# CLEO SOLO EPS Clinical User Guide

## Document Updates

| Version | Date | Amendment Notes | Name | Role |
|---|---|---|---|---|
| v2.0 | 02/08/2023 | The following sections have been added/updated in this document:<br>5.1.4. Clearing the Search<br>5.2.5. Interaction Prompts<br>5.2.6. Duplicate Ingredient Prompts<br>5.2.7. Duplicate Item Prompts<br>5.2.8. Drug Equivalent Prompts<br>5.2.9. Items Prescribed within the Last 24 Hours Prompt<br>5.2.10. Latin Abbreviation Short Codes | Ben Smythson | Systems Analyst/Trainer |
| v2.1 | 30/10/2023 | The following section has been removed as functionality is no longer available in integration mode and soon to be decommissioned from Standalone mode ("Unconfirmed Scripts view").<br>5.10. Automatic Cancellation<br>An addendum (**PLEASE NOTE)** on the "Unconfirmed Scripts" view removal has been made to the 6.0 Cancelling an EPS Prescription section, page 55 | Sara Malavasi | Product Owner |
| V2.2 | 12/12/2023 | Amendment to 3.1. Search by NHS Number<br>Addendum (**PLEASE NOTE)** on the "Unconfirmed Scripts" view removal has been removed as per functionality being decommissioned. | Sara Malavasi | Product Owner |

| | | | | |
|---|---|---|---|---|
| | | The following sections have been added/updated in this document:<br>5.1. Prescribing Interface<br>5.1.1 GP Connect Interface<br>5.2.9. Methadone Prescribing Prompt<br>5.2.1. Medication Pack Sizes<br>5.4. Choosing a Pharmacy<br>5.7. Copy Prescription Information<br>7.0. Inactivity Timeout | | |
| V2.3 | 24/04/2023 | Update on wording and spell check | Sara Malavasi | Product Owner |

## Document Reviewers

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| Susan Spriggs | sspriggs | Head of Systems Development | 24.04.2024 | v2.3 |
| Karen Ventura | KV | Product Director | 24.04.2024 | v2.3 |

## Document Approval

| Name | Signature | Title / Responsibility | Approved Date | Version |
|---|---|---|---|---|
| Karen Ventura | K ventura | Product Director | 24.04.2024 | v2.3 |

## Glossary of Terms

| Acronym | Definition |
|---|---|
| **EPS** | Electronic Prescription Service |
| **PDS** | Patient Demographic Service |
| **dm+d** | Dictionary of Medicines and Devices – The NHS standard dictionary for medicines licensed in the UK |
| **FHIR** | Fast Healthcare Interoperability Resources – An NHS global industry standard for passing healthcare data between systems |

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# 1.0. Introduction

Developed as a Covid-19 response to enable instant e-prescribing capability. CLEO SOLO EPS enables clinicians to prescribe right away with seamless Spine integration working alongside the existing clinical or pharmacy system.

The solution is intuitive to use with only a supporting instruction video covering everything needed for your clinicians to get going.

## 2.0. Accessing CLEO SOLO EPS

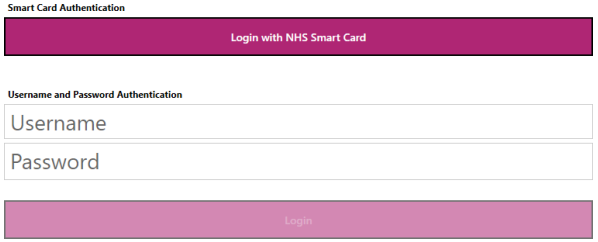
Prior to launching the CLEO SOLO EPS application, the user must begin by inserting and authenticating their NHS smartcard. The three roles that permit prescribing are: R8000, R8001 and R8003. The user must select one of the roles when authenticating their smartcard.

Once the clinical user has authenticated their NHS smartcard and selected the appropriate clinical smartcard role, they will need to open the CLEO SOLO EPS application by double clicking on the following desktop icon:

**PLEASE NOTE**: Clinical users must be logged on to CLEO SOLO EPS with their NHS smartcard to use CLEO SOLO EPS application.

When conducting UAT (User Acceptance Testing), users will use integration (INT) smartcards and must logging into the integration environment.

The user must click the 'Login with NHS Smart Card' button.



## 2.1. Roles (These are dependent on the types of prescriber within the organisation)

### 2.1.1. Medical Prescriber

To login as this role, users must authenticate with the following smartcard role: **R8000 – Clinical Practitioner Access Role**

This role relates to the following EPS Prescription Type Code: **1001 – Outpatient Community Prescriber – Medical Prescriber**

### 2.1.2. Nurse Independent/Supplementary Prescriber

To login as this role, users must authenticate with the following smartcard role: **R8001 – Nurse Access Role**

This role relates to the following EPS Prescription Type Code: **1004 – Outpatient Community Prescriber – Nurse Independent/Supplementary Prescriber**

### 2.1.3. Community Practitioner Nurse Prescriber

To login as this role, users must authenticate with the following smartcard role: **R8001 – Nurse Access Role**

This role relates to the following EPS Prescription Type Code: **1005 – Outpatient Community Prescriber – Community Practitioner Nurse Prescriber**

### 2.1.4. Pharmacist Independent/Supplementary Prescriber

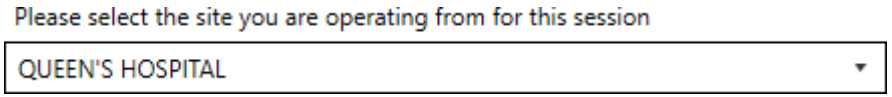
To login as this role, users must authenticate with the following smartcard role: **R8003 – Health Professional Access Role**

This role relates to the following EPS Prescription Type Code: **1008 – Outpatient Community Prescriber – Pharmacist Independent/Supplementary Prescriber**

## 2.2. Site Selection

After selecting the appropriate role, users must then select an appropriate site they wish to prescribe from. The site will be dependent on the organisation type and may relate to a hospital, pharmacy or other settings. (This document makes reference to departments too – which are also organisation dependent and might not be available to all).

**Important Notes:** For pharmacies users, please ensure that the Site selected to log in has the right ODS code assigned. The ODS code will follow the Site name when displayed.




**Important Notes:**

- All site assignments are handled by the User Administrator for the appropriate site.
- The site selected will determine the costing and organisational data that is applied to any generated prescription once logged in. This is configured within the administration module.

## 2.3. Department Selection

After selecting the appropriate site, users can then select a department from the department menu if available.

**Important Notes:**

- Department assignments are handled by the User Administrator for the appropriate site.
- The department selected will determine the costing and organisational data that is applied to any generated prescription once logged in. This is configured within the administration module.

The user will be required to click 'I Agree' to access the application.

Clicking 'I Agree' confirms the user has accepted the displayed declaration for accessing the system.

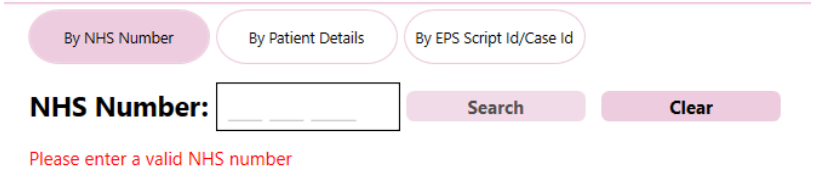
Clicking 'I Disagree' will take the user back to the login page.

# 3.0. Patient Search

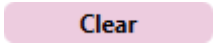
To begin a prescription session, users must first match a patient to the national Personal Demographic Service (PDS). The application supports the following search methods.

## 3.1. Search by NHS Number

Selecting “By NHS Number”, entering the patient’s NHS number and clicking “Search”. This will carry out a search within the PDS.



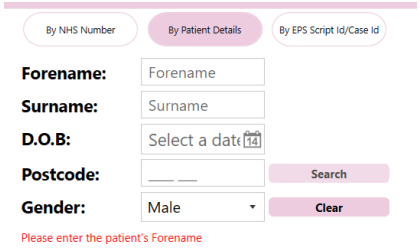

If users wish to begin the search again, the “Clear” button will clear all data that has been currently input into the search fields.




## 3.2. Search by Patient Demographics

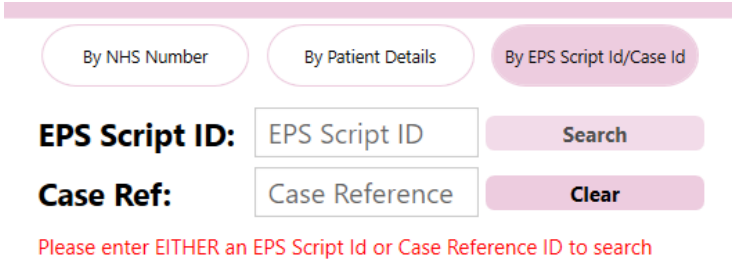
Selecting “By Patient Details”, entering the patient’s forename, surname, date of birth, home postcode, selecting gender and clicking “Search”. This will carry out a search within the PDS.

