



NEO 360

Opioid Substitution Therapy (OST) Module
User Guide

NHS Lanarkshire Version 1.0

September 2019

Prepared Duncan Hill

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1. Accessing The Module

- <https://scotlandneo.co.uk/secure/>
- Enter Username and Password
- Click Login

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HOME
Version 8.53.1
TEST SYSTEM

LOGIN

LOGIN DETAILS

Username:

Password:

Login

Login Details
Please enter your username and password to login to the system.

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2. Homepage

- Gives information on when module was last accessed
- This will also provide a warning notifying of any outstanding claims and the months they relate to as a prompt to make those missed claims
- ORT module is at top left hand corner – click to open

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HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

CHANGE DETAILS

ORT

HOME PAGE

WELCOME LAURA WILSON

Created On: Wednesday, 30 March 2016 16:50
Last Visited: Monday, 08 August 2016 10:29

Notes
Please use the above menu to navigate throughout the system.

SUPPORT INFORMATION

If you are experiencing problems with neo and would like raise a support call, please contact;

MAIN CONTACT

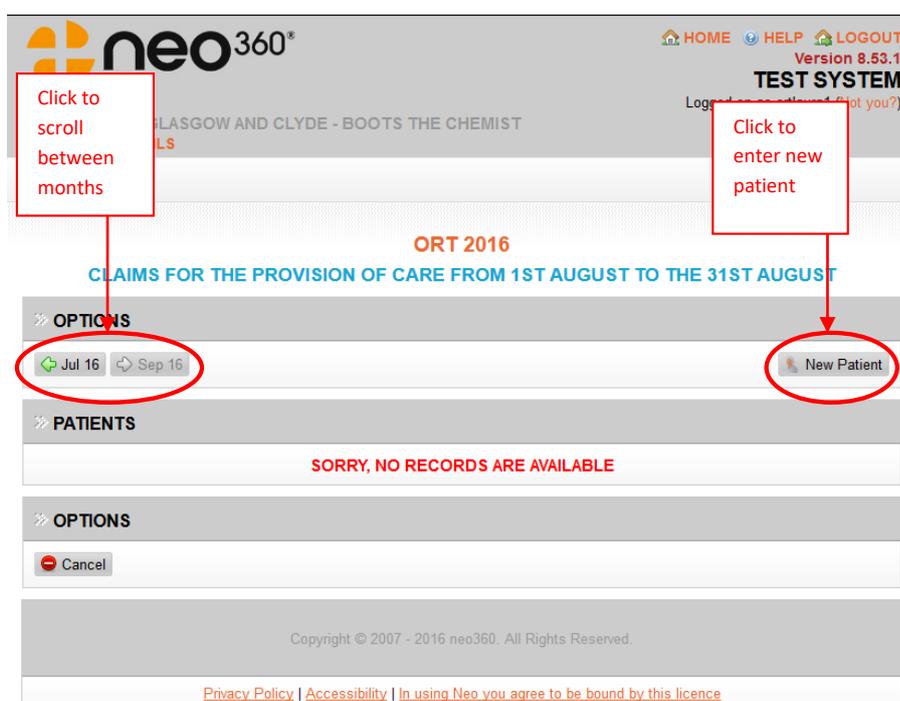
Full Name: John Campbell
Office: 0141 277 7660

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3. Current Claim

- Module will open at current months claim
- The dates to which this claim applies are stated in blue near the top of the page
- When you first access the module there will be no patient information present, as shown below
- Under 'Options', you can scroll between the current month and previous months or you can enter a new patient



4. Entering patients details

- If you click the new patient tab, it will take you to the screen shown below
- The first time you access the module there will be no patient list. Current patients will need to be added prior to the first submissions date to ensure accurate payment. Once you have made these initial entries, the patient list will be carried forward into next month's claim (unless you have selected to remove them from next month's list)
- After the first month you will only ever need to enter new/returning patients who come to your pharmacy, however, to roll forward, details must be entered in the current month. If you are working on the previous months claim to be sent and are entering new patients, they WILL NOT roll forward. You must enter the details in the current month as well.
- Enter their first name, last name

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Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

UK
NHS GREATER GLASGOW AND CLYDE - BOOTS THE CHEMIST
CHANGE DETAILS

ORT

ORT 2016
NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS

★ First Name:

★ Last Name:

★ Do you have a CHI Number? Yes No

OPTIONS

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- If the CHI number is available, select 'Yes' and enter it underneath

