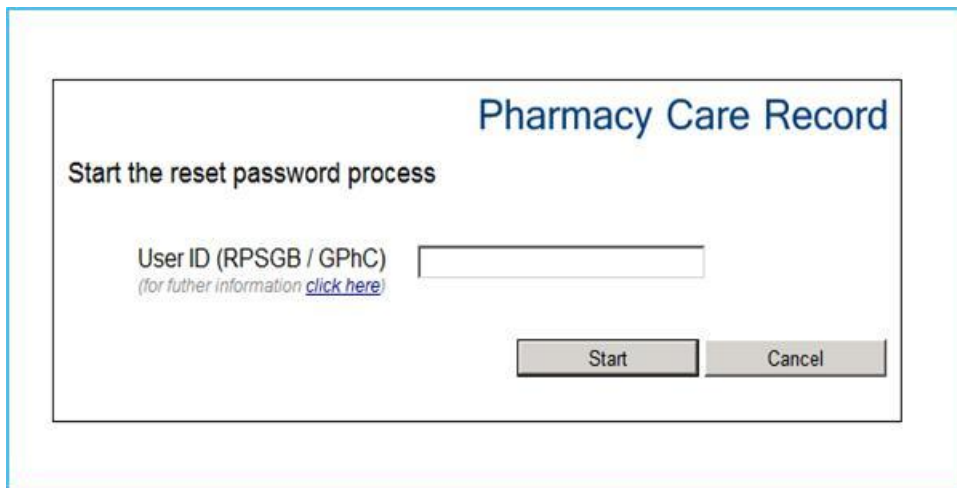
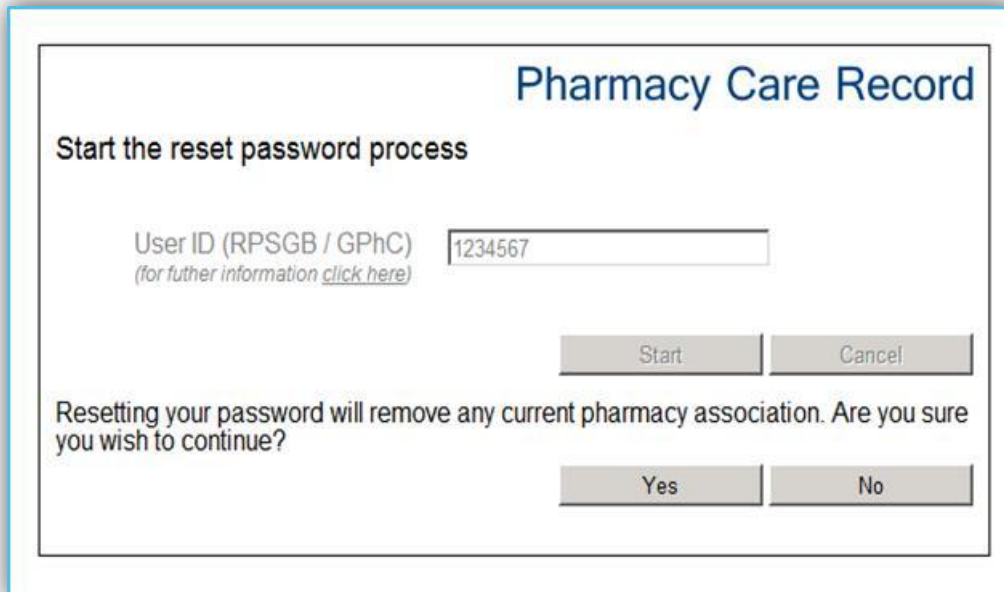


Figure 1-14: Start the reset password process

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).



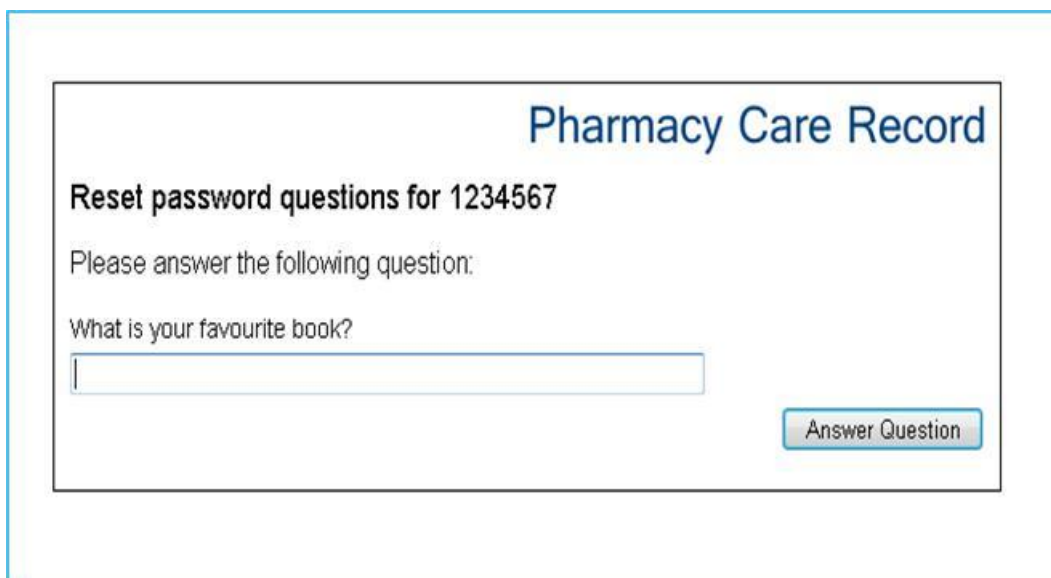
The screenshot shows a web interface titled "Pharmacy Care Record". Below the title, it says "Start the reset password process". There is a text input field labeled "User ID (RPSGB / GPhC)" with the value "1234567" entered. Below the field is a link "(for further information [click here](#))". To the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

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" in blue text at the top right. Below the title, on the left, is the text "Set password for testuser". Further down, there are two labels: "New password:" and "Confirm password:". To the right of each label is a white rectangular input box. At the bottom right of the form is a grey button with the text "Set Password" in black.

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.

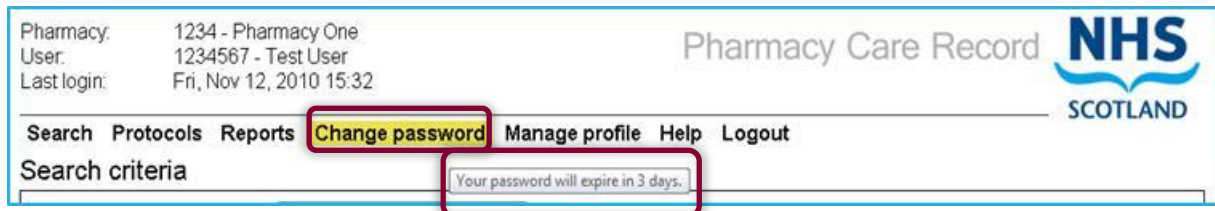


Figure 1-18: Expiring password warning

1.12 Last login date and time

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

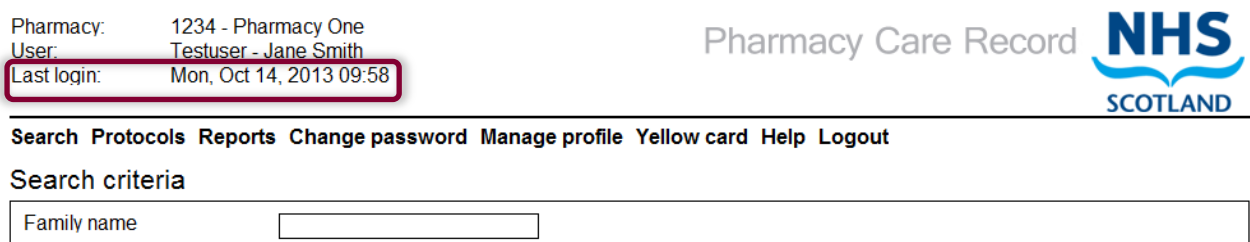


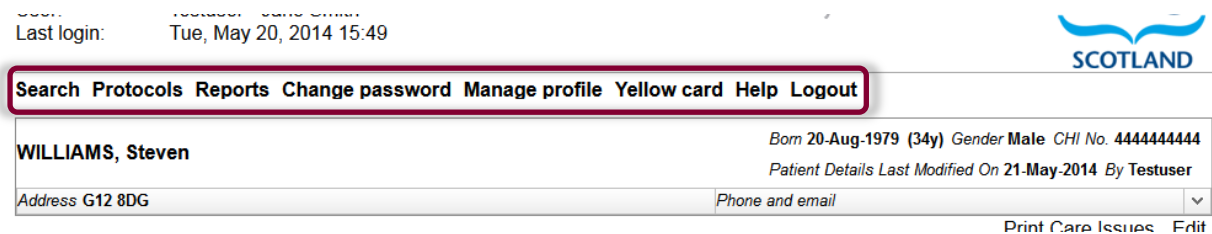
Figure 1-19 Last login date and time

Note: Please, inform the ePharmacy helpdesk by phone (0131 275 6600) or email (nss.psdhelp@nhs.net) 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.



Search Protocols Reports Change password Manage profile Yellow card Help Logout

WILLIAMS, Steven Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
 Patient Details Last Modified On 21-May-2014 By Testuser
 Address G12 8DG Phone and email

Print Care Issues Edit

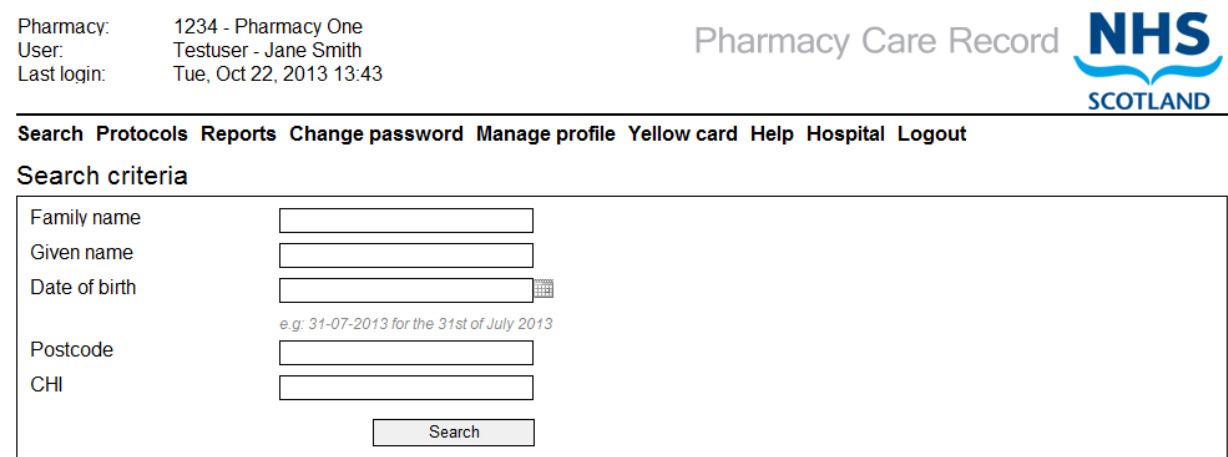
Figure 2-1: PCR high level menu

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 NHS SCOTLAND

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

Search criteria

Family name
 Given name
 Date of birth
 e.g: 31-07-2013 for the 31st of July 2013
 Postcode
 CHI

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 Protocols

The “Protocols” menu is intended to be used to list the CMS disease protocols (Figure 2-3: Protocols.).

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

Pharmacy Care Record **NHS** SCOTLAND

Search **Protocols** Reports Change password Help Logout

Protocols

Title
Angina Protocol
Asthma Protocol
Chronic Pain Protocol
COPD Protocol
Diabetes Protocol
Epilepsy Protocol
Heart Failure Protocol
Hyperlipidaemia Protocol
Hypertension Protocol
Hyperthyroidism Protocol
Osteoporosis Protocol
Parkinsons Disease Protocol
Rheumatoid Arthritis Protocol

Figure 2-3: Protocols

Note: At present there are no disease protocols associated with the links on the protocols page.

2.2.4 Reports

Select the “Reports” menu to view a list of reports available to the Pharmacy. Reports are explained in section 9 of this guide.

2.2.5 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 **NHS** SCOTLAND

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

Change password

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

Figure 2-4: Change password page

The change password function can be used at any time.

2.2.6 Manage profile

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

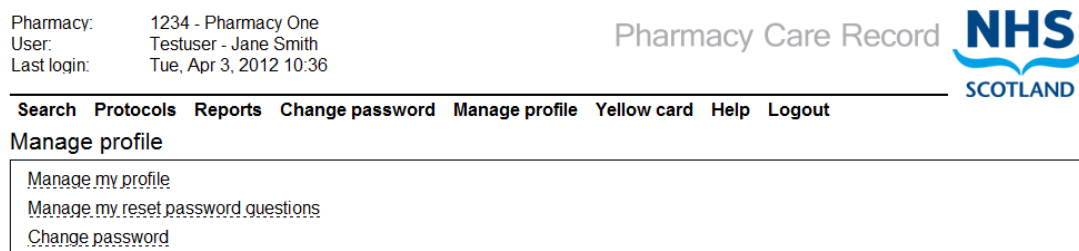


Figure 2-5: available options on "Manage profile" page

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)

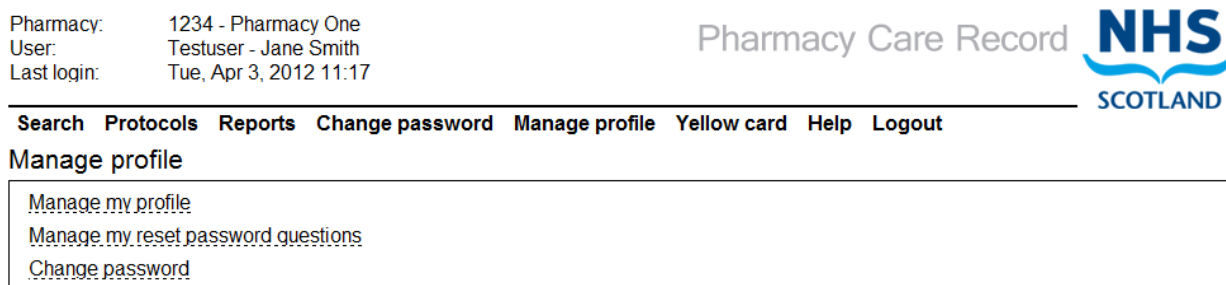


Figure 2-6: Manage profile options

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

Testuser

Title

Given Name

Jane*

Middle Name/Initial

Family Name

Smith*

Email Address

Display

Jane Smith*

Save

Cancel

Figure 2-7: 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

2.2.8 Yellow Card

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

YellowCard
Helping to make medicines safer

Enter Keyword(s) to Search

[A](#) [A](#) [A](#) [Login](#) **MHRA**

[Home](#) [The Yellow Card Scheme](#) [FAQs](#) [Further Information](#) [Downloadable Information](#)

[Contact Us](#)

Welcome to the on-line reporting site for the Yellow Card Scheme

You can report suspected side effects (also known as adverse drug reactions) to a medicine, vaccine, herbal or complementary remedy by clicking "Report Side Effect" below.

The Yellow Card Scheme, run by the MHRA and the Commission on Human Medicines, is used to collect information from both health professionals and the general public on suspected side effects.

Report Side Effect

Already Registered?

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

Email Address:

Password:

[Forgotten your Password?](#)

Register

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

Click [here](#) to stay connected with the MHRA

Important information about side effects

All medicines can cause side effects. Some may not yet be known so that's why it's important for people to report to the Yellow Card Scheme. Many side effects are mild, but some can be serious and even life-threatening. Others appear after taking a medicine for a long time or even after stopping a medicine.


It is important for people to report as these are used to identify side effects and other problems which might not have been known about before. If a new side effect is found the MHRA will review the way that the medicine can be used and the warnings.