**Important Note:** All fields are mandatory for this search to take place.



## 3.3. Search by Script ID or Case Reference

Selecting “By EPS Script ID/Case ID”, entering either the EPS prescription ID or a case reference (relating to a previously created EPS prescription) and clicking “Search”. This will search the local database for any previously issued EPS prescriptions/cases.



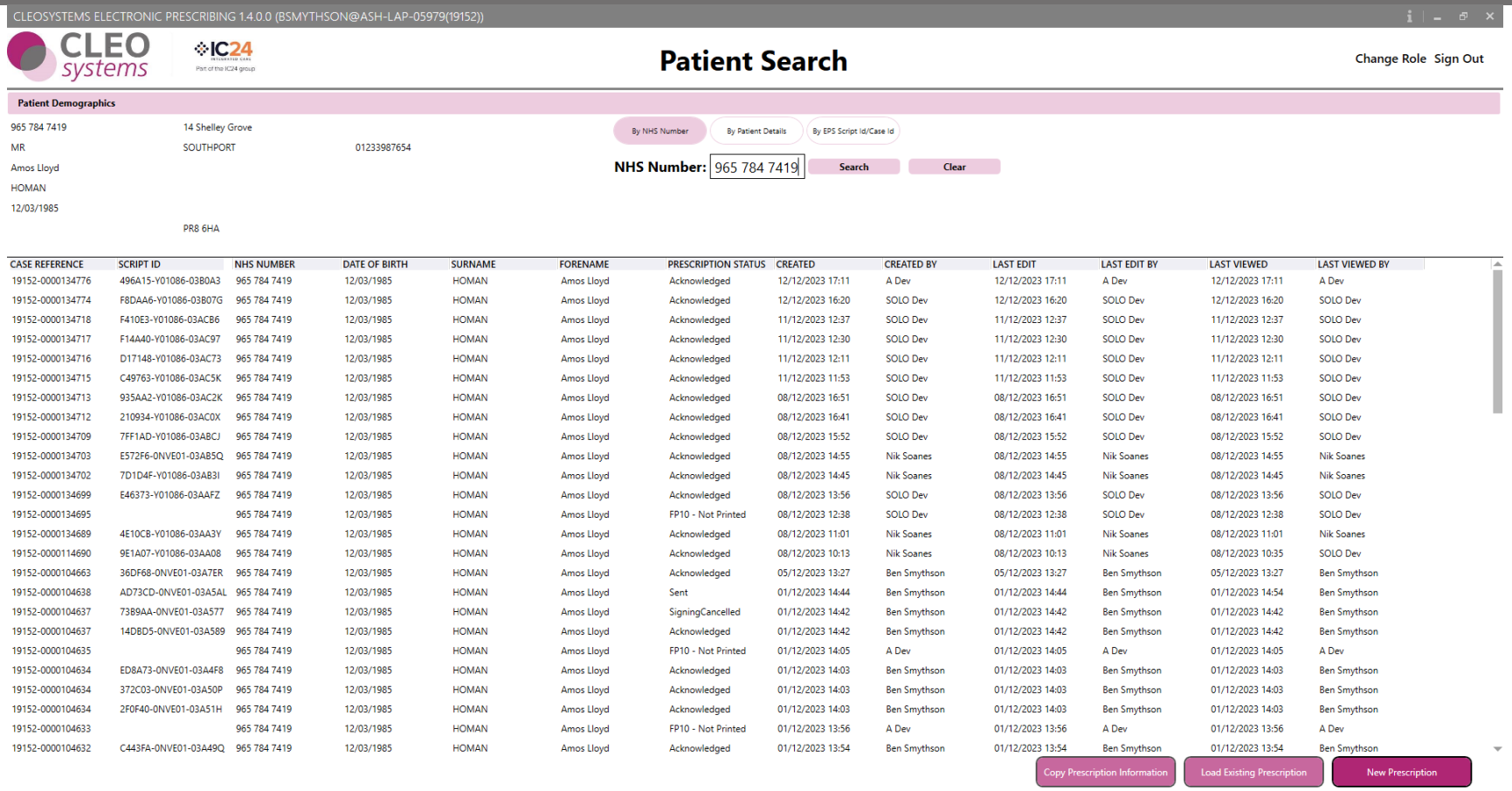

## 3.4. Patient Search Results

### 3.4.1. Successful Patient Search

Once users have performed a search via one of the above methods and a patient has been matched, all scripts generated for the patient will be displayed within the view.

**Important Note:** Only prescriptions generated within the CLEO SOLO EPS application will be displayed in this view.

Users will be required to check the demographic details in the top left-hand corner of the view and confirm this is the correct patient before proceeding.




## 3.4.2. Unsuccessful Patient Search

### 3.4.2.1. No Results for Search Criteria

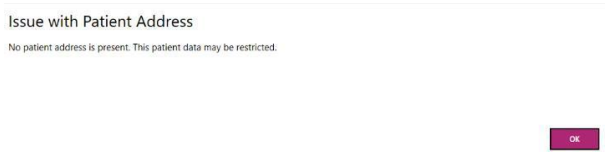
If there are no patients found that match the detail that has been entered into the search fields, the below prompt will display. Should the patient not return, users should refer to their local Standard Operational Process.

### 3.4.2.2. Deceased Patients

Users will be unable to prescribe for patients that have been flagged as deceased on the Spine. If they search for a patient that has been flagged as deceased on their PDS record, the following prompt will be displayed:

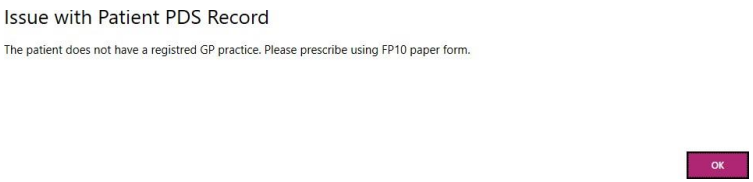
### 3.4.2.3. Sensitive Patients

Users will be unable to prescribe for patients that have been flagged as sensitive on their PDS record. If they search for a patient that has been flagged as sensitive, the following prompt will be displayed:




### 3.4.2.4. Patients with no Registered GP Practice

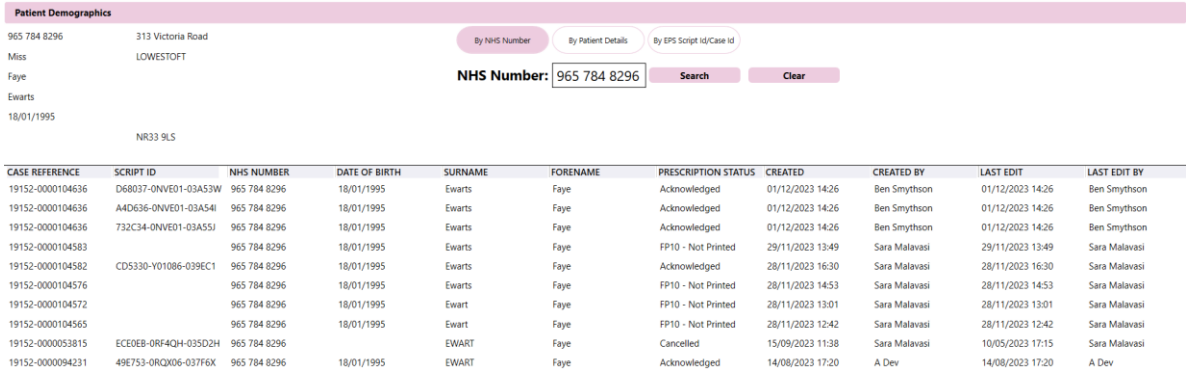
Users will be unable to prescribe for patients that do not have a GP practice registered against their PDS record. If they search for a patient with no GP practice registered on the PDS, they will be displayed the following prompt:



Users are then required to proceed with a paper FP10 prescription, if the option is available to the organisation.

## 4.0. Prescription Statuses

The Prescription Status column will confirm the status of previously issued prescriptions.