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CHANGE DETAILS

ORT

ORT 2016
NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS

★ First Name:

★ Last Name:

★ Do you have a CHI Number? Yes No

★ CHI Number:

OPTIONS

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- If the CHI number is not available, select 'No' and enter the patient's date of birth, you can amend this once you have the patients CHI number

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TEST SYSTEM
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CHANGE DETAILS

ORT

ORT 2016
NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS

★ First Name: Mickey
★ Last Name: Mouse
★ Do you have a CHI Number? Yes No
★ Date of Birth: 01/01/1975 (DD/MM/YYYY)

OPTIONS

Save Save & Add a New Patient Cancel

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- The medication prescribed is selected from the drop down list below the prompt for CHI or Date of Birth, please select from list
- Once patient details have been entered you can select 'Save' or 'Save & add a new patient'
- If you click 'Save', the system will ask you to confirm everything is correct, if you select 'No' it will take you back to the 'Patient details' screen to amend

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TEST SYSTEM
Logged on as ortlaura1 (Not you?)

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CHANGE DETAILS

ORT

ORT 2016
NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS

★ First Name: Mickey
★ Last Name: Mouse
★ Do you have a CHI Number? Yes No
★ Date of Birth: 01/01/1975 (DD/MM/YYYY)

OPTIONS

Save Save & Add a New Patient

SAVE CHANGES?
Are you sure everything is correct?
Yes No

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- If you select 'Yes', it will show the patients details entered under this month's claim
- New patient details should only ever be entered AFTER you have provided a service for them and not in anticipation of them attending

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CHANGE DETAILS
ORT

HOME HELP LOGOUT
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TEST SYSTEM
Logged on as ortlaura1 (Not you?)

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST AUGUST TO THE 31ST AUGUST

OPTIONS
Jul 16 Sep 16 New Patient

Last Name	First Name	CHI Number / DoB	Service Provided	Remove From Next Month's List
Mouse	Mickey	222222222	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Total Number of Patients Service Provided To: 1
Total Amount Payable: £1.00

OPTIONS
Save Cancel Print

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- If you select 'Save & enter a new patient', the system will ask you to confirm the information you have entered is correct
- If you select 'No', you will be returned to the patient details page to amend any errors

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CHANGE DETAILS
ORT

HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

ORT 2016
NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS
★ First Name: Mickey
★ Last Name: Mouse
★ Do you have a CHI Number? Yes No
★ CHI Number: 222222222

OPTIONS
Save Save & Add a New Patient

SAVE CHANGES?
Are you sure everything is correct?
Yes No

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- If you select 'Yes', under 'Status' it will show you the name and CHI number of the last patient details entered and confirm these have been saved
- Under this you will see the 'Patient details' section and you can enter your next patient and repeat the steps as above

The screenshot shows the neo360 patient entry interface. At the top, there is a navigation bar with 'HOME', 'HELP', and 'LOGOUT' links, and the text 'Version 8.53.1 TEST SYSTEM'. Below this, the user is logged in as 'ortlaura1 (Not you?)'. The main header includes the 'neo360' logo and 'UK NHS GREATER GLASGOW AND CLYDE - BOOTS THE CHEMIST'. A 'CHANGE DETAILS' link is visible. The form is titled 'ORT' and 'ORT 2016 NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST'. A green message states 'PATIENT DETAILS MICKEY MOUSE (2222222222) WAS SAVED'. The 'PATIENT DETAILS' section includes fields for 'First Name', 'Last Name', and 'Do you have a CHI Number?'. The 'OPTIONS' section contains 'Save', 'Save & Add a New Patient', and 'Cancel' buttons. A red box highlights the 'First Name' field with the text 'Enter next new patient details here'. Another red box highlights the 'ORT 2016' title with the text 'Details of last patient saved'.

- If you enter a CHI number which already exists, the following error message will appear and you will need to amend the CHI before saving again

The screenshot shows the neo360 patient entry interface with an error message. The top navigation bar and header are identical to the previous screenshot. The form title is 'ORT 2016 NEW PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST'. A red error banner at the top of the form area reads 'ERROR(S)'. Below this, a message says 'Please correct the following error(s):' followed by a list item: '• CHI Number already exist'. The 'PATIENT DETAILS' section shows the 'First Name' as 'Donald', 'Last Name' as 'Duck', and 'Do you have a CHI Number?' as 'Yes'. The 'CHI Number' field contains '2222222222' and has a red error icon. The 'OPTIONS' section contains 'Save', 'Save & Add a New Patient', and 'Cancel' buttons. A red box highlights the error message. The footer contains copyright information and links for 'Privacy Policy', 'Accessibility', and 'In using Neo you agree to be bound by this licence'.