Figure 2-8: MHRA YellowCard website

2.2.9 Help

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

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

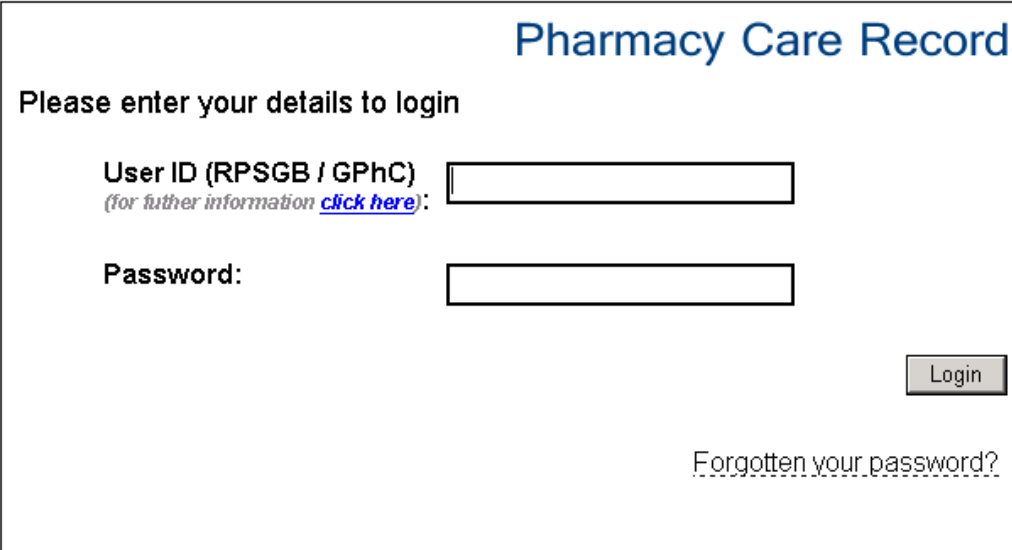
Contact Details	Please contact us at: Tel: 0131 275 6600 or email us : nss.psdhelp@nhs.net
User Guide	View Guide This PCR User Guide is in a format called PDF. If you cannot open the help guide please contact either your pharmacy system supplier or IT support. Alternatively if your system allows, a viewer (Adobe Acrobat Reader) can be downloaded and installed onto most PCs. Click here 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.

2.2.11 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 web page titled "Pharmacy Care Record" in blue text at the top right. Below the title, the text "Please enter your details to login" is displayed. There are two input fields: the first is labeled "User ID (RPSGB / GPhC)" with a subtext "(for further information [click here](#)):" and the second is labeled "Password:". To the right of the password field is a "Login" button. Below the login button is a link that says "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

Pharmacy Care Record 

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

3.2 Using the search function

To search for a patient:

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

3.2.1 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

Pharmacy Care Record 

[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" 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

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	View

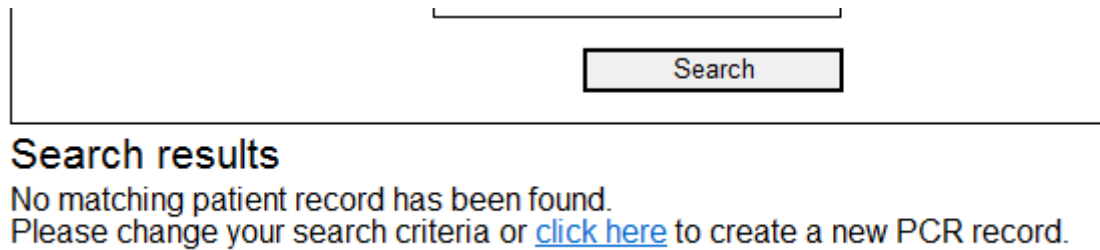
Figure 3-2: Search results list

3.2.2 If the search is not successful

- A Message will be displayed below the "Search criteria" form advising that "No matching patient records have been found" (Figure 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.

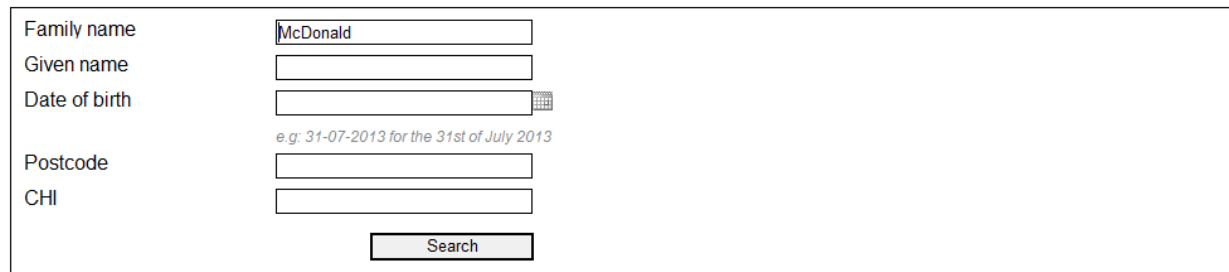
Figure 3-3: No matching patient records found


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

Pharmacy Care Record **NHS**
SCOTLAND

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

Search criteria



Family name
Given name
Date of birth 
e.g: 31-07-2013 for the 31st of July 2013
Postcode
CHI

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

3.3 Manually create a patient record

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

- a patient search has completed and no records have been found (Figure 3-4)
- a patient search has completed and the searched for patient is not listed (Figure 3-4)
- **Note:** [Section 10 of this User Guide details the process for creating a patient record using the patient interface functionality between your PMR application and PCR.]

3.3.1 Where the CHI Number is known

To manually create a patient record:

- Select the “Click here” link from the Search criteria / search results page, (The “Patient Details” input page is displayed, Figure 3-5)

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

Pharmacy Care Record **NHS**
 SCOTLAND

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

Patient Details

Patient Demographics

* Means a field requires data

CHI *

Given name Mandatory for CHI search *

Preferred name

Date of birth Mandatory for CHI search *

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

Title

Family name *

Gender

Patient Deceased ☐

Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode Mandatory for CHI search

Contact Details

Home phone number

Mobile phone number

Work phone number

Email address

Figure 3-5: Patient details

- Enter the patient details
- Select the “Save” button*, the patient home will be displayed (Figure 3-10). A new patient will be created in PCR.

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

The minimum date value for data of birth field is “01-01-1900”.

Validation

Postcode – An error message: “Enter valid Postcode” will be displayed if a post code is entered without a single separating space between the outward and inward part of the postcode. For example:

- “G1 1DQ” (Valid)
- “G11DQ” (Not Valid)



The screenshot shows a form with a label 'Postcode' and a text input field containing 'G11DQ'. Below the input field, a red error message reads: 'Enter valid Postcode.'

CHI – An error message will display if the CHI number does not match either the date of birth (first six characters of CHI) or gender (9th character of CHI odd number for male and even number for female).

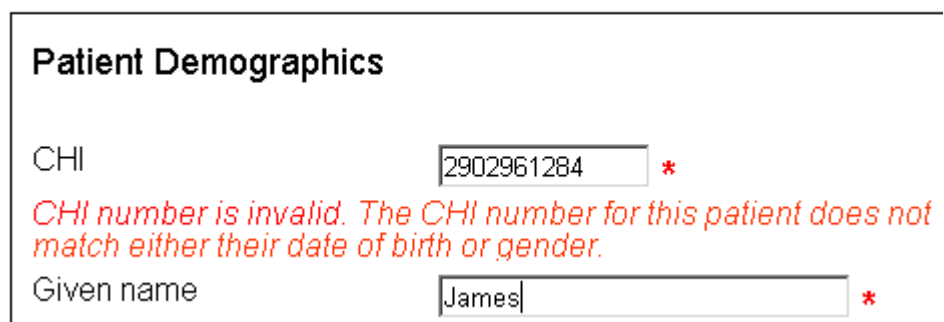
The error message text is:

“CHI number is invalid. The CHI number for this patient does not match either their date of birth or gender.”

It is however still possible to save a CHI that fails this validation.

Test CHI numbers: 5555555555, 7777777777, and 9999999999 are exempt from date of birth and gender validation checks.'

Patient Details



The screenshot shows the 'Patient Demographics' section of a form. It contains two fields with validation errors:

- CHI:** The input field contains '2902961284'. To the right of the field is a red asterisk (*). Below the field, a red error message reads: 'CHI number is invalid. The CHI number for this patient does not match either their date of birth or gender.'
- Given name:** The input field contains 'James'. To the right of the field is a red asterisk (*).

3.3.2 Where the CHI Number is not known

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

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

To search for a CHI Number:

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

The default state of the patient details page highlights what information is mandatory for CHI search, Figure 3-6. (using greyed-out text "Mandatory for CHI search" within the text input boxes)

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

Pharmacy Care Record **NHS**
 SCOTLAND

Search Protocols Reports Change password Manage profile Yellow card Help Logout

Patient Details

Patient Demographics

CHI *

Given name *

Preferred name

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

Title

Family name *

Gender ▼

Patient Deceased ☐

Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode

Contact Details

Home phone number

Mobile phone number

Work phone number

Email address

Figure 3-6: Highlighted mandatory for CHI search

- Enter all information that is "Mandatory for CHI",
 - Given Name
 - Family Name
 - Date of Birth
 - Postcode
- Click the "Find CHI" button
 - If a unique match is found on the CHI system the CHI number will be populated, Figure 3-7.

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

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

Pharmacy Care Record **NHS**
SCOTLAND

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

Patient Details

Patient Demographics * Means a field requires data

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

Patient Address

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

Contact Details

Home phone number	<input type="text"/>
Mobile phone number	<input type="text"/>
Work phone number	<input type="text"/>
Email address	<input type="text"/>

Figure 3-7: Unique Match Found

- If more than one match is found on the CHI system a message will display advising to review search criteria, Figure 3-8

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

Pharmacy Care Record **NHS**
SCOTLAND

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

Patient Details

Patient Demographics * Means a field requires data

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

Patient Address

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

More than one match found

Please review your search criteria.

Figure 3-8: More than one match found

- If no match is found on the CHI system an error message will display advising to alter search criteria, Figure 3-9.

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

Pharmacy Care Record **NHS SCOTLAND**

Search Protocols Reports Change password Manage profile Yellow card Help Logout

Patient Details

Patient Demographics

CHI * Find CHI Title

Given name Nomatch * Family name Williams *

Preferred name

Date of birth 20-08-1979 * Gender Male

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

Patient Address

Address 1

Address 2

Address 3

Address 4

Address 5

Postcode Pa3 3bb

No match found

Please review your search criteria.

OK

Save Cancel

Figure 3-9: No match found

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

3.4 View Patient details

Once a patient has been selected or newly created via the search process the patient home is displayed.

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

Pharmacy Care Record 

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

WILLIAMS, Steven Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
Patient Details Last Modified On 21-May-2014 By Testuser
 Address G12 8DG Phone and email v

[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 <table style="width: 100%;"> <tr> <td style="width: 35%;">Diagnosed coeliac (historical)</td> <td>Not Recorded</td> </tr> <tr> <td>Gluten-free diet</td> <td>Not Recorded</td> </tr> <tr> <td>Complex dispensing patient</td> <td>Not Recorded</td> </tr> </table> Dispositions <table style="width: 100%;"> <tr> <td style="width: 35%;">Patient has a</td> <td>Compromised oral route of administration</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Physical Impairment</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Visual Impairment</td> <td>Not Recorded</td> </tr> </table> Organ function <table style="width: 100%;"> <tr> <td style="width: 35%;">Patient has an impaired/compromised</td> <td>Hepatic Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Renal Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Lung Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Immune Status</td> <td>Not Recorded</td> </tr> </table> Maternal <table style="width: 100%;"> <tr> <td style="width: 35%;">Patient is</td> <td>Pregnant</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Breast Feeding</td> <td>Not Recorded</td> </tr> </table> Pharmaceutical Care Plan Priority Not Recorded <div style="text-align: right;">Patient Profile Last Modified: 21-May-2014 by Testuser</div>				Diagnosed coeliac (historical)	Not Recorded	Gluten-free diet	Not Recorded	Complex dispensing patient	Not Recorded	Patient has a	Compromised oral route of administration	Not Recorded		Physical Impairment	Not Recorded		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	Patient is	Pregnant	Not Recorded		Breast Feeding	Not Recorded
Diagnosed coeliac (historical)	Not Recorded																																			
Gluten-free diet	Not Recorded																																			
Complex dispensing patient	Not Recorded																																			
Patient has a	Compromised oral route of administration	Not Recorded																																		
	Physical Impairment	Not Recorded																																		
	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																																		
Patient is	Pregnant	Not Recorded																																		
	Breast Feeding	Not Recorded																																		
Review/Edit																																				
Pharmaceutical Care Risk Assessment <table style="width: 100%;"> <thead> <tr> <th style="width: 30%;">Review date</th> <th style="width: 30%;">Review user</th> <th style="width: 40%;">Care issues?</th> </tr> </thead> <tbody> <tr> <td colspan="3">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;">Add</div>				Review date	Review user	Care issues?	No records to display.																													
Review date	Review user	Care issues?																																		
No records to display.																																				
Care Issues <table style="width: 100%;"> <thead> <tr> <th style="width: 30%;">Care issue</th> <th style="width: 30%;">Care issue type</th> <th style="width: 20%;">Earliest review by</th> <th style="width: 20%;">Last modified on</th> </tr> </thead> <tbody> <tr> <td colspan="4">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;">[0 of 0] Review</div>				Care issue	Care issue type	Earliest review by	Last modified on	No records to display.																												
Care issue	Care issue type	Earliest review by	Last modified on																																	
No records to display.																																				
Medication <table style="width: 100%;"> <thead> <tr> <th style="width: 15%;">Name</th> <th style="width: 15%;">Last dispensed on</th> <th style="width: 15%;">Service</th> <th style="width: 15%;">Indication</th> <th style="width: 15%;">Modified date</th> <th style="width: 15%;">Modified by</th> <th style="width: 10%;">Imported</th> </tr> </thead> <tbody> <tr> <td colspan="7">No records to display.</td> </tr> </tbody> </table> <div style="text-align: right;">[0 of 0] Review</div>				Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported	No records to display.																									
Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported																														
No records to display.																																				

Figure 3-10: Patient Home page

It may be required to "scroll up/down" to see all sections of this page.

Select the arrow on the right hand side of the patient home page to show/hide the patient address and contact details. (Figure 3-11).

By Testuser

Issues Edit

{Show}

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

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*

Usual address
 3 Appleton Parkway
 Livingston
 West Lothian
 UK
 EH54 7EZ

Home 01506 000-000
Work
Mobile 0777 000-000
Email JohnSmith@home.com

{Hide}

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

Pharmaceutical Care Plan High Risk Medicine Assessments New Medicine Interventions

Patient Profile [Show less detail](#)

Figure 3-11: Show/hide patient address and contact details

3.5 Edit Patient Details

To edit patient details

- Select the "Edit" link located at the top right of the patient profile on the patient home screen. This will display the patient details screen. (Figure 3-12)

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

Pharmacy Care Record **NHS**
 SCOTLAND

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

Patient Details

* Means a field requires data

Patient Demographics	
CHI <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="0102031231"/> *	Title <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="Mr"/>
Given name <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="Johnathan"/> *	Family name <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="Smith"/> *
Preferred name <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="John"/>	Gender <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="Male"/>
Date of birth <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="03-02-2001"/> *	Patient Deceased <input style="width: 50px;" type="checkbox"/>
e.g. 01-05-2010 for the 1st of May 2010	
Patient Address	Contact Details
Address 1 <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="3 Appleton Parkway"/>	Home phone number <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="01506 000-000"/>
Address 2 <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="Livingston"/>	Mobile phone number <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="0777 000-000"/>
Address 3 <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="West Lothian"/>	Work phone number <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text"/>
Address 4 <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="UK"/>	Email address <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="JohnSmith@home.com"/>
Address 5 <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text"/>	
Postcode <input style="border-bottom: 1px solid black; border-top: 1px solid black; border-left: 1px solid black; border-right: 1px solid black;" type="text" value="EH54 7EZ"/>	

Figure 3-12: Patient Details

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

Mandatory information is highlighted with :*. (The "Find CHI" button is not displayed on the edit page.)

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

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 (responsible for Pharmaceutical Care Plan)
- Additional Details (of named pharmacist)
- General Health
- Medical Conditions
- Allergies and sensitivities

Diagnosed coeliac (Historical)

Gluten-free diet

Complex dispensing patient

- Is the patient a complex dispensing patient?