Patient Demographics

965 784 8296 | 313 Victoria Road
Miss | LOWESTOFT
Faye
Ewarts
18/01/1995
NR33 9LS

By NHS Number | By Patient Details | By EPS Script Id/Case Id

NHS Number: 965 784 8296 | Search | Clear

| CASE REFERENCE | SCRIPT ID | NHS NUMBER | DATE OF BIRTH | SURNAME | FORENAME | PRESCRIPTION STATUS | CREATED | CREATED BY | LAST EDIT | LAST EDIT BY |
|---|---|---|---|---|---|---|---|---|---|---|
| 19152-0000104636 | D68037-0NVE01-03A53W | 965 784 8296 | 18/01/1995 | Ewarts | Faye | Acknowledged | 01/12/2023 14:26 | Ben Smythson | 01/12/2023 14:26 | Ben Smythson |
| 19152-0000104636 | A4D636-0NVE01-03A54I | 965 784 8296 | 18/01/1995 | Ewarts | Faye | Acknowledged | 01/12/2023 14:26 | Ben Smythson | 01/12/2023 14:26 | Ben Smythson |
| 19152-0000104636 | 732C34-0NVE01-03A55J | 965 784 8296 | 18/01/1995 | Ewarts | Faye | Acknowledged | 01/12/2023 14:26 | Ben Smythson | 01/12/2023 14:26 | Ben Smythson |
| 19152-0000104583 | | 965 784 8296 | 18/01/1995 | Ewarts | Faye | FP10 - Not Printed | 29/11/2023 13:49 | Sara Malavasi | 29/11/2023 13:49 | Sara Malavasi |
| 19152-0000104582 | CD5330-Y01086-039EC1 | 965 784 8296 | 18/01/1995 | Ewarts | Faye | Acknowledged | 28/11/2023 16:30 | Sara Malavasi | 28/11/2023 16:30 | Sara Malavasi |
| 19152-0000104576 | | 965 784 8296 | 18/01/1995 | Ewarts | Faye | FP10 - Not Printed | 28/11/2023 14:53 | Sara Malavasi | 28/11/2023 14:53 | Sara Malavasi |
| 19152-0000104572 | | 965 784 8296 | 18/01/1995 | Ewart | Faye | FP10 - Not Printed | 28/11/2023 13:01 | Sara Malavasi | 28/11/2023 13:01 | Sara Malavasi |
| 19152-0000104565 | | 965 784 8296 | 18/01/1995 | Ewart | Faye | FP10 - Not Printed | 28/11/2023 12:42 | Sara Malavasi | 28/11/2023 12:42 | Sara Malavasi |
| 19152-0000053815 | ECE0EB-0RF4QH-035D2H | 965 784 8296 | | EWART | Faye | Cancelled | 15/09/2023 11:38 | Sara Malavasi | 10/05/2023 17:15 | Sara Malavasi |
| 19152-0000094231 | 49E753-0RQX06-037F6X | 965 784 8296 | 18/01/1995 | EWART | Faye | Acknowledged | 14/08/2023 17:20 | A Dev | 14/08/2023 17:20 | A Dev |

- Acknowledged – EPS prescription has successfully been sent to the Spine.
- With Pharmacy – The sent EPS prescription has been pulled down from the Spine by a pharmacy
- Cancelled - The EPS prescription has successfully been cancelled
- CancelReject – The request to cancel the EPS prescription has failed. i.e., the EPS prescription is already with dispenser
- Sent – The request to send an EPS prescription has not been acknowledged by the Spine. Refer to Transmission Failure for failed EPS prescriptions
- Dispensed – EPS prescription has been dispensed by the pharmacy (this status will appear if a cancellation request was sent and patient already collected the prescription. The cancellation will not be possible in this case.)
- Signing Failed – The digital signing of the EPS prescription failed. Refer to Transmission Failure for failed EPS prescriptions
- FP10 Not printed – An FP10 prescription has been created but not printed
- FP10 Printed – An FP10 prescription has been created and printed
- FP10 Handwritten – An attempt to issue an EPS prescription has failed, the user has been forced to FP10 and has chosen to physically handwrite a prescription.

# 5.0. Creating a Prescription

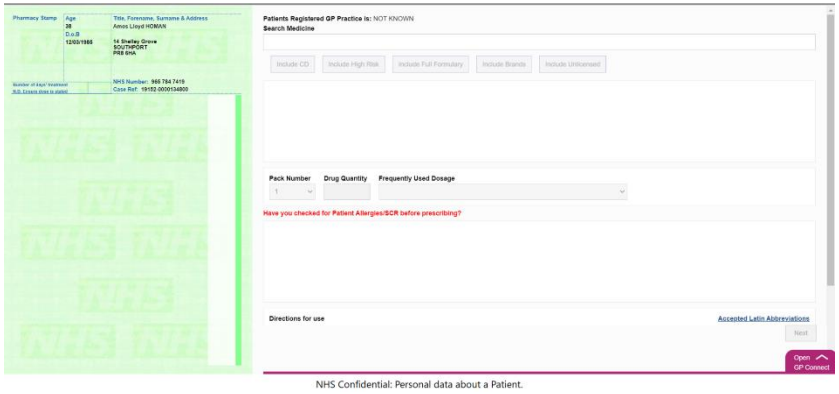
**Important Note:** CLEO SOLO EPS does not support:

- Post-Dated Prescriptions
- Prescribing to DAC's (Dispensing Appliance Contractors)
- Repeat Prescribing
- Prescribing of Specials
- Private Prescriptions
- Instalment dispensing (FP10MDA)

For further guidance on EPS for secondary care please follow the link - https://digital.nhs.uk/services/electronic-prescription-service/eps-for-secondary-care#exceptions
Or Electronic Prescription Service - NHS England Digital (For non-secondary care specific guidance)

To create a prescription, click the 'New Prescription' button.

This will launch the EPS module:




Before prescribing medications, users will be required to check if the patient has any allergies, current medications and status of any recently issued medications through :

- GP Connect (interface available on CLEO SOLO EPS)
- SCRa (Summary Care Record application) - https://portal.national.ncrs.nhs.uk/portal/ (NCRS)
- EPS Prescription Tracker
- Local Electronic Patient Record or PAS system

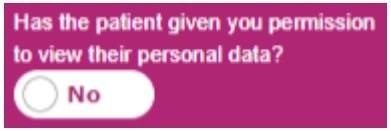
## 5.1. Prescribing Interface

### 5.1.1 GP Connect Interface

Should the prescriber require a view of the patient's historical care records, this can be viewed within the GP Connect tab at the bottom of the page. Selecting this tab will open the GP Connect interface.

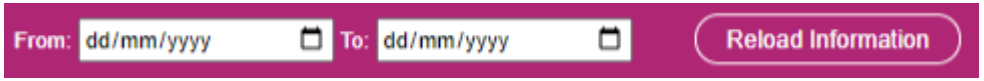
Prior to viewing the information in the GP Connect record, the prescriber must first gain the consent of the patient for them to do so. Once this has been obtained, the record can be accessed by selecting to confirm consent has been given.

**Important Note**: This action is audited.



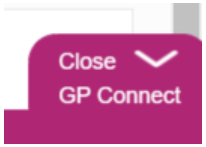

Once consent has been confirmed, this will then allow full access to the GP Connect interface. This can be navigated via the different section tabs:

Some sections allow for a timeframe to be input to search for records within a specific timeframe. Where available, prescribers can set a timeframe and then click the "Reload Information" button to refresh the data displayed.




The GP Connect interface can be resized to the prescriber's preference. Simply click and drag from the top of the GP Connect interface to extend the view.

In order to close the GP Connect Interface, click the “Close” button on the GP Connect tab. This will minimise the interface, however the interface can be expanded by clicking the tab again.




**Important Note:** Information returned within the interface will be in a “Read Only” format, meaning that the information can be reviewed but no changes can be made to the patient’s record within this interface.

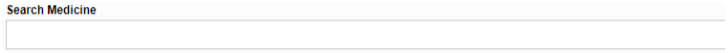
### 5.1.2. Patient’s Registered GP Practice

At the very top of the medication search area, the patient’s registered GP practice will be displayed:

**Important note:** For further information on GP connect access record, please visit: [GP Connect: Access Record - NHS England Digital]

### 5.1.3. Medication Search and Filters

To begin a search for medications, users must enter the name of the medication they wish to search for within the “Search Medicine” field.



This field requires a minimum of 4 characters to be entered, after which the search will automatically begin and return to the users any medications that meet the search criteria entered.

**Important Note:** For medications with a name consisting of less than 4 characters (e.g., E45), users enter the name followed by a space.