- The system will also recognise if the CHI number entered is not valid or active and you will be directed to amend.
- If the CHI is in use at another pharmacy please enter the date of birth, and enter CHI the following month when they are no longer active at the other pharmacy.

5. Current patient list

- Once you have entered and saved all current patients details you can view your claim list
- For all patients who have received an OST service over the relevant month the 'service provided' box must be ticked, and the 'save' button at the bottom left clicked, prior to submission
- Underneath the patient list there is information on the total number of patients being claimed for and the total value of the claim, this will only appear if you have saved the claim. If you do not save the claim the totals will remain at zero and you will not be paid anything for that months claim

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CHANGE DETAILS

HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

ORT

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST AUGUST TO THE 31ST AUGUST

OPTIONS
Jul 16 Sep 16 New Patient

PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided
Duck	Daisy	3333333333	<input checked="" type="checkbox"/>
Duck	Donald	1111111111	<input checked="" type="checkbox"/>
Mouse	Mickey	2222222222	<input type="checkbox"/>
Mouse	Minnie	8888888888	<input checked="" type="checkbox"/>
Thumb	Tom	5555555555	<input type="checkbox"/>

Total Number of Patients Service Provided To: 5
Total Amount Payable: £5.00

OPTIONS
Save Cancel

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Boxes ticked to show that a service has been provided and you are claiming a fee

Number of patients who have been ticked as having had a service provided and total value of claim

- If you know that a patient you have been providing a service for will be leaving, has left or was only provided this service as a one-off, you should tick the 'Remove from next month's list' box. This will mean that patient will not be carried over into the next month's claim



[HOME](#) [HELP](#) [LOGOUT](#)
Version 8.53.1
TEST SYSTEM
 Logged on as ortlaura1 (Not you?)

UK
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[CHANGE DETAILS](#)

ORT

ORT 2016

CLAIMS FOR THE PROVISION OF CARE FROM 1ST AUGUST TO THE 31ST AUGUST

OPTIONS

← Jul 16 → Sep 16 New Patient

PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided	Remove From Next Month's List
 Duck	Daisy	3333333333	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Duck	Donald	1111111111	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Mouse	Mickey	2222222222	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Mouse	Minnie	8888888888	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Thumb	Tom	5555555555	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Total Number of Patients Service Provided To: 5
Total Amount Payable: £5.00

OPTIONS

Save Cancel Print

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- If they return to your pharmacy and you once again provide them with an OST service you simply re-enter their details as if a new patient
- To the left of each patient's name is a box with a pencil symbol in it. If you click on this you can edit the patient's details

Last Name	First Name	CHI Number / DoB	Service Provided	Remove From Next Month's List
 Duck	Daisy	3333333333	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Duck	Donald	1111111111	<input checked="" type="checkbox"/>	<input type="checkbox"/>
 Mouse	Mickey	2222222222	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- You can amend their name if it was entered incorrectly
- You can delete the patient completely if they were entered in error
- You can amend a date of birth to CHI when it is received. If a patient's details are entered with only a date of birth, this will appear highlighted in red until you amend and change it to the CHI number
- You can amend the medication prescribed if there is a change to the patients treatment

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HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

CHANGE DETAILS

ORT

ORT 2016
EDIT PATIENT FOR 1ST AUGUST TO THE 31ST AUGUST

PATIENT DETAILS

★ First Name: Minnie
★ Last Name: Mouse
★ Do you have a CHI Number? Yes No
★ Date of Birth: 02/02/1999 (DD/MM/YYYY)

OPTIONS

Save Delete Cancel

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- Once you have amended the details, click and save and the new details will be shown on your claim list

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HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

CHANGE DETAILS

ORT

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST AUGUST TO THE 31ST AUGUST

OPTIONS

Jul 16 Sep 16 Date of birth now changed to CHI New Patient

PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided	Remove From Next Month's List
Duck	Daisy	3333333333	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Duck	Donald	1111111111	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mouse	Mickey	2222222222	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mouse	Minnie	8888888888	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Thumb	Tom	5555555555	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Total Number of Patients Service Provided To: 5
Total Amount Payable: £5.00