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

Patient Factors

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

Pharmaceutical Care Plan Priority

- PCP Priority
- Notes

Initial assessment complete

- Initial assessment complete (checkbox)

Named Pharmacist responsible for Pharmaceutical Care Plan

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

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)

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

Gluten-free diet

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

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

Complex dispensing patient

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

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

Patient Factors: Dispositions, Organ function, Maternal

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

Pharmaceutical care plan priority

PCP Priority: Not Recorded ▼

Notes

Initial assessment complete: ☐

Save 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).

maternal

Patient is Pregnant Not Applicable Detail available

Breast Feeding Not Applicable Detail available

Pharmaceutical Care Plan Priority Not Recorded Detail available

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

[Review/Edit](#)

Pharmaceutical Care Risk Assessment

Review date	Review user	Care issues?	
05-May-2005	InitialUser	No	View
04-Apr-2004	InitialUser	No	View
03-Mar-2003	InitialUser	No	View
02-Feb-2002	InitialUser	No	View
01-Jan-2001	InitialUser	No	View

[Add](#)

Care Issues

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

Named pharmacist responsible for pharmaceutical care plan	
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"/>
Patient profile	
General health:	<input style="width: 90%;" type="text" value="Poor health"/>
Medical conditions:	<input style="width: 90%;" type="text" value="Asthma"/>
Allergies and sensitivities:	<input style="width: 90%;" type="text" value="allergic rhinitis"/>
Patient factors : Dispositions	
Compromised oral route of administration:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input 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"/>
Patient factors : Organ function	
Hepatic function:	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Applicable <input checked="" type="radio"/> Not Recorded
Notes	<input 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"/>
Lung 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													
Patient Profile Show less detail ^																	
Named Pharmacist	Pharmacist A																
Additional Information	Pharmacist A (Additional information)																
General Health	Poor Health																
Medical Conditions	Asthma																
Allergies and Sensitivities	Allergic																
Diagnosed Coeliac	Yes																
Complex dispensing patient	Yes																
Dispositions	<table border="0"> <tr> <td>Patient has a</td> <td>Compromised oral route of administration</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Physical Impairment</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Visual Impairment</td> <td>Not Recorded</td> </tr> </table>					Patient has a	Compromised oral route of administration	Not Recorded		Physical Impairment	Not Recorded		Visual Impairment	Not Recorded			
Patient has a	Compromised oral route of administration	Not Recorded															
	Physical Impairment	Not Recorded															
	Visual Impairment	Not Recorded															
Organ function	<table border="0"> <tr> <td>Patient has an impaired/compromised</td> <td>Hepatic Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Renal Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Lung Function</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Immune Status</td> <td>Not Recorded</td> </tr> </table>					Patient has an impaired/compromised	Hepatic Function	Not Recorded		Renal Function	Not Recorded		Lung Function	Not Recorded		Immune Status	Not Recorded
Patient has an impaired/compromised	Hepatic Function	Not Recorded															
	Renal Function	Not Recorded															
	Lung Function	Not Recorded															
	Immune Status	Not Recorded															
Maternal	<table border="0"> <tr> <td>Patient is</td> <td>Pregnant</td> <td>Not Recorded</td> </tr> <tr> <td></td> <td>Breast Feeding</td> <td>Not Recorded</td> </tr> </table>					Patient is	Pregnant	Not Recorded		Breast Feeding	Not Recorded						
Patient is	Pregnant	Not Recorded															
	Breast Feeding	Not Recorded															
Pharmaceutical Care Plan Priority	Medium Priority																
Initial assessment completed on	25-Feb-2013 by Ork5																
Patient Profile Last Modified: 25-Feb-2013 by Ork5																	
Review/Edit																	

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	
Patient Profile Show more detail v					
Named Pharmacist	Pharmacist A				
General Health	Poor Health				
Medical Conditions	Asthma				
Allergies and Sensitivities	Allergic				
Diagnosed Coeliac	Yes				
Complex dispensing patient	Yes				
Pharmaceutical Care Plan Priority	Medium Priority				
Initial assessment completed on	25-Feb-2013 by Ork5				
Patient Profile Last Modified: 25-Feb-2013 by Ork5					
Review/Edit					

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	View
04-Apr-2004	InitialUser	No	View
03-Mar-2003	InitialUser	No	View
02-Feb-2002	InitialUser	No	View
01-Jan-2001	InitialUser	No	View

Add

Figure 4-7: Add pharmaceutical care risk assesement

- 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](#)

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

Care Risk Assessment		
Pharmaceutical care issues which affect the patient:		
Care issue with the appropriateness of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the formulation of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Side effect/s with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Problem/s with concordance?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Care issue in relation to polypharmacy?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Pharmacokinetic risk factors?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Pharmacodynamic risk factors?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Disease risk factor?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Taking one or more black triangle medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Duplication of medication?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
Summary:		
Are there any pharmaceutical care issues of note?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded	<input type="text"/>
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

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 Selection required.	
Care issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded Selection required.	
Care issue with the contraindications?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded Selection required.	
Drug interaction with one or more medicines?	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Not Recorded Selection required.	
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	View
04-Apr-2004	InitialUser	No	View
03-Mar-2003	InitialUser	No	View
02-Feb-2002	InitialUser	No	View
01-Jan-2001	InitialUser	No	View

[Add](#)

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](#)

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

Care Risk Assessment

Pharmaceutical care issues which affect the patient:

Care issue with the appropriateness of the medicine/s?	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

Summary

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	View
> Increased Asthma Attacks	Standard		03-Dec-2008	View
> Medication Use Review	Standard		03-Dec-2008	View
> Allergy Review	Standard		03-Dec-2008	View

[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 

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

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

[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

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

Care Issue

Description of care issue *

* Means a field requires data

Figure 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

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

Care Issue

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

[Edit](#)

Care Issue Outcome

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

[Add](#)

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

Figure 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

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

Care Issue Outcome

* Means a field requires data

Desired Outcome *

Action

Action By

Response

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

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

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

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

Care Issue

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

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)

Organ function	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
Maternal		
Patient is	Pregnant	Not Recorded
	Breast Feeding	Not Recorded
Pharmaceutical Care Plan Priority	Medium Priority	
Initial assessment completed on	25-Feb-2013 by Ork5	
Patient Profile Last Modified: 25-Feb-2013 by Ork5		

[Review/Edit](#)

Pharmaceutical Care Risk Assessment

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

[Add](#)

Care Issues

Care issue	Care issue type	Earliest review by	Last modified on
> Poor inhaler technique	Standard		26-Feb-2013 View

[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 View
> Poor inhaler technique	Standard	20-Apr-2012	13-Apr-2012 View
> Increased Asthma Attacks	Standard		03-Dec-2008 View
> Medication Use Review	Standard		03-Dec-2008 View

[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	View
>	Salbutamol 100mcg		CMS	Respiration maintenance	12-Apr-2012	dbo	True	View
>	Amoxicillin - 125mg in 5 ml suspension		CMS	Infection control	12-Apr-2012	dbo	True	View
>	Oxygen - 100% respiratory		CMS	Respiration maintenance	12-Apr-2012	dbo	True	View

[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

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SMITH, Johnathan (Mr)		<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>	
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	View
>	Salbutamol 100mcg		CMS	Respiration maintenance	18-Oct-2013	dbo	True	View
>	Amoxicillin - 125mg in 5 ml suspension		CMS	Infection control	18-Oct-2013	dbo	True	View
>	Oxygen - 100% respiratory		CMS	Respiration maintenance	18-Oct-2013	dbo	True	View
>	Aspirin - 100mg		CMS	Pain relief	18-Oct-2013	dbo	True	View

[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

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

Medication * Means a field requires data

Name *

Service

Indication

Last dispensed on

Imported

Figure 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

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

Medication

Name	Last dispensed on	Service	Indication	Modified date	Modified by	Imported
aspirin 300mg		CMS		12-Apr-2012	Testuser	False
Quantity	Direction			Dispensed on	Imported	
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)

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

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

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

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

Pharmaceutical Care Plan High Risk Medicine Assessments New Medicine Interventions

High risk medicine care risk assessment

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

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

Figure 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)

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

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

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

High risk medicine care risk assessment

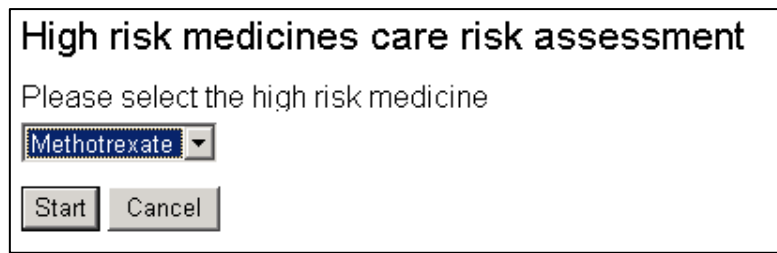
Please select the high risk medicine

Methotrexate ▼

[Start](#) [Cancel](#)

Figure 5-2: Drug Selection

Note: "Methotrexate" used in this User Guide example.



High risk medicines care risk assessment

Please select the high risk medicine

Methotrexate ▼

Start Cancel

Figure 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


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

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

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

Concordance

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

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

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

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

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

Actions:

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

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

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

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

Advise the patient to carry and use the methotrexate booklet.

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

Next - Interactions & precautions
Save & Review

[return to Methotrexate Review Page](#)

Figure 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

Required

When
as a
week
follow
the
Acti
C
ta
If
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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)

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

Pharmacy Care Record



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WILLIAMS, Steven (Mr)

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

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

Address 5 Oakbank Avenue, Glasgow, G12 3NR

Phone and email

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

Interactions and precautions

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

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

Serious drug interactions include:

Acitretin and Sulfapyrazone

Chloramphenicol, co-trimoxazole, probenecid and trimethoprim

Consider the need for contraceptive and family planning advice.

Action:

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

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

[Back - Concordance](#)

[Next - Adverse reactions](#)

[Save & Review](#)

[return to Methotrexate Review Page](#)

Figure 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	

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

Adverse reactions : side effects and toxicity

Is the patient aware of the common side effects of methotrexate?	<input type="radio"/> Yes <input type="radio"/> No
Is the patient aware of the side effects that occur if they are having a reaction to methotrexate?	<input type="radio"/> Yes <input type="radio"/> No
Is the patient aware of what to do if they are suffering from these signs?	<input type="radio"/> Yes <input type="radio"/> No
Is the patient aware that adverse reactions should be reported?	<input type="radio"/> Yes <input type="radio"/> No

The most common side effects are:

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

Actions:

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

Ask the patient if they are experiencing any side effects.

Refer them to their GP if side effects appear severe.

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

Signs of methotrexate toxicity or intolerance are:

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

Actions:

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

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

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

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

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

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

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

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

Monitoring

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

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

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

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

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

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

weekly - fortnightly for those just started.

Actions:

Establish if the patient is receiving regular monitoring.

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

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

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

Encourage the patient to carry their methotrexate booklet.

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

[Back - Adverse reactions](#) [Save & Review](#)

[return to Methotrexate Review Page](#)

Figure 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. (See highlighted examples in concordance section).

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

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

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

Methotrexate high risk medicine care risk assessment summary

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

Concordance

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

Interactions and precautions

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

Adverse reactions : side effects and toxicity

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

Monitoring

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

Care issues associated with this assessment

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

[Add](#)

Assessment completion

Assessment complete	No
Assessment completed by	
Assessment completed on	
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 15-Feb-1945 (61y) Gender Male CHI No. 1111111111
 Patient Details Last Modified On 13-Apr-2012 By Testuser

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

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

Lithium high risk medicine care risk assessment summary

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

Concordance

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

Adverse reactions: side effects and toxicity

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

Interactions and precautions

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

Monitoring

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

[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		
Concordance		Adverse reactions: side effects and toxicity
Is the patient taking their Warfarin as prescribed?	Yes	+
Does the patient know what to do if they miss a dose?	Yes	+
Does the patient have the patient information and recording booklets and alert card and do they use them?	Yes	+
Interactions and precautions		
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?	Yes	+
Does the patient know that certain OTC medicines (e.g. ibuprofen or miconazole gel) and foods / alcohol can interact with Warfarin?	Yes	+
		Is the patient aware of the common side effects of Warfarin?
		Is the patient aware of the signs of over / under anticoagulation?
		Is the patient aware what might cause over-anticoagulation and how to avoid this happening?
		Is the patient aware of what to do if they are suffering from these signs?
		Is the patient aware to whom adverse reactions should be reported?
		Monitoring
		Has the patient had a recent blood test to check their INR?
Use + to add care issues for the specific question.		
<div> <div> Key messages: <ul style="list-style-type: none"> Always check for interacting medicines and manage accordingly i.e. more frequent INR monitoring and adjustment of dose of Warfarin if appropriate Check if the patient has been educated on Warfarin Check if the patient has Oral Anticoagulant Therapy Pack Check if the patient has a recent INR result </div> <div> Actions: <ul style="list-style-type: none"> Any pharmaceutical care issues, desired outcomes and actions to resolve the issues should be agreed with patient and recorded in their care plan. At each future dispensing: <ul style="list-style-type: none"> Check for monitoring and signs of toxicity Review and update any outstanding care issues in the care plan if appropriate </div> </div>		
Care issues associated with this assessment		
Care issue	Earliest review by	Last modified on
No records to display.		
Add		
Assessment completion		
Assessment complete	Yes	


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)

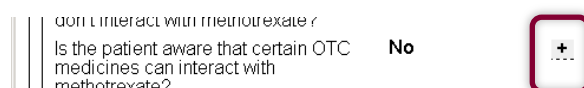


Figure 5-12: Add Care Issue / Care Issue Outcome link

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

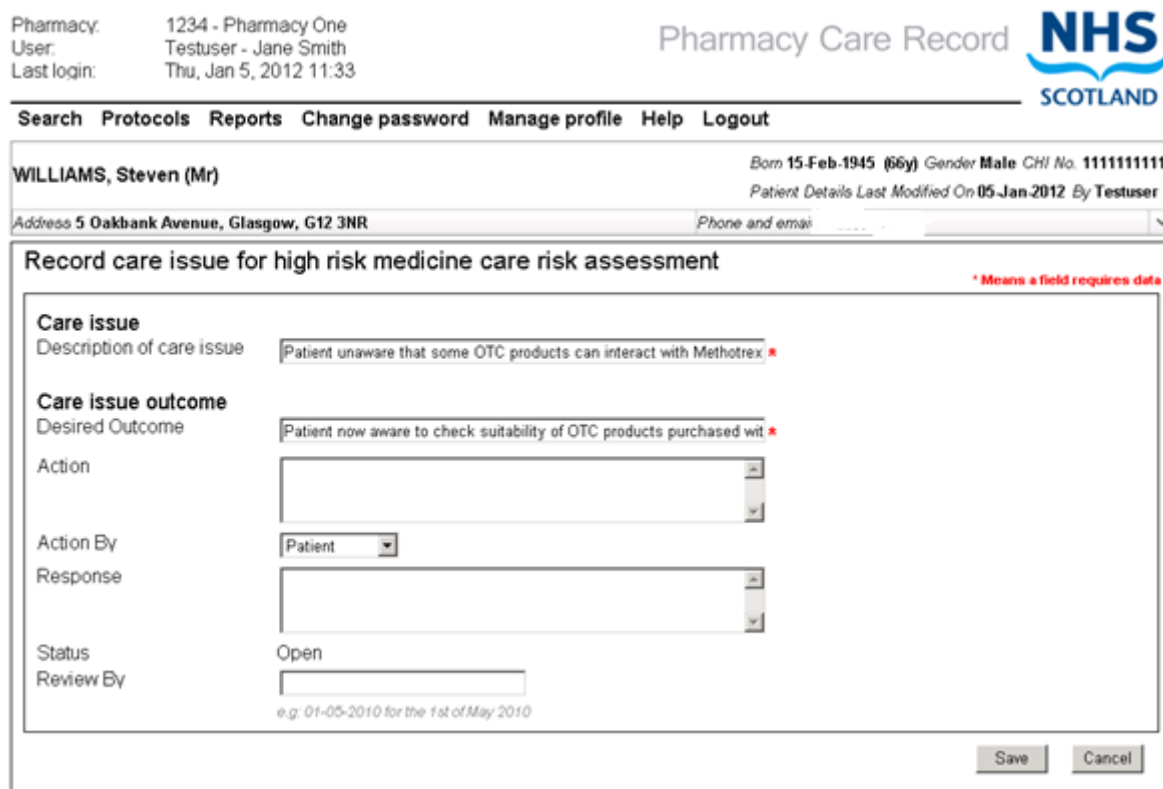


Figure 5-13: high risk medicines "Record care issue" screen

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.

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

Care issues associated with this assessment			
Care issue	Earliest review by	Last modified on	
> Patient unaware that some OTC products can interact with Methotrexate	25-Jan-2012	09-Jan-2012	View

[Add](#)

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

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

Care issue
 Description of care issue *

Care issue outcome
 Desired Outcome *

Action

Action By Patient

Response

Status Open

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

Save Cancel

Figure 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	View

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

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

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on	
> Patient unaware that some OTC products can interact with Methotrexate	11-Jan-2012	06-Jan-2012	View

[Add](#)

Assessment completion

Assessment complete	No
Assessment completed by	
Assessment completed on	
Complete assessment	

[return to Patient Home Page](#)

Figure 5-17: Assessment completion details for an "Open" assessment

Assessment completion

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

[return to Patient Home Page](#)

Figure 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

Pharmacy Care Record 

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

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

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

Type	Number of care issues	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Methotrexate	0	23-Oct-2013	Testuser		Edit

[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

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WILLIAMS, Steven (Mr)

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

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

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

Phone and email **01415554444**

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

Concordance

Is the patient taking their methotrexate as prescribed?