In addition to the search field, users have five search filters available:

The search defaults to the locally configured formulary (set up by Cleo Systems):

a. To search by Full Formulary, click on 'Include Full Formulary' and then click search
b. To search for Controlled Drugs, click on 'Include Full Formulary' and 'Include CD' and then click search
c. To search for High-Risk Drugs, click on 'Include Full Formulary' and 'Include High Risk' and then click search
d. To search for Branded Drugs, click on 'Include Full Formulary' and 'Include Brands' and then click search
e. To search for Unlicensed Drugs, click on 'Include Full Formulary' and 'Include Unlicensed' and then click search

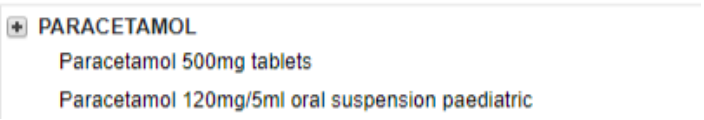
If a filter button is grey in colour, this indicates that the filter is currently inactive. If the filter is blue in colour, this indicates that the filter is currently active.

### 5.1.4. Medication Display

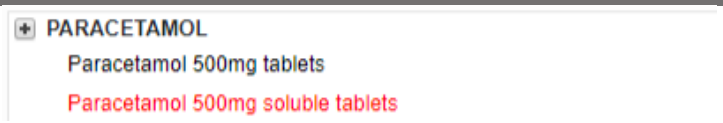
**Important Note:** If users select the "Include Brands" filter (i.e., searching for branded name) both AMP and VMP descriptions will be displayed. If the "Include Brands" filter has not been selected, the search will show the VMP description.

Prescribers should select the full formulary if the medication they need to prescribe is not available by default. By applying the full formulary filter, users will be able to prescribe all NHS Prescribable items included within dm+d.

**Medications that are available within the default formulary will appear black within the list of returned medications:**




**Medications that are outside of the default formulary will appear red (These will be present once the "Include Full Formulary" filter has been enabled)**




**Medications that are unlicensed will appear grey (These will be present once the Unlicensed filter has been enabled)**

### 5.1.5. Formulary and Restrictions

**Important Notes:**

If the Organisation has setup its own local formulary, users will have all medications returned within this formulary without the need to apply the "Include Full Formulary" filter.

Some prescribing roles will have different permissions and will be restricted to medications they are permitted to prescribe. Please see the below table for further details.

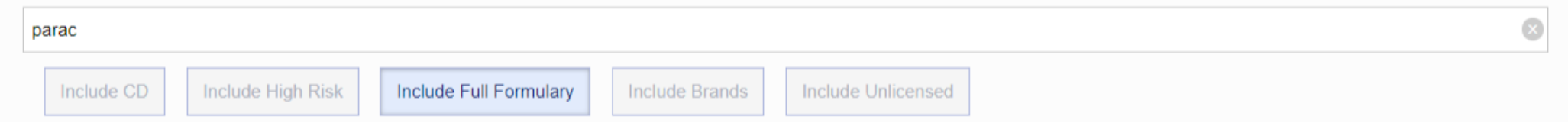
Prescribers should select the "Include Full Formulary" filter if the medication they need to prescribe is not available within the local formulary. By applying this filter, prescribers will be able to prescribe all NHS Prescribable items included within our database provided by First Data Bank.

| Prescriber Type Code | Prescriber Role | Formulary |
|---|---|---|
| **1001** | Outpatient Community Prescriber: Medical Prescriber | Full Access |
| **1004** | Outpatient Community Prescriber: Nurse Independent/Supplementary Prescriber | Full Access |
| **1008** | Outpatient Community Prescriber: Pharmacist independent/supplementary prescriber | Full Access |
| **1005** | Outpatient Community Prescriber: Community Practition /./r Nurse Prescriber | Restricted to medications flagged by First Databank as nurse Prescribable |

| | | |
|---|---|---|
| | | **(Only "Include Full Formulary" and "Include Brands" filters are available)** |

### 5.1.6. Clearing the Search

Should users wish to cancel a search and clear the search field and all currently enabled filters, they can do so with the "X" button that is displayed in the right-hand side of the search bar. Once selected, this will return the search to its default state, with the search field empty and no filters applied.




### 5.1.7. Unable to Find a Medication

If you are unable to find the medication the patient requires, you will need to:

- Check you have selected the appropriate filter, i.e., some medications are only Prescribable by brand, therefore you will need to ensure that the Include Brands option is selected before searching
- Check the BNF
- Check if they are present within dm+d: https://services.nhsbsa.nhs.uk/dmd-browser/search (only dm+d are available on EPS)

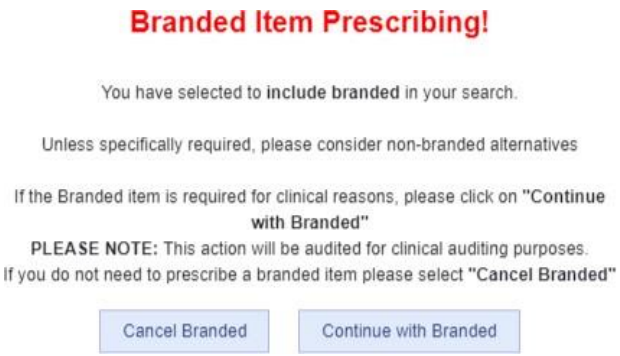
If you are still unable to find the required medication, please provide the detail of the medication you were searching for to CLEO who will log, monitor, and review these medications and feedback their findings and fall back to prescribing using the FP10.

**PLEASE NOTE**: First Data Bank provide data updates monthly. The updated data set will contain details of any medications that may have been discontinued, or may have had the name changed etc. CLEO will work with delivery organisations to ensure these changes are applied as soon as possible to ensure users don't prescribe the discontinued medication. It is the responsibility of the delivery organisation that they manage communications within their team to ensure that these medications are not prescribed until the next update is deployed into LIVE system.

### 5.1.8. Prescribing Branded Medications

Should users wish to include branded medications within their search results, they must apply the “Include Brands” filter.

**Important Note:** When prescribing by brand, the following warning box below will appear:



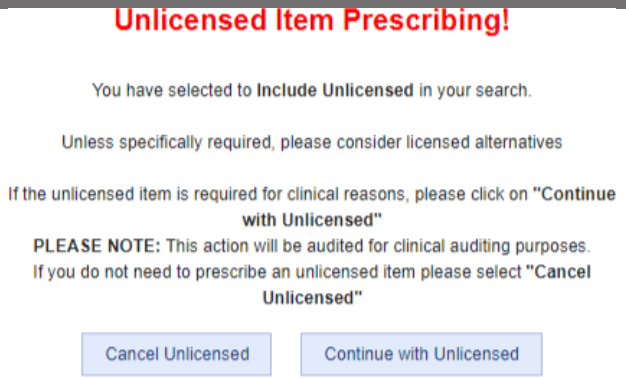

Click “Continue with Branded” to enable the “Include Brands” filter (This action can be reported against for clinical auditing purposes)

Click “Cancel Branded” to continue with the “Include Brands” filter disabled.

### 5.1.9. Prescribing Unlicensed Medications

Should users wish to include unlicensed medications within their search results, they must apply the “Include Unlicensed” filter.

**Important Note:** When prescribing by unlicensed, the following warning box below will appear:




Click “Continue with Unlicensed” to enable the “Include Unlicensed” filter (This action can be reported against for clinical auditing purposes)

Click “Cancel Unlicensed” to continue with the “Include Unlicensed” filter disabled.

### 5.1.10. Prescribing Controlled Drugs

Should users wish to include controlled drugs within their search results, they must apply the “Include CD” filter.

Any controlled drugs returned will feature the CD flag and schedule number on the item row.

**Important Note:** Users will only be able to prescribe controlled drugs within the S2–S5 range. The application does not permit prescribing of S1 items.

### 5.1.11. Prescribing High-Risk Medications

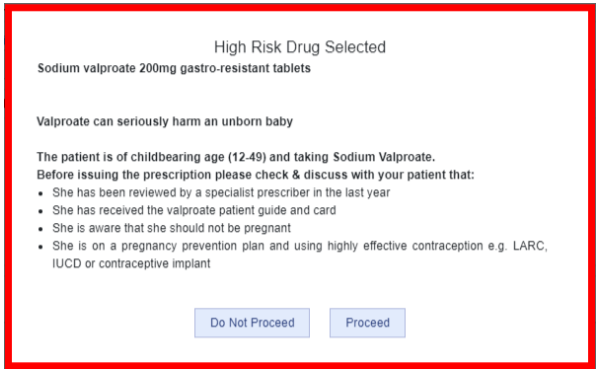
Should users wish to include high-risk medications within their search results, they must apply the “Include High Risk” filter.

If the user selects a high-risk medication from the search results, the following will be presented:

Click “Proceed” to continue prescribing the item.