OPTIONS

Save Cancel Print

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6. Claiming

- Claims cannot be submitted before the first of the following month
- DO NOT submit claims using the Managerial or IEP log in details, they will be refused, you will have to resubmit and may miss the payment deadline
- On the first day of the month a new claim page will appear with all the patients details carried over from the previous month
- This new claim page becomes your current claim list and will not have a 'Submit Claim' button
- The 'Service provided' boxes will not be ticked as these patients are not new
- The person completing the claim prior to submission must check that an OST service has indeed been provided for each of these patients during the month the claim relates to and ensure the relevant boxes are ticked

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CHANGE DETAILS

HOME HELP LOGOUT
Version 8.53.1
TEST SYSTEM
Logged on as orlaura1 (Not you?)

ORT

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST AUGUST 2016

OPTIONS
Jul 18 Sep 16

PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided	Remove From Next Month's List
Duck	Daisy	3333333333	<input type="checkbox"/>	<input type="checkbox"/>
Duck	Donald	1111111111	<input type="checkbox"/>	<input type="checkbox"/>
Mouse	Mickey	2222222222	<input type="checkbox"/>	<input type="checkbox"/>
Mouse	Minnie	8888888888	<input type="checkbox"/>	<input type="checkbox"/>

Total Number of Patients Service Provided To: 4
Total Amount Payable: £4.00

OPTIONS
Save Cancel Print

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- To submit a claim, click the button on the top left to scroll back to the relevant month
- **Please note the counter fraud declaration in red.** The person logged in to submit the claim has responsibility for ensuring that what they are claiming for is accurate. They will be the person we contact if there are any queries regarding a particular claim
- The submit claim button is underneath the declaration



[HOME](#) [HELP](#) [LOGOUT](#)
 Version 8.53.1
TEST SYSTEM
 Logged on as ortlaura1 (Not you?)

UK
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[CHANGE DETAILS](#)

ORT

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST JULY TO THE 31ST JULY

> OPTIONS

> PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided
Duck	Daisy	3333333333	<input checked="" type="checkbox"/>
duck	donald	1111111111	<input checked="" type="checkbox"/>
Mouse	Mickey	2222222222	<input checked="" type="checkbox"/>
Mouse	Minnie	02/02/1980	<input checked="" type="checkbox"/>

Total Number of Patients Service Provided To: 4
 Total Amount Payable: £4.00

> PAYMENT

COUNTER FRAUD DECLARATION: I ACCEPT THAT THE INFORMATION PROVIDED ON THIS FORM MAY BE USED TO VERIFY THE CLAIM AND MAY BE SHARED WITH OTHER BODIES/AGENCIES FOR THE PURPOSES OF PREVENTION AND DETECTION OF CRIME. IN SIGNING THIS FORM, I CONSENT TO THIS USE AND ACKNOWLEDGE THAT IF I PROVIDE FALSE INFORMATION THEN I MAY BE LIABLE TO CRIMINAL PROSECUTION, REFERRAL TO MY PROFESSIONAL BODY AND/OR RECOVERY PROCEEDINGS

> OPTIONS

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- Once you click 'Submit claim' you will be asked to confirm that the information you are submitting is correct
- If you select 'yes' your claim will be submitted and details of the person submitting the claim will be displayed at the bottom
- If you select 'No' you will be taken back to the claim screen and amendments can be made
- To be eligible for payment claims must be submitted by the 10th of the following month.
- If you do not click the 'submit claim' button, your claim will not be sent and will not be eligible for payment.

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Version 8.53.1
TEST SYSTEM
Logged on as ortlaura1 (Not you?)

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CHANGE DETAILS

ORT

ORT 2016
CLAIMS FOR THE PROVISION OF CARE FROM 1ST JULY TO THE 31ST JULY

STATUS
DATA SAVED

OPTIONS
Jun 16 Aug 16

PATIENTS

Last Name	First Name	CHI Number / DoB	Service Provided
Duck	Daisy	3333333333	✓
duck	donald	1111111111	✓
Mouse	Mickey	2222222222	✓
Mouse	Minnie	02/02/1980	✓

Total Number of Patients Service Provided To: 4
Total Amount Payable: £4.00

CLAIM
FORM WAS SUBMITTED ON MONDAY, 08 AUGUST 2016 BY LAURA WILSON (4345545)