☐ Yes ☐ No

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

☐ Yes ☐ No

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

☐ Yes ☐ No

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

☐ Yes ☐ No

Read Only

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

Actions:

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

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

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

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

Advise the patient to carry and use the methotrexate booklet.

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

[Next - Interactions & precautions](#)

[return to Methotrexate Review Page](#)

Figure 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


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SMITH, Johnathan (Mr)
Preferred name John

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

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

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

Pharmaceutical care plan
High risk medicine assessments
New medicine interventions
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		Edit

[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 **NHS**
SCOTLAND

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

Start new medicine intervention

Medicine * Means a field requires data

Medicine detail Aspirin 75mg Tablets *

Instructions Take ONE Tablet Daily

Service CMS

Indication Angina

Start Cancel

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)

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

Initial intervention * Means a field requires data

Medicine

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

Intervention record

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

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

Notes

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

Notes

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

Notes

Figure 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).

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	

New medicines intervention for Aspirin 75mg Tablets

Use to add care issues for the specific question.

Medicine

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

Last modified: 13-Apr-2012 by Testuser

Initial intervention

Does the patient know why they have been prescribed the medicine?	Yes	
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

[Schedule follow up](#)

Care issues associated with this intervention

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

[Add](#)

Intervention completion

Intervention complete	No
Intervention completed by	
Intervention completed on	
<input type="button" value="Complete intervention"/>	Select...

[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)

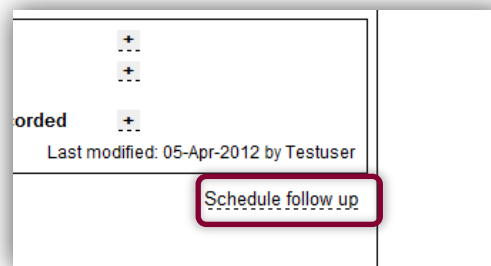


Figure 6-5: "Schedule follow up" link

- 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

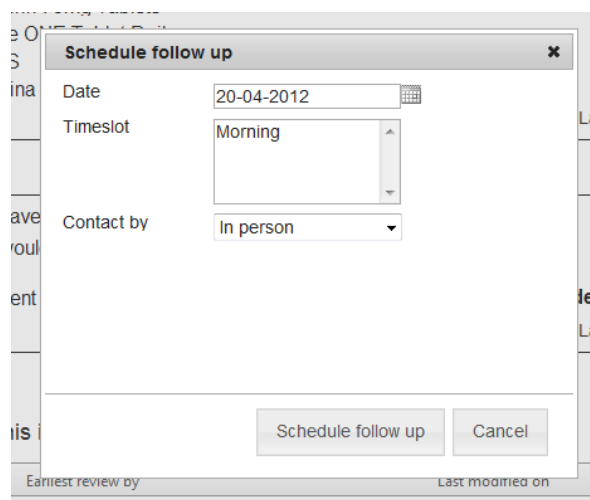


Figure 6-6: Schedule follow up pop up dialogue

- 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)

SMITH, Johnathan (Mr) 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?	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

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

Last modified: 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.

Follow up

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

Last modified: 20-Aug-2012 by testuser

[Schedule follow up](#)

Care issues associated with this intervention

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

[Add](#)

Intervention completion

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

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

Intervention record

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

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

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

Notes

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

Notes

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

Notes

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

Notes

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

Notes

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

Notes

Is this follow up intervention complete? ☐ Yes ☒ No

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

Is this follow up intervention complete?	Unanswered <small>Last modified: 05-Apr-2012 by Testuser</small>						
Schedule follow up							
Care issues associated with this intervention							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 35%; text-align: left;">Care issue</th> <th style="width: 35%; text-align: left;">Earliest review by</th> <th style="width: 30%; text-align: left;">Last modified on</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="padding: 5px;">No records to display.</td> </tr> </tbody> </table>		Care issue	Earliest review by	Last modified on	No records to display.		
Care issue	Earliest review by	Last modified on					
No records to display.							
Add							

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

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

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

Care issue
 Description of care issue *

Care issue outcome
 Desired Outcome *

Action

Action By Patient

Response

Status Open

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

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

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)

Is this follow up intervention complete? Last modified: 05-Apr-2012 by Testuser

[Schedule follow up](#)

Care issues associated with this intervention

Care issue	Earliest review by	Last modified on	
> difficulty opening the packaging	18-Apr-2012	05-Apr-2012	View

[Add](#)


Intervention completion

Intervention complete No

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

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

Record care issue for new medicine intervention

* Means a field requires data

Care issue	
Description of care issue	Patient is having problems or suffering adverse effects *
Care issue outcome	
Desired Outcome	Patient is not having problems or suffering adverse effects *
Action	<input type="text"/>
Action By	Patient
Response	<input type="text"/>
Status	Open
Review By	<input 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?	Unanswered +
Is the patient still taking the medicines according to the instructions?	Unanswered +
Has the patient missed any doses of the medicine or changed how they take it?	Unanswered +
Is the patient having any problems with the medicine?	Unanswered +
Is there anything else that the patient would like to know about the medicine?	Unanswered +
Does the patient require another follow up intervention?	Unanswered +
Is this follow up intervention complete?	Unanswered +

Last modified: 26-Mar-2012 by Testuser

[Schedule follow up](#)

Care issues associated with this intervention

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

[Add](#)

Intervention completion

Intervention complete	No
Intervention completed by	
Intervention completed on	
Complete intervention	<div> <div>Select...</div> <div> <div>Select...</div> <div>Adhering</div> <div>Not Adhering</div> <div>Lost to intervention</div> </div> </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	Yes: Adhering
Intervention completed by	Testuser
Intervention completed on	05-Apr-2012


[return to Patient Home Page](#)

Figure 6-18: Intervention completion information displayed

6.11 Summary of new medicine interventions for an individual patient

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

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

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

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

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		Edit

[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/Figure 6-1)
- Select the "Start support tool assessment" link, the "Support tool selection" page will be displayed (Figure 7-2)

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

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

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

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

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

Support tool assessments

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

Smoking cessation assessments

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

[Start support tool assessment](#)

Figure 7-1: Support tools tab

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

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

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

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

Support tool assessment

Please select the support tool

Gluten-free

[Start](#) [Cancel](#)

Figure 7-2: Support tool selection

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

Pharmacy Care Record


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

Address Phone and email

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

Concordance

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

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

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

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

Actions:

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

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

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

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

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

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

Next - Interactions & precautions Save & Review

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

Figure 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

Pharmacy Care Record 

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

[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

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WILLIAMS, Alan (Mr)		Born 17-Oct-1971 (41y) Gender Male CHI No. 555555555	
		Patient Details Last Modified On 10-Oct-2013 By Testuser	
Address		Phone and email	
Gluten-free assessment > Concordance > Interactions & precautions > Adverse effects > Monitoring > Review			
<h3>Adverse effects</h3> <div> <div> <p>Is the patient aware of the common symptoms that are caused by not following a gluten-free diet?</p> <p>Does the patient have any symptoms that may suggest that they are consuming foods that contain gluten?</p> <p>Is the patient aware that adverse effects should be reported?</p> </div> <div> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> </div> </div> <div> <p>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.</p> <p>Actions:</p> <p>Keep a record of any problems that the patient describes.</p> <p>Refer them to their GP if symptoms appear severe.</p> <p>Record any care issues in the patient's care plan and agree desired outcomes and actions.</p> </div>			
Back - Interactions & precautions		Next - Monitoring	
Save & 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

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

Address Phone and email

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

Monitoring

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

Gluten-free annual health check not completed in pharmacy ☐

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

Height or weight or both not available ☐

Height (m)

Weight (kg)

BMI

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

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

Actions:

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

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

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

Error message if incorrect date format entered.

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?

The date is in an unrecognised format, please use DD-MM-YYYY.

Height or weight or both not available ☐

Height (m)

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. Date must be entered in DD-MM-YYYY format.

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

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

Address Phone and email

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

Gluten-free assessment summary

Concordance

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

Adverse effects

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

Use ⊕ to add care issues for the specific question.

Interactions and precautions

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

Monitoring

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

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	

[Complete assessment](#)

[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 7-8)

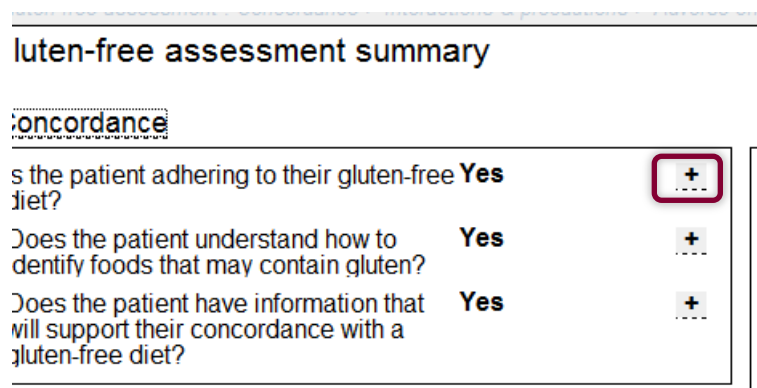


Figure 7-8: Add Care Issue / Care Issue Outcome link

- 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 

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SMITH, Johnathan (Mr)
Preferred name John

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

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

Record care issue for support tool assessment

* Means a field requires data

Care issue

Description of care issue

Patient may not be adhering to their gluten free diet *

Care issue outcome

Desired Outcome

Patient aware that adherence to a gluten free diet is vital for treatment and good health *

Action

Action By

Patient

Response

Status

Open

Review By

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

Save

Cancel

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 7-7.
- 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 

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

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

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

Figure 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 "Gluten-free assessment summary page"
- The newly created care issue / care issue outcome will be listed in the "care issues associated with this assessment" grid (Figure 5-16, Figure 7-12)

Care issues associated with this assessment			
Care issue	Earliest review by	Last modified on	
> Poor inhaler technique		13-Apr-2012	View
			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.

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

Gluten-free assessment summaryConcordance

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

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.

Adverse effects

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

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	View
			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	+
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 View
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
- The system will navigate to the Gluten-free support tool assessment Review page

To view a "Completed" Gluten-free support tool assessment:

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

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

Pharmacy Care Record 

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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
--------------------------	--------------------------------	----------------------------	---------------

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](#)

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	

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

Concordance

Is the patient adhering to their gluten-free diet?

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

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

YesNo

YesNo

YesNo

Read only

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

Actions:

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

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

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

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

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

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

[Next - Interactions & precautions](#)

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

Figure 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 Smoking Cessation Support Tool Assessment

8.1 Overview

8.1.1 Background

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

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

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

8.1.2 14 weeks PCR smoking cessation support tool assessment overview

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

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

8.1.3 Key information

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

8.2 Start Smoking Cessation Support Tool Assessment

To start a Smoking Cessation Support Assessment:

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

- Select the support tools tab (on the patient home page) and click the "Start support tool assessment" link. The support tool assessment options page is displayed, Figure 8-1.

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

Pharmacy Care Record **NHS**
SCOTLAND

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

Address Phone and email

Print Care Issues Edit

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

Support tool assessments

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

Smoking cessation assessments

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

Start support tool assessment

Figure 8-1: Start support tool assessment

- Select "Smoking Cessation" from the dropdown menu marked "Please select the support tool", Figure 8-2.

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

Pharmacy Care Record **NHS**
SCOTLAND

Search Protocols Reports Change password Manage profile Yellow card Help Logout

WILLIAMS, Steven Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
Patient Details Last Modified On 14-May-2014 By Testuser

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

Support tool assessment

Please select the support tool

Smoking cessation

Start Cancel

Figure 8-2: Please select the support tool

- Click "Start". The system will display the "Initial Data Capture" page, Figure 8-5.

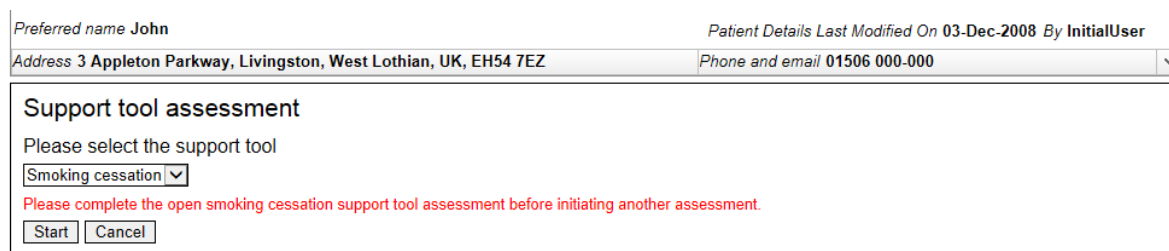
"Start" creates a new assessment in PCR for the patient.

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

Validation

If an open smoking cessation support tool assessment exist at the same pharmacy an error message will be displayed (Figure 8-3) and it will not be possible to create a new assessment.

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



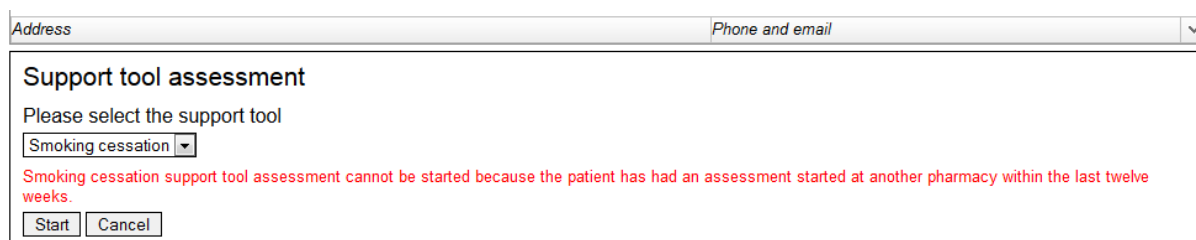
The screenshot shows a patient details header with the following information:

- 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

Below the header is a section titled "Support tool assessment". It contains the text "Please select the support tool" and a dropdown menu with "Smoking cessation" selected. Below the dropdown is a red error message: "Please complete the open smoking cessation support tool assessment before initiating another assessment." At the bottom of the section are two buttons: "Start" and "Cancel".

Figure 8-3: open smoking cessation support tool assessment exists

If an assessment has been started at another pharmacy within the last 12 weeks an error message will be displayed (Figure 8-4) and it will not be possible to create a new assessment.



The screenshot shows a patient details header with the following information:

- Address
- Phone and email

Below the header is a section titled "Support tool assessment". It contains the text "Please select the support tool" and a dropdown menu with "Smoking cessation" selected. Below the dropdown is a red error message: "Smoking cessation support tool assessment cannot be started because the patient has had an assessment started at another pharmacy within the last twelve weeks." At the bottom of the section are two buttons: "Start" and "Cancel".

Figure 8-4: Assessment started at another pharmacy within 12 weeks

8.3 Initial Data Capture

The Initial Data Capture page allows the user to enter or select the following information:

- Consent
- Client Information
- Tobacco use and quit attempts
- Pharmaceutical usage
- Referral and intervention context

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

To record Initial Data Capture:

- Select, or where applicable enter text, for all sections of the Initial Data Capture - or as much as is known.
Click save, the Review Page is displayed,
- Figure 8-7.

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

Pharmacy Care Record **NHS**
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WILLIAMS, Steven Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
 Patient Details Last Modified On 21-May-2014 By Testuser
 Address G12 8DG Phone and email

Smoking cessation: initial data capture

Consent

Does the client consent to follow up?

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

Client information

Gender

If female, pregnant? ☐

What is the client's ethnic group?

If 'Other' chosen above, please specify

What is the client's employment status?

If 'Other' chosen above, please specify

Tobacco use and quit attempts

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

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

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

Referral and assessment context

Date referred to service

Referral source(s)

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

If 'Other' chosen above, please specify

Intervention setting(s)

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

If 'Other' chosen above, please specify

Date of initial appointment

Intervention(s) used in this quit attempt

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

If 'Other' chosen above, please specify

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

Pharmaceutical usage

Pharmaceutical usage

Total number of weeks of known product use

Figure 8-5: Smoking Cessation Initial Data Capture

If a selected option for "Pharmaceutical usage" includes Varenicline, additional guidance is displayed and questions must be answered to confirm if the Varenicline assessment indicates that the patients GP should be contacted and to confirm that the GP must be contacted before the patient begins on Varenicline, Figure 8-6.

This additional information is not included in the MDS submissions.

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

Figure 8-6: Pharmaceutical usage includes Varenicline

8.4 Review assessment details (after Initial data capture)

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

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

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

Pharmacy Care Record **NHS**
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WILLIAMS, Steven

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

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

Address G12 8DG

Phone and email

Smoking cessation

Initial data capture

Client information

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

Tobacco use and quit attempts

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

Pharmaceutical usage

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

Referral and intervention context

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

Consent

Consent to follow up

Unanswered

Quit date Not set

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

Care issues associated with this assessment

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

[Add](#)

Assessment completion

Assessment complete

Assessment completed by

Assessment completed on

Please select

[Complete](#)

Unique reference

Not set

[return to Patient Home Page](#)

Unanswered questions shown as "Unanswered".