Click “Do Not Proceed” to clear the medication search.

If users are attempting to prescribe Sodium Valproate for a female patient of child-bearing age, the following alert will display:




Click “Proceed” to continue prescribing the item.

Click “Do Not Proceed” to clear the medication search.

### 5.1.12. Prescriber Endorsement Requirements

The following table provides the prescriber endorsements required by the NHSBSA for various purposes.

Further information on the use of endorsements can be found here: [Endorsement guidance | NHSBSA]

| Source | Process/Endorsement Description | Endorsement Code |
|---|---|---|
| Prescriber | Prescriptions for products recommended by the Advisory Committee on Borderline Substances<br>In certain conditions some foods and toilet preparations have characteristics of drugs, and the Advisory Committee on Borderline Substances advises as to the circumstances in which such substances may be regarded as drugs. Prescriptions issued in accordance with the Committee's advice and endorsed "ACBS" will normally not be investigated. | ACBS |
| Prescriber | Contraceptive<br>A drug used for contraceptive purposes which is not listed in Part XVI Section 10 must be endorsed with the female symbol or equivalent (CC) by the prescriber in order not to attract a prescription charge. | CC |
| Prescriber | Selected List Scheme | SLS |

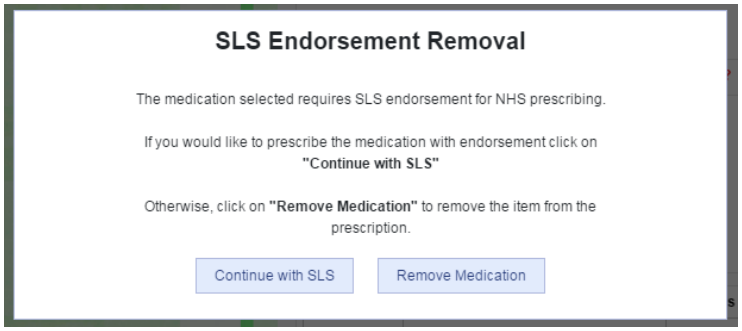
| | | |
|---|---|---|
| | Drugs and appliances to be prescribed in certain circumstances under the NHS Pharmaceutical Services. The prescriber must endorse the prescription with the reference "SLS". | |
| Prescriber | Assorted Flavour<br>Prescriptions for food replacement/food supplement products are often available in a variety of flavours.<br>“AF” may be used to request that an assortment of flavours be supplied when prescribing the “Flavour Not Specified” option of food replacement/supplement products. | AF |
| Prescriber | Free Supply<br>Prescriptions for sexual health treatment. This is to enable prescribers to endorse prescriptions for STIs to indicate to dispensers that the patient should not be charged | FS |

The prescriber can either prescribe the flavour not specified product by EPS or where the patient needs to have different flavours prescribe each flavour by EPS e.g., 3 chocolate, 3 banana, 3 vanilla.

- The ACBS endorsement will default to Selected – To remove the endorsement click on the ACBS box to remove the selection
- The AF endorsement defaults to Selected – To remove the endorsement click on the AF box
- The CC endorsement defaults to unselected – to add the endorsement click in the CC box

- The SLS endorsement will default to Selected.

You are unable to deselect this endorsement, if you click on SLS box you will be prompted to continue with the SLS or remove the medication from the prescription.




Click on “Continue with SLS” to prescribe the selected item.

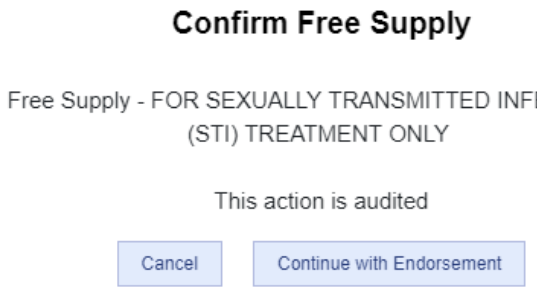
Click on “Remove Medication” to remove the item from the prescription.

**Free Supply**

To endorse a medication as FS, the user should search the medication item as normal.

On selecting the required medication, the Free Supply checkbox will be present above the “Directions for Use” field.

Users will receive the following prompt when ticking the Free Supply check box.




Click on “Continue with Endorsement” to prescribe the selected item with the endorsement applied.

Click on “Cancel” to remove the endorsement from the item.

**Important Note:** There is a requirement for FS medications to not be included on the same prescription as non-FS endorsed items. Therefore, if users choose to issue a prescription via FP10 rather than EPS and there are FS endorsed items and non-FS endorsed items, the FS items will be moved on to a separate prescription page when printing.

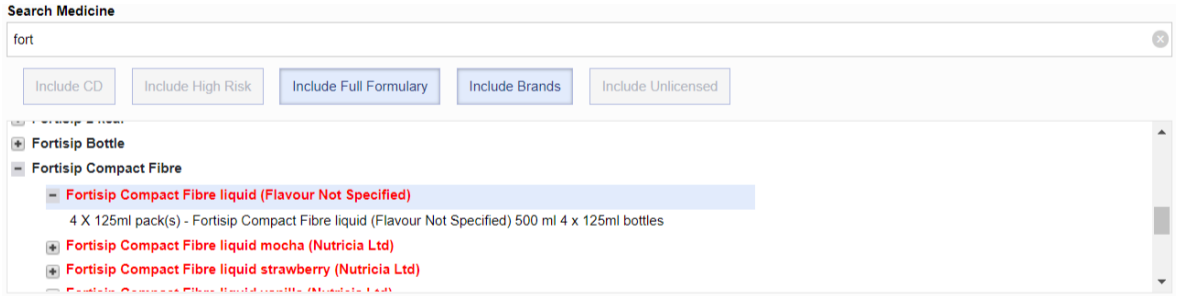
### 5.1.13. HRT (Hormone Replacement Therapy) Medications

HRT Medicines must be prescribed as a single item prescription and users will be required to split HRT drugs from any other drug that needs to be prescribed (e.g., sending the HRT item via EPS and issuing the rest of the items via FP10 or generate two different script IDs)

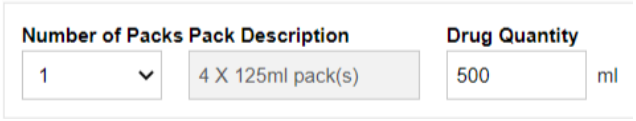
## 5.2. Adding Medications

### 5.2.1. Medication Pack Sizes

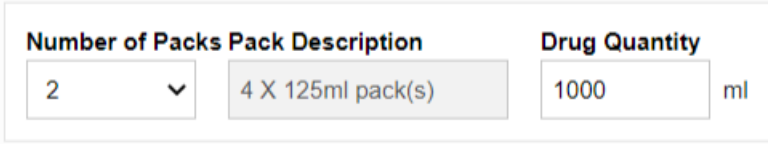
When the drug to be prescribed is identified and selected, users will note that they are presented with any available pack sizes and pack descriptor that are available for the medication.



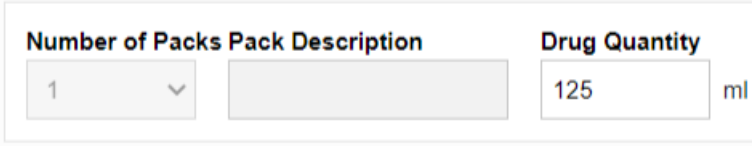
Selecting a pack descriptor will automatically populate the “Pack description” field with the one selected (this field cannot be amended). The “Drug Quantity” field will also automatically populate and calculate the total of the drug quantity contained in the medication selected (e.g., total of doses for one inhaler, total mls contained in a pack containing multiple bottles)




If a “Pack Descriptor” has been selected from the dropdown, this will enable the “Number of Packs” field. This menu will allow users to select how many packs they wish to prescribe. If this number is changed, this will automatically update the “Drug Quantity” field accordingly.