OPTIONS
Cancel Print

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- You can go back and review claims that have been submitted and print them out for your records but they cannot be amended
- If you realise an error has been made in your submission and it is before the 10th of the month (e.g. ticked a box for a patient who did not attend your pharmacy, did not tick a box for a patient who accessed the OST service or forgot to enter a patients details) and the claim is now read only you must contact the Substance Misuse Pharmacy Team on 07920 711131 for advice. If it is after the 10th of the month, these claims will have been forwarded for payment and you need to contact the Substance Misuse Pharmacy Team on 07920 711131.
- Whoever then signs on to the system will need to carry out their own edit **AND** check **ALL** entries are correct. They will then need to resubmit agreeing to the counterfraud declaration. At this point they will become the person responsible for that claim

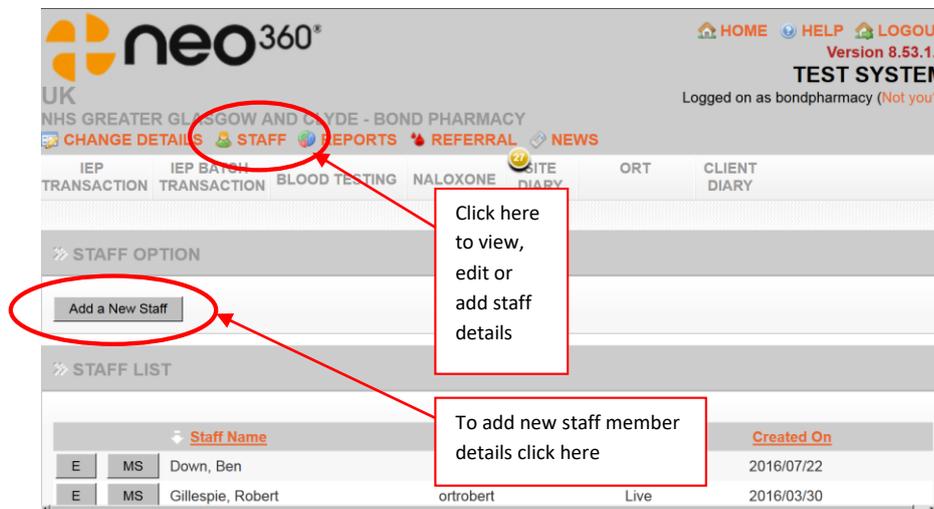
7. Registering new staff to access the module

For each pharmacy providing an OST service there will be a site manager, this will be the pharmacy manager or regular pharmacist. The site manager will then be responsible for creating individual staff usernames and passwords using the managerial log in.

Only staff with an active GPhC registration number can be registered to access the ORT module.

It is the responsibility of each individual to keep their username and password secure and not share the information with anyone else. Remember the module contains patient identifiable information so must be kept as secure as possible.

- Log in using the managerial log in details
- Staff option is available near the top of the screen, circled below



- Enter first name, last name, email address and General Pharmaceutical Council registration number
- An email address may only be used once within the module, for the managerial log in we strongly recommend using the pharmacy clinical mailbox address and for personal log ins, a work or personal email address that only that staff member can access. The email addresses are only used when the staff member has forgotten their password and it needs reset.
- Create a memorable username and password, these must comply with the requirements of NEO which are stated on the right hand side
- Select live, if staff member leaves or is off long term their account should be changed to disabled until such times as it is required again
- Select ORT module
- **Do not select any other modules without contacting the system administrator**
- **Do not grant any other staff member access to staff details, only the site manager should have this access**
- If the staff member will be registered at more than one pharmacy separate user names will need to be created at each location. We would recommend this takes the form of the staff members name and postcode of the site e.g. Mickeymouseg511dh

Permissions

- Client Diary
- Naloxone
- News
- IEP Batch Transaction
- IEP Transaction
- IEP Transaction Register Only
- Report
- Site Diary
- Staff
- Blood Testing
- View Referral
- ORT**

Only select this module for each staff

STAFF - OPTIONS

Save Back To Staff Section

- Save the changes you have made
- Staff member will now be able to log on and should see ORT module at the top left of the screen. Staff will only see the modules for which they have been granted access so this will vary from person to person

If the site manager leaves they must pass on the site manager username and password to whoever takes over from them. The new site manager should then create a new password for security reasons and check that the email address associated with the managerial log in is the store email address and not a personal email address.

Full details on the NEO360 system can be found in the 'HELP' section

8. Useful contact details

Duncan Hill	Duncan.hill@lanarkshire.scot.nhs.uk	07920 711131