Figure 8-7: Review Page after Initial Data Capture

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

Initial Data Capture

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

Quit date

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

Next Action

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

Care issues associated with this assessment

Option to add a care issue is available.

Assessment completion

Function to complete an assessment in PCR. This is independent of the MDS submission process. More details of this function are provided in section 8.15.

8.5 Start Quit Attempt and Confirm Quit Date

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

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

To start a quit attempt and confirm quit date

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

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

Pharmacy Care Record **NHS**
SCOTLAND

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WILLIAMS, Steven Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
Patient Details Last Modified On 14-May-2014 By Testuser

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

Smoking cessation intervention

Initial data capture

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

Quit date Not set

Next action Start quit attempt and confirm quit date

Care issues associated with this assessment

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

Add

Figure 8-8

8.6 Confirm quit date and record contact

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

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

- Enter the quit date you have agreed with the patient in the "confirm quit date and record contact" section.
- Complete contact details (date, contact type, has the patient smoked, CO reading, product, product and contact notes)
- Click the confirm quit date button, the review page is displayed

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

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

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

Confirm quit date and record contact

Quit date
☒ Record contact
 Contact date
 Contact type Please select
 Has the patient smoked? ☐ Yes ☐ No
 CO Reading Please select ppm
 Product

☐ 16h patch
☐ Gum
☐ Sub-lingual tablet

☐ 24h patch
☐ Nasal spray
☐ Bupropion

☐ Lozenge
☐ Inhalator
☐ Varenicline

☐

Product and contact notes

Confirm quit date
Cancel

[return to Smoking Cessation Review Page](#)

Figure 8-9: Confirm quit date (with option to record contact)

To confirm quit date (without Recording a contact):

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

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Wed, Jun 4, 2014 14:50

Pharmacy Care Record



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WILLIAMS, Steven (Mr)		Born 15-Feb-1945 (69y) Gender Male CHI No. 1111111111	
		Patient Details Last Modified On 11-Jun-2014 By Testuser	
Address 5 Oakbank Avenue, Glasgow, G12 3NR		Phone and email 10234567890	
Client information Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) Tobacco use and quit attempts Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts Unknown Pharmaceutical usage Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0		Referral and intervention context Referral date 02-Jun-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment 09-Jun-2014 Intervention(s) used in this quit attempt One to one sessions Intervention (other) Is shared care No Consent Consent to follow up Yes	

Confirm quit date and record contact

Quit date	<input type="text"/>
<input type="checkbox"/> Record contact	
<div>Confirm quit date</div> <div>Cancel</div>	

[return to Smoking Cessation Review Page](#)

Figure 8-10: Confirm quit date (Without recording a contact)

If any of the initial data capture information is invalid/missing, a section named “ Please correct the following validation errors before attempting to proceed” is displayed in place of the “confirm quit date and record contact” section.

The missing or invalid information is highlighted in red text, Figure 8-11.

- The “Edit Initial Data Capture” link allows the patient to update any missing information from the Initial Data Capture.
- The “Edit Patient” link allows the user to edit address, telephone and post code information held in the patient profile. This information is also submitted as part of the minimum dataset.

Once all missing or invalid information is corrected the “confirm quit date and record contact” section is displayed.

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

Pharmacy Care Record 

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

WILLIAMS, Steven		Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444	
		Patient Details Last Modified On 14-May-2014 By Testuser	
Address 3 Apples Avenue, G12 8DG		Phone and email 10234000000	
Client information Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) Tobacco use and quit attempts Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts No quit attempts Pharmaceutical usage Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0		Referral and intervention context Referral date 01-May-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment Unanswered Intervention(s) used in this quit attempt Unanswered Intervention (other) Is shared care No Consent Consent to follow up Yes	

Please correct the following validation errors before attempting to proceed:

Date of initial appointment is a required field.
 Intervention(s) is a required field.

[Edit initial data capture](#) [Edit patient](#)

Example error messages: where post code is not in a valid format; where the patient's date of birth does not match the CHI.


Pharmaceutical usage weeks
<p>Please correct the following validation errors before attempting to proceed:</p> <ul style="list-style-type: none"> ■ Postcode is not in a valid format. ■ The patient's date of birth does not match the CHI number given. The first six digits should be DDMMYY.
<p>Edit initial data capture Edit patient</p>

Figure 8-11: Validation errors shown in red text

8.7 Review Assessment Details (Quit Date Confirmed)

The review page is displayed once the quit date is confirmed, Figure 8-12.

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

Pharmacy Care Record


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WILLIAMS, Steven
Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
Patient Details Last Modified On 21-May-2014 By Testuser

Address 3 Apples Avenue, G12 8DG
Phone and email 102340000000

Smoking cessation

Initial data capture

Client information Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) Tobacco use and quit attempts Cigarettes smoked 10 or less Time after waking Within 5 minutes Number of quit attempts No quit attempts Pharmaceutical usage Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0	Referral and intervention context Referral date 13-May-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment 21-May-2014 Intervention(s) used in this quit attempt One to one sessions Intervention (other) Is shared care No Consent Consent to follow up Yes
---	--

Quit date 23-May-2014

Next action Release 4 week MDS

[View submitted minimum data set](#)

Minimum dataset

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	21-May-2014
Four week	20-Jun-2014 - 04-Jul-2014	Open	Not submitted		
Twelve week	01-Aug-2014 - 29-Aug-2014	Open	Not submitted		

Contact

Week	Contact date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
0	21-May-2014	Face to face	No	Not recorded	Gum		Testuser	21-May-2014

[Record](#)

Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
No records to display.				

[Record](#)

Care issues associated with this assessment

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

[Add](#)

Assessment completion

Assessment complete
Assessment completed by
Assessment completed on
Please select

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

[return to Patient Home Page](#)

Figure 8-12: Review Page after quit date is confirmed

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

Initial Data Capture (Summary)

A summary of the initial data capture.

Quit Date

Once the Quit Date is Confirmed it is displayed on the Smoking Cessation Review Page.

Next Action

This section shows the "Release 4 week MDS" link. The link is disabled until it is between 4-6 weeks from the quit date. (This will also show the "Release 12 week MDS" link when the current date is within the target date submission window)

View Submitted Minimum Dataset link

Select this link to view all submitted MDS data.

Minimum Dataset

A summary of the status of the Start, 4 week and 12 week MDS.

Contacts

A summary of any contacts that have been created

Contact Attempts

A summary of any contact attempts that have been created

Care Issues associated with this assessment

A summary of any associated care issues that have been created

Assessment completion

Option to complete an assessment. When complete, completion date and reason are shown.

Unique Reference

Unique reference for quit attempt.

8.8 Submit 4 Week Data

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

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

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

To submit 4 week data:

- Select release 4 week MDS link from the next action section of the review page.
- Enter required information
- Click submit 4 week data button

There is a link to update the initial data capture details if any have changed. For example "Pharmaceutical usage weeks".

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

WILLIAMS, Steven
Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444
Patient Details Last Modified On 14-May-2014 By Testuser
Address 3 Apples Avenue, G12 8DG Phone and email 10234000000

Client information Gender Male Pregnant No Ethnic group White Scottish Ethnic group (other) Employment status In paid employment Employment status (other) Tobacco use and quit attempts Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts No quit attempts Pharmaceutical usage Pharmaceutical usage NRT only (combination therapy) Pharmaceutical usage weeks 0	Referral and intervention context Referral date 01-Apr-2014 Referral source Self-referral Referral source (other) Intervention setting(s) Pharmacy Intervention setting (other) Date of initial appointment 14-Apr-2014 Intervention(s) used in this quit attempt One to one sessions Intervention (other) Is shared care No Consent Consent to follow up Yes
--	--

Submit four week minimum dataset

Was the client successfully contacted for 1-month follow up? Yes
Date follow-up carried out 14-05-2014
Client withdrawn from service at time of follow-up? ☐ Yes ☒ No
Has the client smoked at all (even a puff) in the last two weeks? No
CO reading confirms quit? Yes
Reason CO reading not taken? Please select
If initial data capture has changed please edit the values using the following link
[Initial data capture](#)


[return to Smoking Cessation Review Page](#)

Figure 8-13: Submit 4 week data

Before the 4 week minimum data set information can be submitted, any missing or invalid data is highlighted, Figure 8-14.

Example validation error: Referral source is a required field.

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

Pharmacy Care Record


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WILLIAMS, Steven
Born 20-Aug-1979 (34y) Gender Male CHI No. 444444444
Patient Details Last Modified On 14-May-2014 By Testuser

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

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

Please correct the following validation errors before attempting to proceed:
Referral source is a required field.
[Edit initial data capture](#) [Edit patient](#)

[return to Smoking Cessation Review Page](#)

Example validation error: CHI is validated against the date of birth at point of 4 week submission.

Pharmaceutical usage weeks 0

Quit date 10-Jul-2014

Please correct the following validation errors before attempting to proceed:
The patient's date of birth does not match the CHI number given. The first six digits should be DDMMYY.
[Edit initial data capture](#) [Edit patient](#)

Unique reference PCR-B8E76E81-61CE-4C63-8B8C-241A14224764

[return to Smoking Cessation Review Page](#)

Figure 8-14: Submit 4 week data validation error shown

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

8.9 Review Assessment Details (4 Week Data Submitted)

Now that the 4 week MDS has been submitted, the minimum dataset section shows the overall MDS status as "Validated" with the release status shown as "Submitted", Figure 8-15.

The assessment must be accessed and updated with any contacts or contact attempts that occur in the weeks leading up to the 12 week submission. Where appropriate, care issues can also be recorded.

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

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WILLIAMS, Steven

Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444

Patient Details Last Modified On 05-Jun-2014 By Testuser

Address 3 Apples Avenue, PA3 3BB

Phone and email 10234567890

Smoking cessation

Initial data capture

Client information		Referral and intervention context	
Gender	Male	Referral date	01-May-2014
Pregnant	No	Referral source	Pharmacist
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Primary Care Hospital - Inpatient Educational establishment Non-NHS community venue
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	03-May-2014
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	One to one sessions Group support (closed groups) Couple/family based support
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	Consent	
Pharmaceutical usage		Consent to follow up	Yes
Pharmaceutical usage	None		
Pharmaceutical usage weeks	0		

Quit date 05-May-2014

Next action Release 12 week MDS

[View submitted minimum data set](#)

Minimum dataset

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	05-Jun-2014
Four week	02-Jun-2014 - 16-Jun-2014	Validated	Submitted	Testuser	05-Jun-2014
Twelve week	14-Jul-2014 - 11-Aug-2014	Open	Not submitted		

Contact

Week	Contact date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
No records to display.								

[Record](#)

Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
No records to display.				

[Record](#)

Care issues associated with this assessment

Care issue	Earliest review by	Last modified on
> CARE ISSUE DESCRIPTION TEXT	27-Jun-2014	05-Jun-2014 View

[Add](#)

Assessment completion

Assessment complete
 Assessment completed by
 Assessment completed on
 Please select

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156

[return to Patient Home Page](#)

Figure 8-15: 4 week data submitted

The "Next Action" is shown as "Release 12 week MDS". This link is not enabled until the 12 week submission window is reached (10-14 weeks from quit date).

8.10 Submit 12 Week Data

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

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

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

To submit the 12 week data:

- Select "Release 12 week MDS" link from the next action section of the review page.
- Enter required information
- Click submit 12 week data button, the review page is displayed.

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

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WILLIAMS, Steven

Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444

Patient Details Last Modified On 05-Jun-2014 By Testuser

Address 3 Apples Avenue, PA3 3BB

Phone and email 10234567890

Client information

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

Tobacco use and quit attempts

Cigarettes smoked 11 to 20
 Time after waking 6 to 30 minutes
 Number of quit attempts No quit attempts

Pharmaceutical usage

Pharmaceutical usage None
 Pharmaceutical usage weeks 0

Referral and intervention context

Referral date 08-Jan-2014
 Referral source Pharmacist
 Referral source (other)
 Intervention setting(s) Primary Care
 Hospital - Inpatient
 Educational establishment
 Non-NHS community venue
 Intervention setting (other)
 Date of initial appointment 05-Feb-2014
 Intervention(s) used in this quit attempt One to one sessions
 Group support (closed groups)
 Couple/family based support

Intervention (other)

Is shared care No

Consent

Consent to follow up Yes

Quit date 05-Mar-2014

Submit twelve week minimum dataset

Was the client successfully contacted for 3-month follow-up?

Date follow-up carried out

Has the client smoked at all since the 1-month follow-up?

CO reading confirms quit?

Reason CO reading not taken?

If initial data capture has changed please edit the values using the following link

[Initial data capture](#)

[Submit twelve week data](#)

[Cancel](#)

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156

[return to Smoking Cessation Review Page](#)

Figure 8-16: Submit 12 week data.

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

Note: When "Submit 12 week data" is selected, any missing or invalid data will be highlighted. It will not be possible to proceed until these errors are corrected. For example, where the patient's date of birth does not match the CHI, below.

Please correct the following validation errors before attempting to proceed:

The patient's date of birth does not match the CHI number given. The first six digits should be DDMMYY.

[Edit initial data capture](#) [Edit patient](#)

Unique reference PCR-B8E76E81-61CE-4C63-8B8C-241A14224764

[return to Smoking Cessation Review Page](#)

8.11 Review Assessment Details (12 Week data submitted)

Now that the 12 week MDS has been submitted, the minimum dataset section is complete for all MDS submissions; it shows the overall MDS status for Start, four week and twelve week as "Validated" with the release status for each shown as "Submitted", Figure 8-17.

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

The "Next Action" section is no longer displayed on the page.

Quit date	13-Feb-2014
------------------	-------------

[View submitted minimum data set](#)

Minimum dataset

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	14-May-2014
Four week	13-Mar-2014 - 27-Mar-2014	Validated	Submitted	Testuser	14-May-2014
Twelve week	24-Apr-2014 - 22-May-2014	Validated	Submitted	Testuser	14-May-2014

Contact

Week	Intervention date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
14	14-May-2014	Face to face	No	Not recorded			Testuser	14-May-2014

[Record](#)

Contact attempts

Week	Contact attempted on	Contact type	Recorded by	Recorded on
14	14-May-2014	Telephone	Testuser	14-May-2014

[Record](#)

Care issues associated with this assessment

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

[Add](#)

Intervention completion

Intervention complete
 Intervention completed by
 Intervention completed on
 Please select

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

[return to Patient Home Page](#)

Figure 8-17

8.12 Record Contact

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

To record a contact:

- Select the "Record" link at the bottom right hand side of the "Contact summary" on the review page
- Enter required information
- Click "record contact", details are saved the review page is displayed.

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

Smoking cessation: record contact

Client information		Referral and intervention context	
Gender	Male	Referral date	02-Jun-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	09-Jun-2014
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	Unknown	Consent	
Pharmaceutical usage		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

Contact

Contact date	<input type="text"/>
Contact type	<input type="text" value="Please select"/>
Has the patient smoked?	<input type="radio"/> Yes <input type="radio"/> No
CO Reading	<input type="text" value="Please select"/> ppm
Product	<div> 16h patch <input type="checkbox"/> 24h patch <input type="checkbox"/> Lozenge <input type="checkbox"/> </div> <div> Gum <input type="checkbox"/> Nasal spray <input type="checkbox"/> Inhalator <input type="checkbox"/> </div> <div> Sub-lingual tablet <input type="checkbox"/> Bupropion <input type="checkbox"/> Varenicline <input type="checkbox"/> </div> <div> Mouth spray <input type="checkbox"/> Oral film strips <input type="checkbox"/> </div>
Product and contact notes	<input type="text"/>
<input type="button" value="Record contact"/> <input type="button" value="Cancel"/>	

Figure 8-18: Record Contact

Note: Changes to this screen in PCR 9.2: Products, "Mouth Spray" and "Oral film strips" added; No validation on contact date (date can be in the past); CO reading possible values are 0-50.