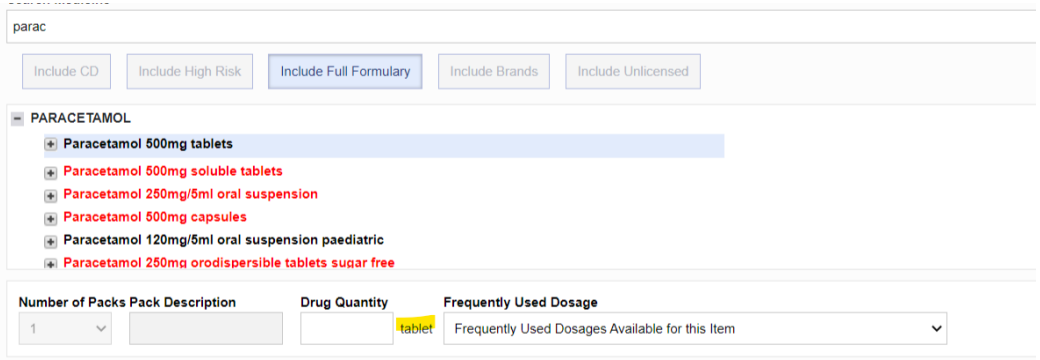

**Important Note**: The “Number of Packs” field will be disabled if users manually amend the “Drug Quantity” field after selecting a pack size. It is also not mandatory for users to select a pack descriptor; they can proceed by entering a manual quantity in the “Drug Quantity” field if the desired pack descriptor is not listed in the dropdown.



## 5.2.2. Drug Quantities

The quantity prescribed is made up of a numerical value and a unit of measure (the unit of measure is automatically transferred from the medication selected see image below), for example:

- 28 tablets
- 56 capsules
- 60 grams
- 10 vials
- 5 cartridges
- 5 pre-filled disposable injection
- 3 pessaries



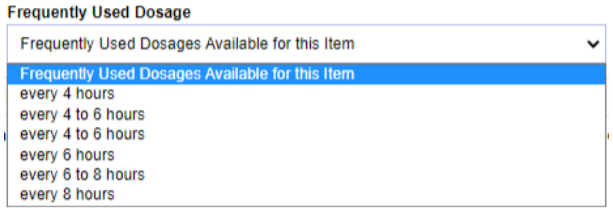
**Important Note:** The Drug Quantity field is mandatory and must be completed. If users enter “0” in the “Drug Quantity” field and subsequently click on the “Add Line” button, this will highlight the field in Red, alerting user to amend the quantity.

Similarly, if a users enter a number greater than 4 digits in length (i.e., 12345) this will also highlight the field in red to prompt the prescriber to review the quantity.

**Important Note:** Care MUST be taken to ensure the quantity relevant to the medication prescribed is entered to prevent any inaccuracies in dispensing.

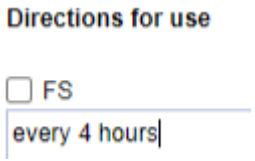
### 5.2.3. Frequently Used Dosages

Upon selecting a medication, if there are frequently used dosages available for the item these will be displayed within the “Frequently Used Dosage” menu.



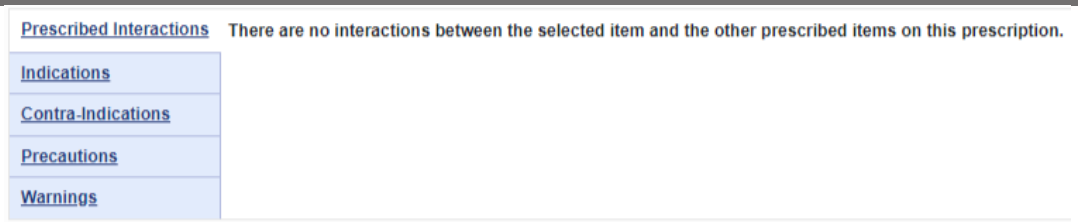

Selecting a dosage will automatically copy the text into the Directions for Use field. Users can select as many dosage instructions as they like, with each selection adding into the end of the Directions for Use field.

**Important Note**: Selecting a frequently used dosage is not mandatory and users can proceed without selecting. Users are also free to amend any dosage instructions copied into the Directions for Use field.




### 5.2.4. Medication Information Tabs

Upon selecting a medication, users will have access to several tabs of information pertaining to the medication selected. These are:




- Interactions – **Important Note**: Interactions between a medication selected, and any on the prescription in this session only.
- Indications
- Contra-Indications
- Precautions
- Warnings.

Click on the name of the tab where you would like to view the detail (this will always default to the Prescribed Interactions tab view).

### 5.2.5. Interaction Prompts

If users select a medication from the search that interacts with any of the medications that are currently on the prescription already, they will receive a prompt that will provide them with further detail around the interaction.

Select “Continue Prescribing” to continue with prescribing the item.

Select “Cancel Item” to cancel prescribing the item and clear the medication search.

The severity level of the interaction will be displayed in the left-hand side of the prompt. There are 4 levels of severity of interactions, with 4 being the highest. The application can be configured to set the minimum severity level of interaction that is displayed within the administration module. Please contact your Configuration Admin for confirmation on the severity level that has been set.

The classification of the severity alerts is:

Level 1: Risk is low. Combine having considered the risk to benefit ratio for the patient.

Level 2: Risk is moderate. Combine with caution having considered the risk to benefit ratio for the patient.
Reduce risk by one or more of the following: * Substitute or replace product, if appropriate.

Level 3:
Risk is significant. Combine in special circumstances only having considered the risk to benefit ratio for the patient.
Reduce risk by one or more of the following: * Substitute or replace product.

Level 4:
Risk is high and outweighs possible benefit. Do not combine.
Substitute or replace product.

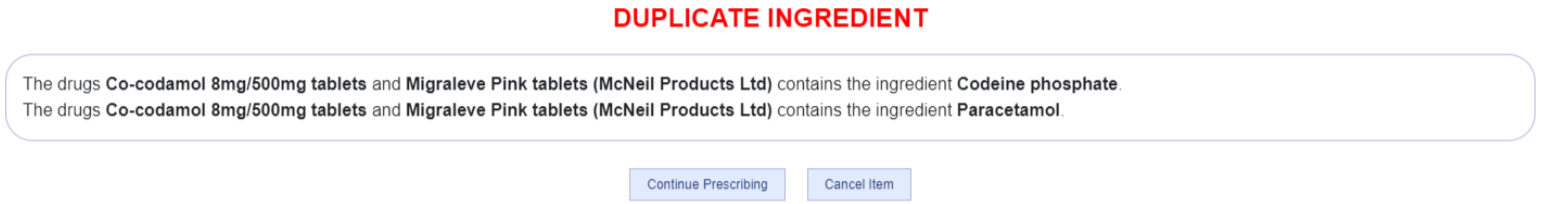
Regardless of the system configuration, level 4 interactions will always be displayed and will not permit the prescriber to add the item to the prescription.

In this scenario, users must select “Remove Item” to cancel the prescribing of the selected item and clear the medication search.

**Important notes**: Users should always refer to BNF and/or electronic records available if any query on drug interactions and duplicate drug/therapy.

### 5.2.6. Duplicate Ingredient Prompts

If users select a medication from the search that contains a duplicate ingredient to an item currently on the prescription, the following will display:




Select “Continue Prescribing” to continue with prescribing the item.

Select “Cancel Item” to cancel prescribing the item and clear the medication search.

**Important notes**: Users should always refer to BNF and/or electronic records available if any query on drug interactions and duplicate drug/therapy.

### 5.2.7. Duplicate Item Prompts

If users select a medication from the search that is already present on the current prescription (identical SNOMED codes), the following will display:

In this scenario, they must select “Cancel Item” to cancel prescribing the item and clear the medication search.

### 5.2.8. Drug Equivalent Prompts

If users select a medication from the search that is an equivalent of a medication that is already on the prescription, the following will display:

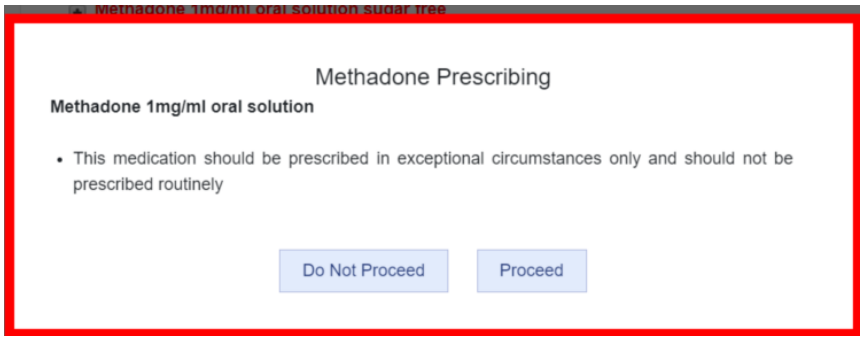
Select “Continue Prescribing” to continue with prescribing the item.

Select “Cancel Item” to cancel prescribing the item and clear the medication search.

**Important notes**: Users should always refer to BNF and/or electronic records available if any query on drug interactions and duplicate drug/therapy.

### 5.2.9 Methadone Prompt

If the prescriber selects any formulation of “Methadone” the following prompt will display:




If suitable, the “Proceed” button will permit the user to proceed with prescribing the item.