8.13 Record Contact Attempt

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

To record a contact attempt:

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

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

Pharmacy Care Record 

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WILLIAMS, Steven	Born 20-Aug-1979 (34y) Gender Male CHI No. 4444444444
	Patient Details Last Modified On 14-May-2014 By Testuser
Address 3 Apples Avenue, G12 8DG	Phone and email 10234000000

Smoking cessation intervention: record contact attempt

Client information		Referral and intervention context	
Gender	Male	Referral date	13-May-2014
Pregnant	No	Referral source	Self-referral
Ethnic group	White Scottish	Referral source (other)	
Ethnic group (other)		Intervention setting(s)	Pharmacy
Employment status	In paid employment	Intervention setting (other)	
Employment status (other)		Date of initial appointment	14-May-2014
Tobacco use and quit attempts		Intervention(s) used in this quit attempt	One to one sessions
Cigarettes smoked	11 to 20	Intervention (other)	
Time after waking	6 to 30 minutes	Is shared care	No
Number of quit attempts	No quit attempts	Consent	
Pharmaceutical usage		Consent to follow up	Yes
Pharmaceutical usage	NRT only (combination therapy)		
Pharmaceutical usage weeks	0		

Contact attempt

Contacted attempted on	<input type="text" value="20-05-2014"/>
Contact type	<input type="text" value="Face to face"/>
<input type="button" value="Record contact attempt"/> <input type="button" value="Cancel"/>	

Figure 8-19: record contact attempt

8.14 Support tools overview

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

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Wed, Jun 11, 2014 11:06

Pharmacy Care Record 

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WILLIAMS, Steven (Mr) *Born 15-Feb-1945 (69y) Gender Male CHI No. 1111111111*
Patient Details Last Modified On 11-Jun-2014 By Testuser
 Address **5 Oakbank Avenue, Glasgow, G12 3NR** Phone and email **10234567890** ▼

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

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

Support tool assessments

Type	Number of care issues	Status	Last modified on	Last modified by	Assessment completed on	Assessment completed by
Gluten-free	0	Open	11-Jun-2014	Testuser		Review

Smoking cessation assessments

	Quit date	Status	MDS	Last recorded contact	Quit attempt in	
>		Open	Open			Review
>	11-Jun-2014	Closed	Started		Week 1	Review

[Start support tool assessment](#)

Figure 8-20: Support tools overview

8.15 Smoking Cessation Assessment Completion

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

As with other assessments in PCR a smoking cessation assessment must be completed before a new assessment can be begin. If a patient wanted to restart a quit attempt (because they had smoked) the pharmacy will need to complete the existing assessment (not necessarily waiting for the next MDS submission) before beginning a new one.

Valid PCR completion statuses are:

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

MDS	Target date	Status	Release status	Submitted by	Submitted on
Start	-	Validated	Submitted	Testuser	14-May-2014
Four week	13-Mar-2014 - 27-Mar-2014	Validated	Submitted	Testuser	14-May-2014
Twelve week	24-Apr-2014 - 22-May-2014	Validated	Submitted	Testuser	14-May-2014

Week	Intervention date	Contact type	Smoked	CO reading	Product	Product and contact notes	Recorded by	Recorded on
14	14-May-2014	Face to face	No	Not recorded			Testuser	14-May-2014

Week	Contact attempted on	Contact type	Recorded by	Recorded on
14	14-May-2014	Telephone	Testuser	14-May-2014

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

Intervention completion

Intervention complete

Intervention completed by

Intervention completed on

Please select v Complete

Figure 8-21: Intervention completion


Once set to complete, minimum data set information will be read only.

8.16 View Submitted minimum data set

This read only view of submitted minimum dataset is updated with each submission.

The example in Figure 8-22 shows all submissions.

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

Pharmacy Care Record


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

Patient Details Last Modified On 05-Jun-2014 By Testuser

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

Initial data capture

Client information Gender Male Pregnant No Ethnic group White Scottish Employment status In paid employment	Referral and intervention context Referral date 08-Jan-2014 Referral source Pharmacist Intervention setting(s) Primary Care Hospital - Inpatient Educational establishment Non-NHS community venue
Tobacco use and quit attempts Cigarettes smoked 11 to 20 Time after waking 6 to 30 minutes Number of quit attempts No quit attempts	Date of initial appointment 05-Feb-2014 Intervention(s) used in this quit attempt One to one sessions Group support (closed groups) Couple/family based support
Pharmaceutical usage Pharmaceutical usage None Pharmaceutical usage weeks 0	Is shared care No Consent Consent to follow up Yes

Quit date 05-Mar-2014

Four week submission

Was the client successfully contacted for 1-month follow up?	Yes
Date follow-up carried out	05-Jun-2014
Client withdrawn from service at time of follow-up?	No
Has the client smoked at all (even a puff) in the last two weeks?	No
CO reading confirms quit?	CO reading not taken

Twelve week submission

Was the client successfully contacted for 3-month follow up?	Yes
Date follow-up carried out	05-Jun-2014
Has the client smoked at all since the 1-month follow-up?	No

Unique reference PCR-312EB8F0-EF1C-4DD4-BB9E-A617CE4D2156
[return to Smoking Cessation Review Page](#)

Figure 8-22: Submitted minimum dataset

9 Reports

9.1 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
- Smoking Cessation

To access the reports page

- Select the “Reports” link from the PCR high level menu (Figure 9-1).
- The “Reports” summary page is displayed, Figure 9-2.

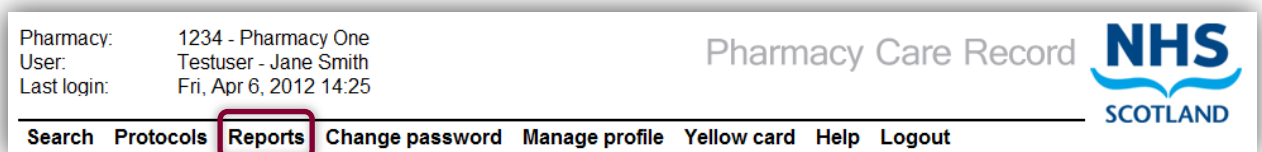


Figure 9-1: reports link on high level menu

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

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

Reports

Care issue and patient report	
Outstanding care issues	
Patient report for associated pharmacy	
New medicine intervention support tool reports	
All new medicine interventions for the pharmacy	[0]
All open new medicine interventions	[0]
Follow ups scheduled up to TODAY	[0]
Follow ups scheduled up to 7 days from today	[0]
Follow ups scheduled up to 14 days from today	[0]
Follow ups scheduled up to 28 days from today	[0]
Open new medicine interventions without any follow ups	[0]
Completed new medicine interventions	[0]
Complex dispensing patient reports	
Complex dispensing patient set to Yes	[0]
Complex dispensing patient set to No	[0]
Complex dispensing patient set to Not Recorded	[4]
Gluten-free reports	
Diagnosed coeliac patients (historical)	[1]
Gluten-free diet set to Yes	[0]
Gluten-free diet set to No	[0]
Gluten-free diet set to Not Recorded	[4]
All gluten-free assessments	[5]
All open gluten-free assessments	[2]
All completed gluten-free assessments	[3]
Annual health check scheduled up to 8 weeks from today	[0]
Annual health check not completed in pharmacy	[3]
High risk medicine assessments support tool reports	
All high risk medicine assessments for the pharmacy	[1]
All open high risk medicine assessments	[1]
All completed high risk medicine assessments	[0]
Smoking cessation reports	
Open smoking cessation assessments	[0]
Completed smoking cessation assessments	[1]
No interactions in the last seven days	[0]
MDS	
Expiring within the next seven days	[0]
No quit date set	[0]
Awaiting 4 or 12 week follow up	[0]

Figure 9-2: Reports Page with record count highlighted

A count of the number of records in each report is shown opposite the report title in square brackets, Figure 9-2.

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

9.2 Outstanding care issues report

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


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

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

To run the outstanding care issues report:

- Select the outstanding care issues link from the "Reports" page
- The outstanding care issues criteria will be displayed (Figure 9-3)

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

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Outstanding care issues

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


Generate Report

Figure 9-3: Outstanding care issues report criteria

- Select the "Generate Report" button, all outstanding care issues for the associated pharmacy will be displayed Figure 9-4

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

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Outstanding care issues

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

Generate Report

Report

Patient	DOB	CHI	Postcode	
> Ms Jane Smith	07-Aug-1990	9008075679	EH54 7EZ	View
> Mr Johnathan Smith	03-Feb-2001	0102031231	EH54 7EZ	View

Figure 9-4

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.

9.3 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
- The report criteria options will be displayed (Figure 9-5)
- Click the "generate report button" (Figure 9-5)

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

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Patient report for Pharmacy One

Criteria	
PCR creation date, from	<input type="text"/> to <input type="text"/>
	<small>e.g: 01-05-2010 for the 1st of May 2010</small>
PCP Priority	<input type="text" value="All"/>
Care Issues Recorded	<input type="text" value="All"/>
Initial Assessment Completed	<input type="text" value="All"/>
<input type="button" value="Generate Report"/>	

Figure 9-5: 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 9-6)

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

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Patient report for Pharmacy One

Criteria
 PCR creation date, from to
e.g: 01-05-2010 for the 1st of May 2010
 PCP Priority
 Care Issues Recorded
 Initial Assessment Completed

Generate Report

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	View

Figure 9-6: 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 9-7)

Generate Report

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	View

Figure 9-7: "View" link

9.4 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.

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 9-8)

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

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Reports

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

Figure 9-8: New medicine intervention support tool report links

- The report is displayed (Figure 9-9)

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

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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	Review

[return to Reports Page](#)

Figure 9-9: All new medicine interventions report

Report Data

Report Name	Report columns
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"> • Patient Name • CHI • Medicine detail • Last modified on • Last modified by • Status • Review page link
Follow ups scheduled up to today Follow ups scheduled up to 7 days from today Follow ups scheduled up to 14 days from today Follow ups scheduled up to 28 days from today	<ul style="list-style-type: none"> • Scheduled date (hover for timeslot) • Patient name • CHI • Medicine detail • Last modified on • Last modified by • Contact preference (By Telephone or In Person) • Review page link

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

9.5 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 from the reports page, Figure 9-2 (Separate links for Yes, No, or Not recorded)
- The report detail will be displayed, Figure 9-10.

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

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

[return to Reports Page](#)

Figure 9-10: 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.

9.6 Gluten-free reports

Gluten-free reports are accessed from a link on the Reports Page, Figure 9-2.

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 9-11

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

Pharmacy Care Record



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

[return to Reports Page](#)

Figure 9-11: 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.

9.7 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 9-2.

- 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 9-2.
- The report detail will be displayed, Figure 9-12 (Example shown "All")

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

Pharmacy Care Record **NHS**
 SCOTLAND

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High Risk Medicine Assessments

Criteria

Type

All

Status

All

Generate Report

Number of records on report: 1

Patient Name	CHI	Type	Last modified on	Last modified by	Status	
Johnathan Smith	1111111111	Methotrexate	25-Feb-2013	ork5	Open	View

[return to Reports Page](#)

Figure 9-12: 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.

9.8 Smoking Cessation support tool assessment reports


9.8.1 Report Filter for smoking cessation reports

All smoking cessation reports have the same filter capability.

To Show/Hide the filter:

- Select "Show/Hide Filter" to toggle the report filter, shown in the example below. The will toggle the display of the filter.

Pharmacy: 1234 - Pharmacy One
User: Testuser - Jane Smith
Last login: Thu, Jun 5, 2014 11:20

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Assessments with no interactions in the last seven days

Number of records on report: 6

Show/Hide Filter

Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
<input type="text"/>	<input type="text" value="Apr"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> Clear
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Nine Nine	25-Apr-2014	03-Jun-1996	0909091234	BB11 1BB	Week 1	Week 7	Four week released View
Ten Ten	25-Apr-2014	03-Jun-1997	1010101234	AA11 2BB	Week 1	Week 7	Four week released View
Three Three	25-Apr-2014	03-Jun-1990	0303031239	AA1 1AA	Week 1	Week 7	Four week released View

[return to Reports Page](#)

Show or Hide Filter

To use the filter:

- Enter search criteria in any the filter text boxes that correspond with the report columns. The filter will be applied as you type.

Select "Clear" to remove filter criteria you have typed.

The filter criteria you type applies to any part of the data you are wanting to filter. For example to filter all quit dates in April, enter "Apr" into the quit date filter box.

9.8.2 All Open smoking cessation assessments for the pharmacy

Report Overview

The "All Open smoking cessation assessments for the pharmacy" lists all smoking cessation assessments that have a PCR status of "Open". This is independent of the MDS Status.

Pharmacy: 1234 - Pharmacy One
User: Testuser - Jane Smith
Last login: Wed, Jun 11, 2014 14:02

Pharmacy Care Record 

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All Open smoking cessation assessments for the pharmacy							Today: Wednesday, 11th June, 2014
							Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Mr Steven Williams		15-Feb-1945	1111111111	G12 3NR			Open View

[return to Reports Page](#)

Figure 9-13: All open

Report Columns

- Patient Name
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS (Status)

"View" Link

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

9.8.3 All Completed smoking cessation assessments for the pharmacy

The "All Completed smoking cessation assessments for the pharmacy" lists all smoking cessation assessments that have been completed using the assessment completion function in PCR. This is independent of the MDS Status.

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Wed, Jun 11, 2014 14:15

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All Completed smoking cessation assessments for the pharmacy							Today: Wednesday, 11th June, 2014
							Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS
Frembokin Holutgon	04-May-2014	27-Jul-1973	8888888888	EH54 7EZ		Week 7	Four week released View
Mr Steven Williams	11-Jun-2014	15-Feb-1945	1111111111	G12 3NR		Week 1	Started View

[return to Reports Page](#)

Figure 9-14: All Completed smoking cessation assessments

Report Columns

- Patient Name
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS

"View" Link

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

9.8.4 Assessments with no interactions in the last seven days

The report is intended to help the pharmacist keep track of patients that have not been in regular contact with the pharmacy.

This report highlights where there has been no contact in the last 7 days (or more). It is cumulative - once an assessment appears on the report it will stay there until a contact is recorded.

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Thu, Jun 5, 2014 11:20



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Assessments with no interactions in the last seven days								Number of records on report: 6
								Show/Hide Filter
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS	
<input type="text"/>	<input type="text" value="25"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Clear
Patient name	Quit date	Date of birth	CHI	Post code	Last contact week	Quit attempt week	MDS	
Nine Nine	25-Apr-2014	03-Jun-1996	0909091234	BB11 1BB	Week 1	Week 7	Four week released View	
Ten Ten	25-Apr-2014	03-Jun-1997	1010101234	AA11 2BB	Week 1	Week 7	Four week released View	
Three Three	25-Apr-2014	03-Jun-1990	0303031239	AA1 1AA	Week 1	Week 7	Four week released View	

[return to Reports Page](#)

Figure 9-15

Report Columns

- Patient Name
- Quit Date
- Date of birth
- CHI
- Post code
- Last contact week
- Quit attempt week
- MDS (Status)

“View” Link

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

9.8.5 Assessments awaiting four or twelve week follow up

This report assists with keeping track of smoking cessation assessments that are within their next MDS submission window. It will show all open smoking cessation assessment where:

- The next step is 4 week MDS submission and are in the 4-6 week submission window
- The next step is 12 week MDS submission and are in the 10-14 week submission window

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Wed, Jun 11, 2014 14:15

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Assessments awaiting four or twelve week follow up

Number of records on report: 1
[Show/Hide Filter](#)

Patient name	Quit date	Date of birth	CHI	Post code	MDS Stage	Last contact week	Quit attempt week	
Mark Feeney	07-May-2014	04-Feb-1984	222222222	G12 9XQ	Four week	Week 4	Week 6	View

[return to Reports Page](#)

Figure 9-16

Report Columns

- Patient Name
- Quit Date
- Date of birth
- CHI
- Post code
- MDS Stage
- Last contact week
- Quit attempt week

“View” Link

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

9.8.6 Assessments with no quit date set

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

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Assessments with no quit date set				Number of records on report: 1
				Show/Hide Filter
Patient name	Date of birth	CHI	Post code	
One One	03-Jun-1987	0101011237	AA1 1AA	View

[return to Reports Page](#)

Figure 9-17

Report Columns

- Patient Name
- Date of birth
- CHI
- Post code

“View” Link

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

9.8.7 Assessments with minimum data set submissions expiring in the next seven days

This report assists with managing assessment that are nearing their MDS submission deadline. It is intended to help ensure submissions are not missed.

Pharmacy: 1234 - Pharmacy One
 User: Testuser - Jane Smith
 Last login: Tue, Jun 17, 2014 11:31



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Assessments with minimum data set submissions expiring in the next seven days

Number of records on report: 1
[Show/Hide Filter](#)

Patient name	Quit date	Date of birth	CHI	Post code	Days to expiry	Last contact week	Quit attempt week	MDS
Robert Johnston	10-May-2014	01-Jan-1983	9999999999	G1 1AB	4	Week 1	Week 7	Started View

[return to Reports Page](#)

Figure 9-18

Report Columns

- Patient Name
- Quit Date
- Date of birth
- CHI
- Post code
- Days to expiry
- Last contact week
- Quit attempt week
- MDS

“View” Link

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

10 PMR interface to PCR

10.1 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 10-1 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 10-1: link to PCR from the Cegedim RX Pharmacy Manager PMR

Figure 10-2 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.

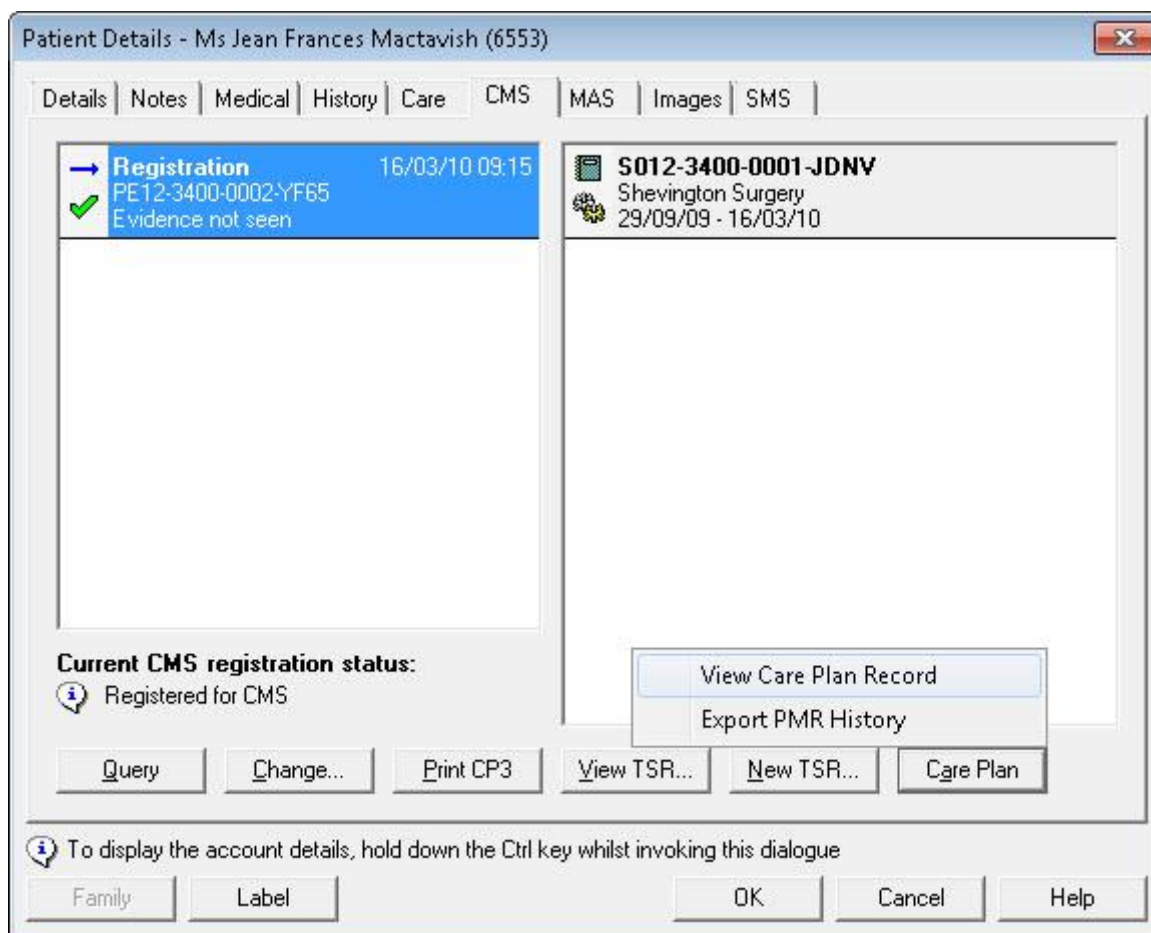


Figure 10-2: Positive Solution's Analyst PMR system

10.2 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 10-3) 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

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Patient Import Match

The data passed from your PMR Application differs from the Patient information within the PCR Application.
Patient with CHI: 3333333333

PCR information for the Patient		PMR information for the Patient	
Family name	Patient	Family name	Patient
Given name	Demo	Given name	Demo
Title	Mr	Title	Mr
Date of birth	01-Jan-1960	Date of birth	01-Jan-1960
Address 1	3 Appleton Parkway	Address 1	2 Linwood Road
Address 2	Livingston	Address 2	Linwood
Address 3	West Lothian	Address 3	Paisley
Address 4		Address 4	
Address 5		Address 5	
Postcode	EH54 7EZ	Postcode	PA3 3BB
Home telephone number	0123456789	Telephone number	0987654321
Gender	Male	Gender	Male

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

Figure 10-3: 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.

10.3 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.

10.3.1 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 10-4)

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 View
> Aspirin 75mg Tablets	01-Jan-2010	CPUS		13-Apr-2010	1234567	False View

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

[return to Patient Home Page](#)

Figure 10-4: 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 [Browse...](#) [Upload](#)

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

Figure 10-5: 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 10-5, 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.

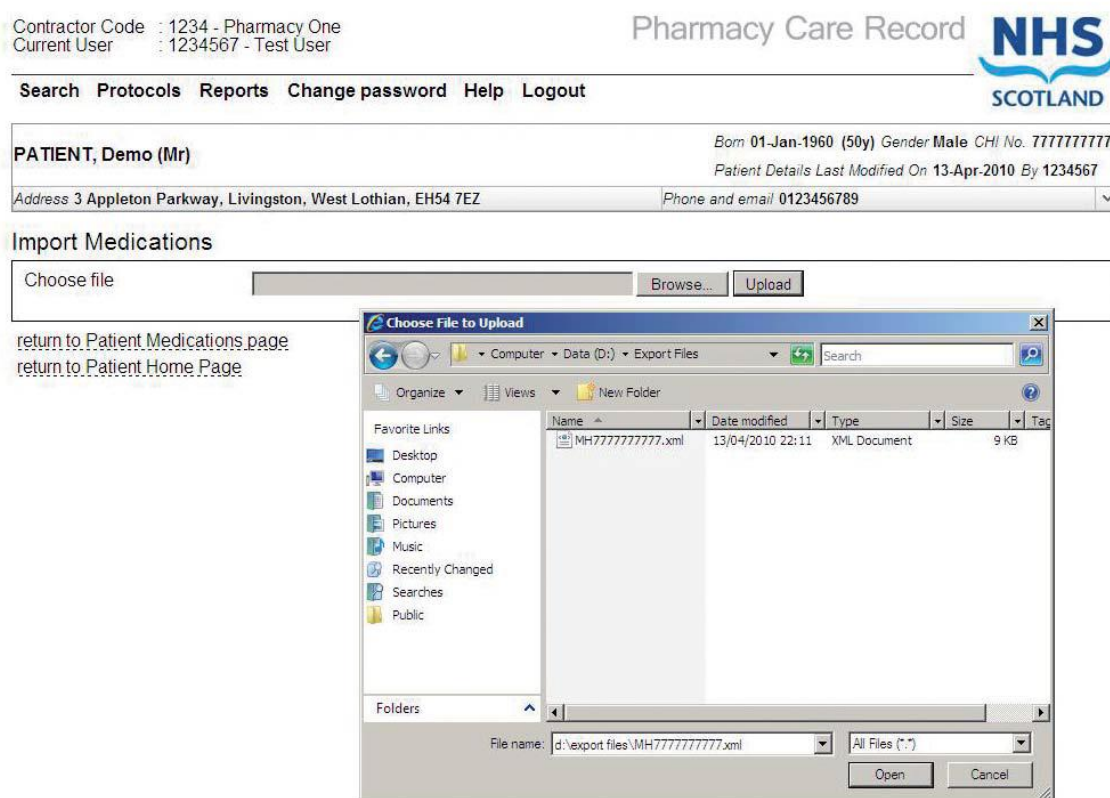


Figure 10-6: PCR medication import page and standard windows file open dialog

If the box is 'greyed out' preventing you from entering information, click the 'Browse' button shown in Figure 10-6. 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 10-6 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 10-7 will be displayed.

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. 3333333333
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

Are you sure you wish to import the medication data of patient PATIENT, Demo (Mr)?

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

Figure 10-7: 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 10-8 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	View
> Chloramphenicol 0.5% eye drops (Co-Pharma)	26-Feb-2010	MAS		13-Apr-2010	1234567	True	View
> Aspirin 75mg Tablets	01-Jan-2010	CPUS		13-Apr-2010	1234567	False	View
> E45 Crm	24-Jun-2009	CMS		13-Apr-2010	1234567	True	View
> Atorvastatin Tabs 40MG	24-Jun-2009	CMS		13-Apr-2010	1234567	True	View
Quantity	Direction		Dispensed on	Imported			
28	Take One Daily		24-Jun-2009	True			
28	Take One Daily		26-May-2009	True			
28	Take One Daily		29-Apr-2009	True			
28	Take One Daily		26-Feb-2009	True			
> Diprobase cream (Schering-Plough Ltd) 50 gram	26-May-2009	other		13-Apr-2010	1234567	True	View
> Xalatan 50micrograms/ml eye drops (Pfizer Ltd) 2.5 ml	26-May-2009	other		13-Apr-2010	1234567	True	View
> Paracetamol 500mg coaplets (Teva UK Ltd) 32 tablet 4 x 8 tablets	26-May-2009	other		13-Apr-2010	1234567	True	View
> Aspirin Tabs 75MG	26-May-2009	AMS		13-Apr-2010	1234567	True	View
> Levothyroxine Tabs 50MICROGRAMS	26-May-2009	AMS		13-Apr-2010	1234567	True	View
Quantity	Direction		Dispensed on	Imported			
112	Take One Three Times A Day		26-May-2009	True			
112	Take One Three Times A Day		29-Apr-2009	True			
> Clinutren Dessert vanilla (Nestle Clinical Nutrition) 500 gram 4 x 125g pots	29-Apr-2009	other		13-Apr-2010	1234567	True	View
> Aspirin Tabs 75MG	29-Apr-2009	AMS		13-Apr-2010	1234567	True	View
> Paracetamol 500mg coaplets (M&A) [DPS=32]	26-Feb-2009	MAS		13-Apr-2010	1234567	True	View

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

[return to Patient Home Page](#)

Figure 10-8: several expanded medication lines

10.3.2 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 10-9 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

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

Figure 10-9: PCR patient medication entry/edit page – editing an imported item

10.3.3 Tidying up medication export files

The export files created by your PMR system will remain on your computer after the data has been imported into the patient's record on PCR. It is advisable to delete these export files once 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 for support.

PCR Code 106

Association Error: Your association request could not be verified by the PCR server (Invalid EPOC). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 107

Association Error: Technical Error - Your association request could not be verified by the PCR server (Invalid signature). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 108

Association Error: Technical Error - Your association request could not be verified by the PCR server (Invalid certificate). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 109

Association Error: Technical Error - Your association request could not be verified by the PCR server (no signature present). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 110

Association Error: Technical Error - Please check that the time and date on your PC is correct. Check and, if necessary, correct the time and date on your computer. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 111

Association Error: Technical Error - No timestamp present in the association message. Please ensure that you have followed all the association steps in the PCR User Guide. If this issue reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 112

Association Error: Technical Error - Your association request could not be processed. The timestamp is not in a valid format. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 113

Association Error: An invalid Contractor Code was entered. If you believe the contractor code to be correct please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 114

Association Error: Technical Error - Your association request could not be verified by the PCR server. (no signature present). Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 300

Application Error: A general error has occurred. If this error reoccurs please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 205

Authentication Error: Incorrect User ID or Password entered when changing password or your account is locked. If you have forgotten your password please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 206

Authentication Error: You are no longer associated with a pharmacy. Please re-associate with a pharmacy before attempting to change your password.

PCR Code 207

Reset Password Error: Your new password must be at least 8 characters and contain at least 1 non-alphanumeric character. Please re-enter a new password.

PCR Code 208

Authentication Error: You do not have permission to access PCR. Please contact the PSD ePharmacy helpdesk on 0131 275 6600 or by email at NSS.PSDHelp@nhs.net for support.

PCR Code 210

Reset Password Error: Your new password must not be the same as your previous password. Please re-enter a new password.

Appendix B: Create PCR shortcut on desktop

Section 1 of the User Guide detailed the URLs (website addresses) for accessing the PCR Association website and the main PCR website. Your 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 10-10)
- Select "Create Shortcut" from the context menu

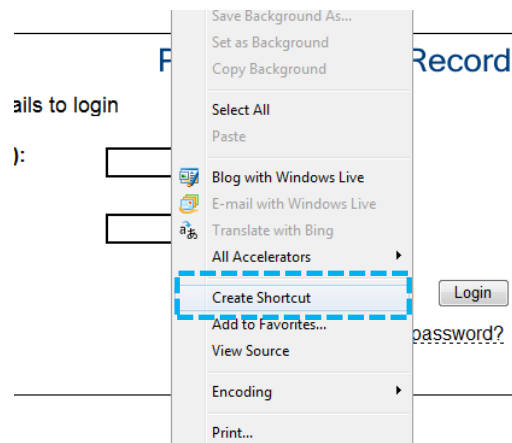


Figure 10-10:right click to "Create shortcut"

- A popup message will be displayed (Figure 10-11)

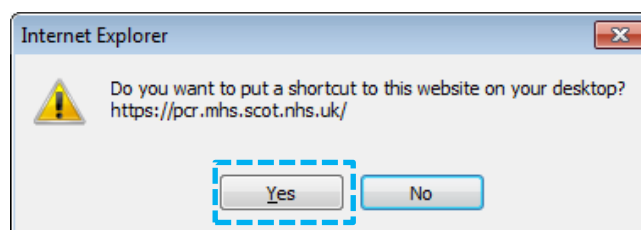


Figure 10-11: Confirm "Create shortcut"

- Select "Yes"
- A shortcut to PCR is placed on your Desktop (Figure 10-12)

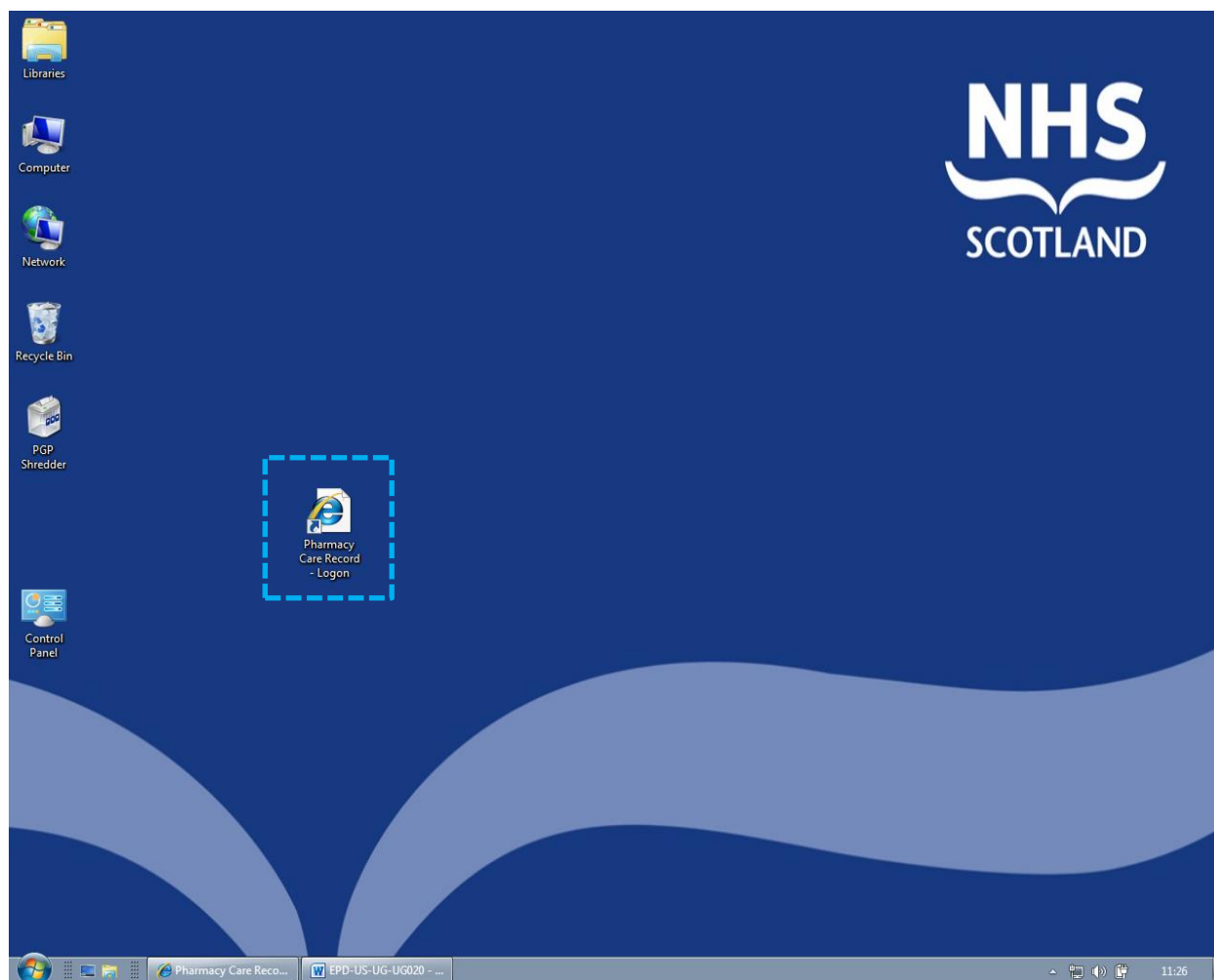


Figure 10-12: PCR Icon on Desktop

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 10-13).