If unsuitable, the “Do Not Proceed” button will return the user to the medication search.

**Important Note:** This action is audited.

### 5.2.10. Items Prescribed within the Last 24 Hours

If the prescriber attempts to add an item to the prescription that has been prescribed for the patient within the last 24 hours within CLEO SOLO EPS, the following prompt will display:

Select “Continue Prescribing” to continue with prescribing the item.

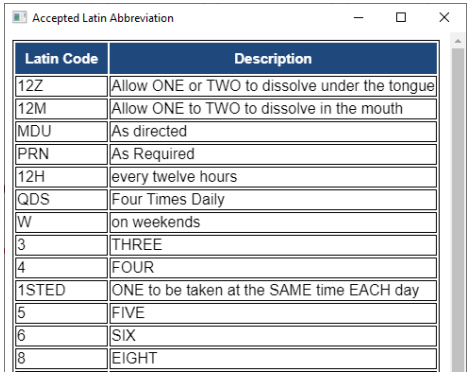
Select “Cancel Item” to cancel prescribing the item and clear the medication search.

### 5.2.11. Latin Abbreviation Short Codes

The CLEO SOLO EPS application permits users to enter Latin Abbreviation short codes within the “Directions for Use” field. These short codes will then automatically translate accordingly when the item is added to the prescription.

To view available Latin Abbreviations, the user can select the “Accepted Latin Abbreviations” link above the Directions for Use field.

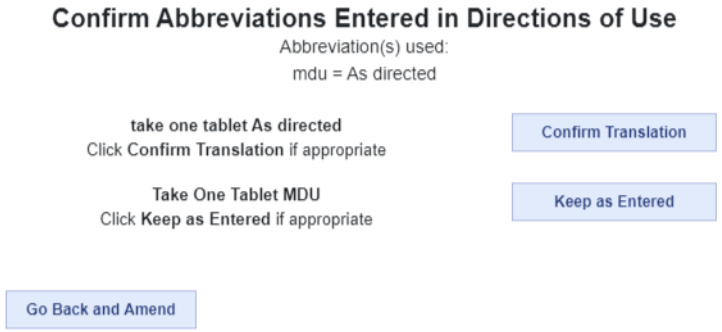
This will launch a separate window whereby the user can identify which codes are available for them to use. Users are free to move the window where they wish so that it can be referenced as they enter detail into the “Directions for Use” field.




| Latin Code | Description |
|---|---|
| 12Z | Allow ONE or TWO to dissolve under the tongue |
| 12M | Allow ONE to TWO to dissolve in the mouth |
| MDU | As directed |
| PRN | As Required |
| 12H | every twelve hours |
| QDS | Four Times Daily |
| W | on weekends |
| 3 | THREE |
| 4 | FOUR |
| 1STED | ONE to be taken at the SAME time EACH day |
| 5 | FIVE |
| 6 | SIX |
| 8 | EIGHT |

Each code within the “Latin Code” column corresponds with the text in the “Description” column. This means that in the above example, if users enter “MDU” into the “Directions for Use” field, this will translate to “As directed” when the item is added to the prescription.

If one or multiple codes have been entered and users select to add the item to the prescription, the following prompt will display:




Selecting “Confirm Translation” will add the item to the prescription and apply the translated text.

Selecting “Keep as Entered” will add the item to the prescription and keep the text as entered by users with no translation applied.

Selecting “Go Back and Amend” will return users to the medication search, where they can amend the data entered into the Directions for Use field.

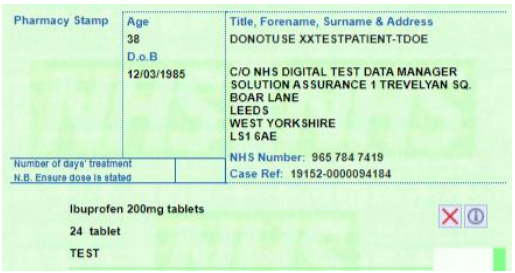
**Important Notes:**

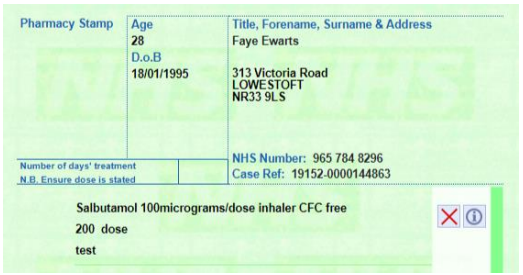
- Selection of Latin Abbreviations is not mandatory, and the prescriber can proceed and enter directions manually.
- When using Latin Abbreviations the prescriber must check, after clicking on the "Add line" button, that the abbreviation they entered has translated as expected to the prescription. If the translation is incorrect, please check the accepted Latin Abbreviation list above, remove the item from the list and re-add with the correct abbreviation.
- The text entered into the Directions for Use field may be printed and added to the patient's medications, please ensure you check the free text directions for use after entry to ensure all data is understandable, unambiguous and without any spelling errors.

### 5.2.12. Applying a Medication to the Prescription

Once all the mandatory data has been entered and users are ready to apply the medication to the prescription, the medication can be added with the "Add Line" button.

Once selected, this will transfer the medicine onto the prescription.

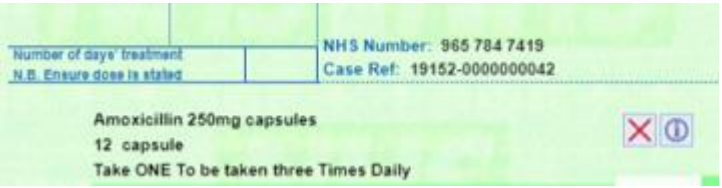



**PLEASE NOTE:** It is to be noted that the system does not have an additional information field to provide additional information to the dispensing pharmacy and cannot be automatically sent by the system.

## 5.2.13. Amending or Removing an Item

Once a drug has been prescribed and added, the item can only be amended or removed by clicking on the red X button on the right-hand side of the item.

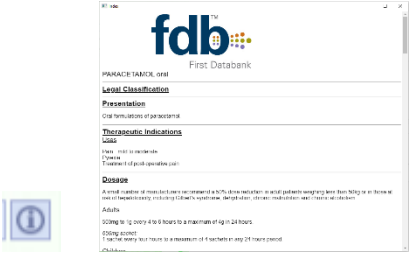



You will be prompted to confirm you would like to remove the item:

Select “Continue” to remove the item.

Select “Cancel” to keep the medication on the prescription.

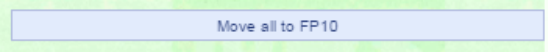
To view further information about a medication from First Data Bank, users can select the (i) button against the appropriate item on the prescription:



## 5.3. Split Prescriptions

If an item cannot for any reason be prescribed via EPS, the individual item will automatically be moved to the FP10 section of the prescription. However, if a patient chooses to have a printed FP10 rather than an EPS prescription and if your organisation's SOP supports the use of printed FP10s from SOLO, the item can be moved using the FP10 button beside the medication to be moved. See below:

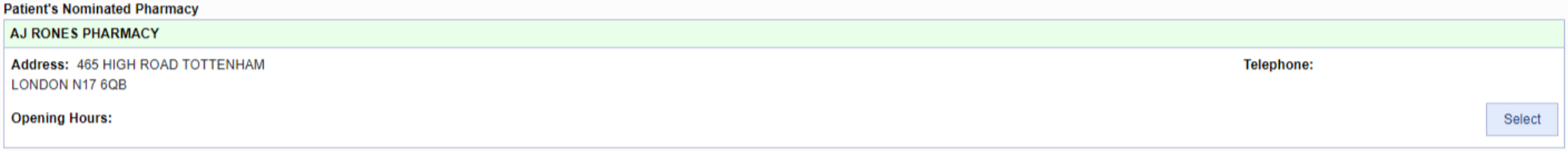
If all items need to be moved to FP10, click on 'Move all to FP10'



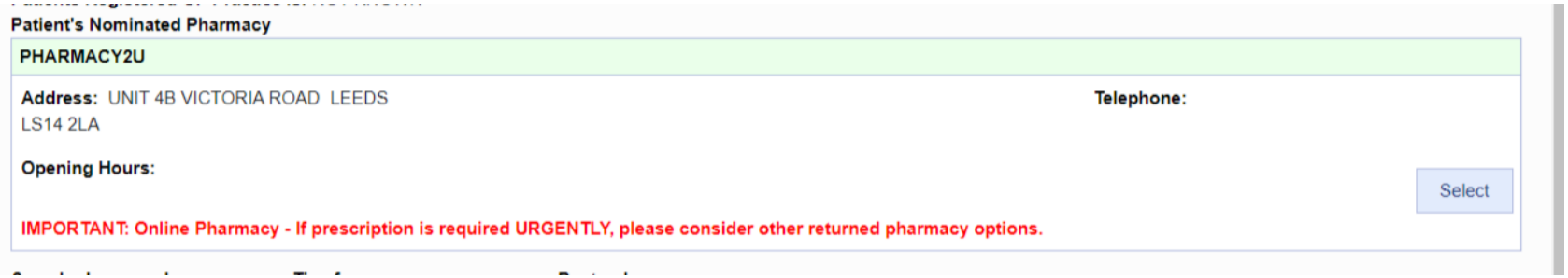

## 5.4. Choosing a Pharmacy

Once the prescription is ready to be sent, the "Next" button will proceed the prescriber to the Pharmacy Search.