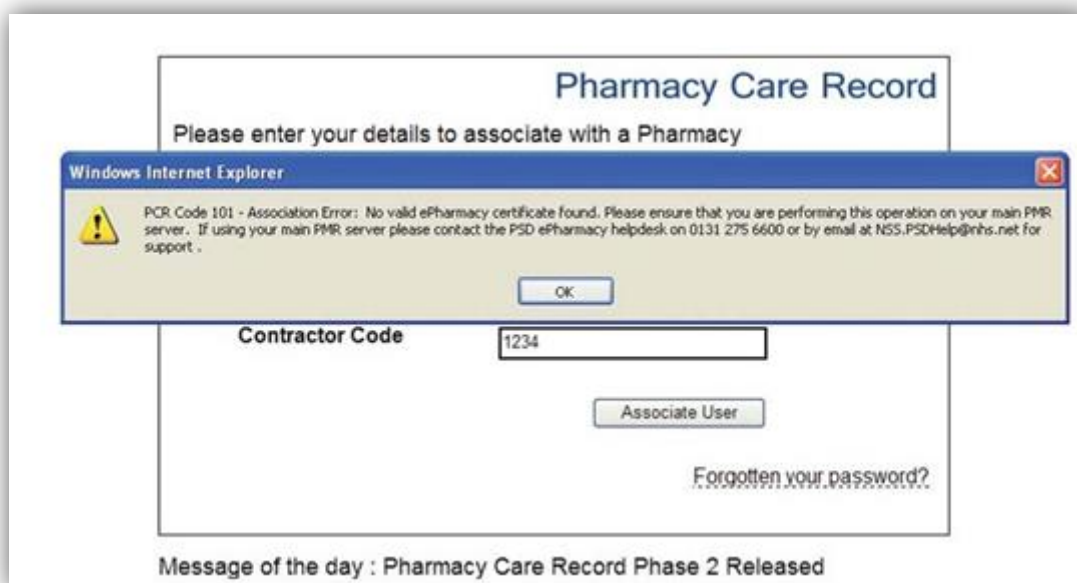


Figure 10-13: Error message if ePharmacy Certificate not present

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 10-13) then you may be able to resolve the issue by adding the PCR Association website to your list of trusted websites.



Figure 10-14: 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 10-15)

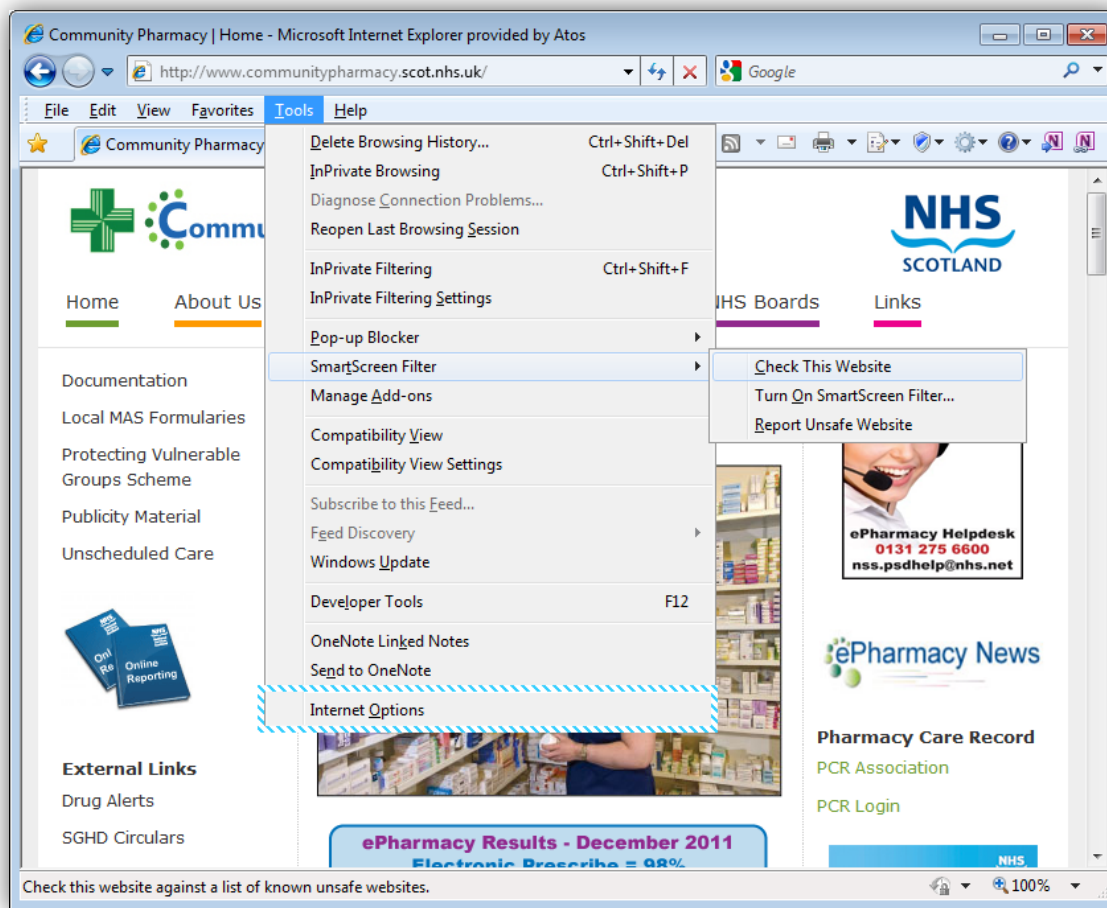


Figure 10-15: Tools > Internet Options (IE8)

- Select the security tab and then select the "Trusted sites" zone (Figure 10-16).

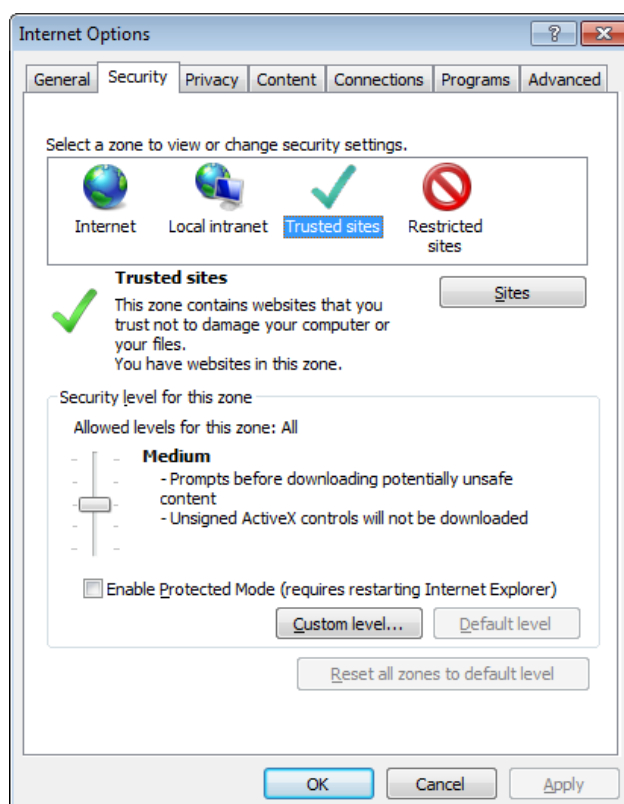
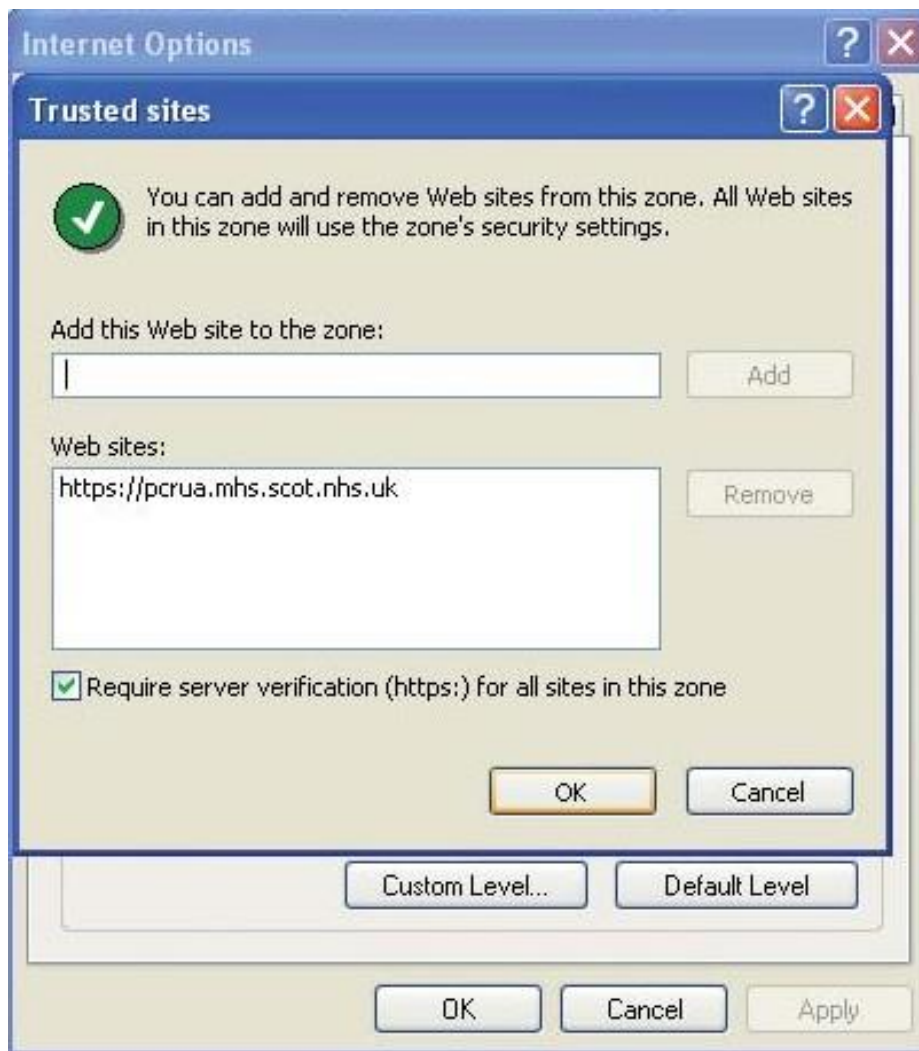


Figure 10-16: Trusted sites zone on security tab

- Click the "Sites" button, the "Trusted" sites dialogue is shown (Figure 10-17)

**Figure 10-17: 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 10-17).
- 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 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

Name: Sally Shortbread Gender: Female	Date of Birth: CHI Number: 5555555555
Contact Details: N/A	Address: 123 Anywhere Street Anytown AN1 3RR Email address: Phone Number:

Medication Profile/Pharmaceutical Care Risk Assessment

Care Issues with the appropriateness of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the formulation of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the dosage and frequency of the medicine/s?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Takes ACE inhibitor and diuretic at tea-time Sub therapeutic dosage of paracetamol
Care Issue with the contraindications?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Drug Interaction with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	

Side effects with one or more medicines?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Night time diuresis as a result of timing of diuretic
Problems with concordance?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	Doesn't always take her diuretic therapy due to concerns about diuresis. Finds it difficult to press out paracetamol tablets from blister pack
Care Issue in relation to polypharmacy?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacokinetic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacodynamic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Disease risk factor?	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Recorded	
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Taking one or more black triangle medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Duplication of medication	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Summary: Are there any pharmaceutical care issues of note?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	

Patient Profile

General Health: Smoker
Medical conditions: Hypertension, Osteoarthritis
Allergies and Sensitivities: None known

Patient Factors: Dispositions

Compromised oral route of administration	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	
Physical Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	<i>Note: suffers with sore hands</i>
Visual Impairment	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	

Patient Factors: Organ Function

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

Patient Factors: Maternal

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

Pharmaceutical Care Plan Priority

PCP Priority:	<input type="radio"/> Low Priority <input checked="" type="radio"/> Medium Priority <input type="radio"/> 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

Name: Bertie Biscuit Gender: Male	Date of Birth: CHI Number: 7777777777
Contact Details: N/A	Address: 124 Anywhere Street Anytown AN1 3RR Email address: Phone Number:

Medication Profile/Pharmaceutical Care Risk Assessment

Care Issues with the appropriateness of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the formulation of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the dosage and frequency of the medicine/s?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue with the contraindications?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Drug Interaction with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	

Side effects with one or more medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Problems with concordance?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Care Issue in relation to polypharmacy?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacokinetic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Pharmacodynamic risk factors?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Disease risk factor?	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Not Recorded	
Taking one or more medicines with a narrow therapeutic range?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Taking one or more black triangle medicines?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Duplication of medication	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<input type="radio"/> Not Recorded	
Summary: Are there any pharmaceutical care issues of note?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Recorded	<i>Has poor knowledge of rationale of medicines and this may lead to compliance problems</i>

Patient Profile

General Health: Overweight, smoker, poor vision due to cataracts
Medical conditions: Diabetes, Hypertension
Allergies and Sensitivities: None known

Patient Factors: Dispositions

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

Patient Factors: Organ Function

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

Patient Factors: Maternal

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

Pharmaceutical Care Plan Priority

PCP Priority: <input type="radio"/> Low Priority <input checked="" type="radio"/> Medium Priority <input type="radio"/> High Priority	<i>Improve patient's understanding of their medicines to prevent any potential compliance problems</i>
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Care Plan

Care Issue	Desired outcome	Action	Action by (Pharmacist, GP, Nurse, Patient)	Response
Poor understanding of rationale of medicines for diabetes and hypertension	Improve patient's understanding of the rationale of their current therapy	Counsel patient accordingly	Pharmacist	Patient has better understanding of each therapy and its importance
Patient has poor vision – due to cataracts	Ensure that the patient can read any appropriate patient information e.g. medication labels	Discuss the patient's ability to read labels	Pharmacist	Provide large print labels if necessary
Patient is a smoker	Encourage and support the patient to stop smoking	Discuss risks of smoking with patient	Pharmacist	Patient is enrolled on the PHS smoking cessation service
Patient is overweight	Reduce patient's weight through lifestyle changes	Provide lifestyle advice e.g. weight loss, exercise, alcohol intake	Pharmacist	Patient starting a regular exercise regimen

Test Patient 3: Mr Colin Cracker

Patient Details

Name: Colin Cracker Gender: Male	Date of Birth: CHI Number: 9999999999
Contact Details: N/A	Address: 125 Anywhere Street Anytown AN1 3RR Email address: Phone Number:

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

General Health: Smoker. Suffers occasional chest infections
Medical conditions: COPD, Osteoarthritis
Allergies and Sensitivities: None known

Patient Factors: Dispositions

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

Patient Factors: Organ Function

Hepatic function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Renal function:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	
Lung function:	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input type="radio"/> Not Recorded	Patient has COPD and smokes which will impact on lung function.
Immune status:	<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Not Recorded	

Patient Factors: Maternal

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

Pharmaceutical Care Plan Priority

PCP Priority:	<input type="radio"/> Low Priority <input type="radio"/> Medium Priority <input checked="" type="radio"/> High Priority	<p>Improve inhaler technique.</p> <p>Provide smoking cessation advice and support.</p>
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Care Plan

Care Issue	Desired outcome	Action	Action by (Pharmacist, GP, Nurse, Patient)	Response
Poor MDI inhaler technique leading to overuse of salbutamol inhaler	Improve inhaler technique or consider a spacer or an alternative type of inhaler	Teach better inhaler technique and review progress	Pharmacist	Technique much improved and patient reporting better control of COPD
Patient is a smoker	Encourage and support the patient to stop smoking	Discuss risks of smoking with patient and offer to	Pharmacist	Patient enrolled on the PHS smoking cessation service
Lifestyle risk factor (patient slightly overweight)	Reduce risk factors	Provide lifestyle advice e.g. healthy diet, take regular exercise, alcohol intake	Pharmacist	Patient is taking more exercise and has lost weight