If the patient has an existing nominated Pharmacy, this will be displayed at the very top of the view:



If the existing Nominated Pharmacy is a DSP (Distance Selling Pharmacy), users will be able to send the prescription to the DSP, but they will be alerted with the below message:




In addition to displaying the nominated pharmacy, an automatic Pharmacy Search will be conducted using a 6-hour timeframe and the patient's home postcode.

Users can search and select a pharmacy to send the electronic prescription to; this may be either the patient's nominated pharmacy or a one-off nomination for this prescription.

The Postcode is automatically transferred over from the patient's PDS record (home address); however, the postcode can be amended to meet the patient's needs. i.e., if the patient provides an alternative postcode as they are away from home, or the patient wishes to use a pharmacy in a different location.

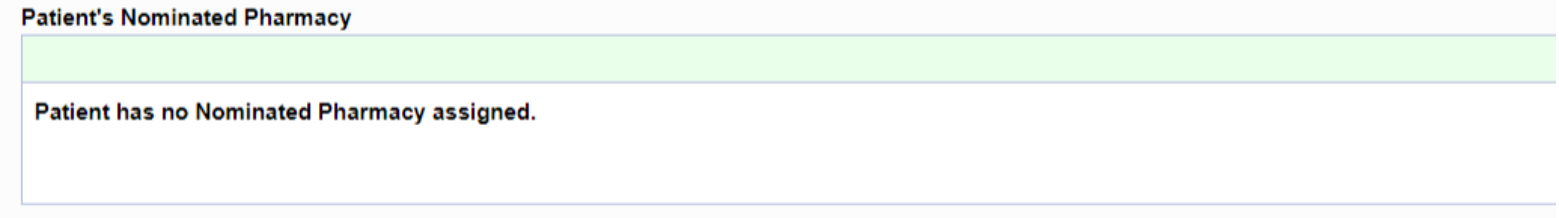
**IMPORTANT PLEASE NOTE:** You MUST enter a full and valid postcode to enable you to search. If the postcode entered is not full or valid you will be prompted to correct the postcode before continuing.

Pharmacy names are registered within the DoS (Directory of Services) and will need to be entered exactly how they are registered as, otherwise search by name will not show any result.

If prescribers cannot return the desired pharmacy with the automatic search, they can perform additional searches by either Timeframe and Postcode or Pharmacy name and Postcode. Searching by Pharmacy name will allow the patient to select a preferred pharmacy regardless of opening hours, whereas the Timeframe and Postcode search will display the nearest open pharmacies within the selected timeframe.
In this case too, the Nominated Pharmacy will still be displayed if available and the below list will reflect the updated parameters.

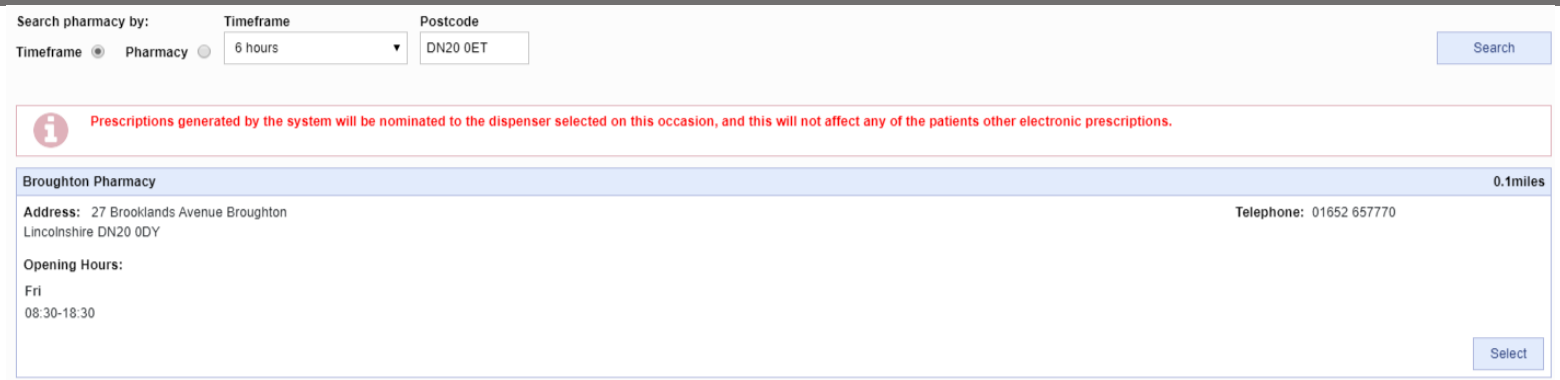
If patient has no Nominated Pharmacy, the following message will display.

**Important note:** DSPs will not be returned for either of the searches above.




**Important note:** Selecting a pharmacy as a one-off nomination in EPS Solo will not add or change a patient's existing nomination.

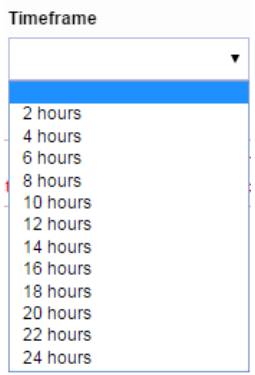
The search results will display contact details and opening times for the available pharmacies: these should be used to contact the pharmacy to check availability of stock for urgent medications in line with the patient's choice. This should be explained to the patient to ensure best outcomes and urgency of the drug that is being prescribed.



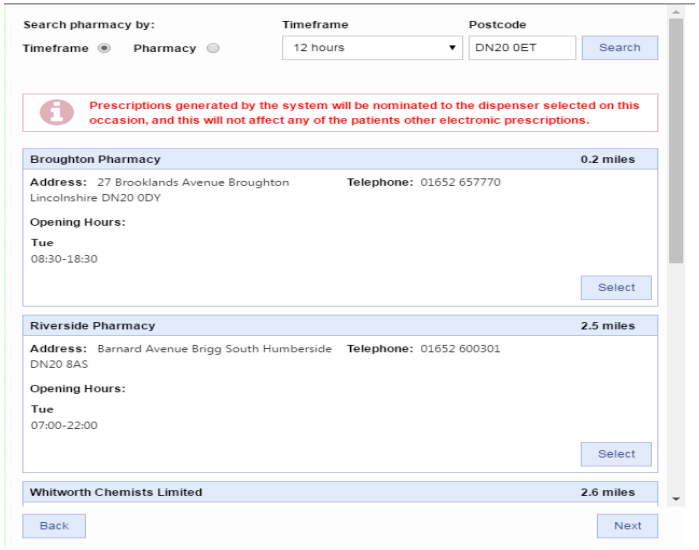

The system will default to Timeframe and Postcode, select the Pharmacy radio button to change the search criteria.

When searching by timeframe, users must first select a time from the dropdown, this time being the period within which the patient requires the medication.

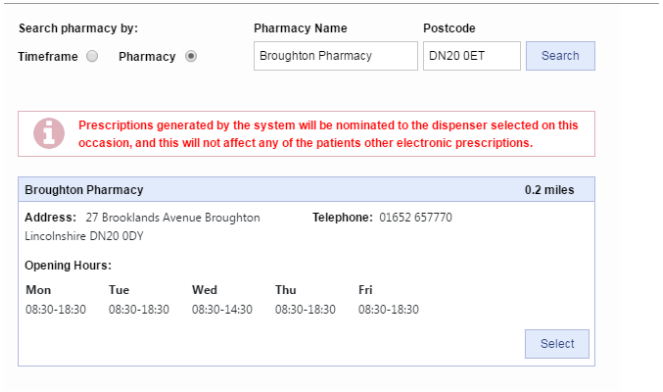
Select the appropriate timeframe from the list and click on search, the search will display all pharmacies that are open within the timeframe selected.




The search results will display as below, with the pharmacy nearest the postcode searched at the top of the list.

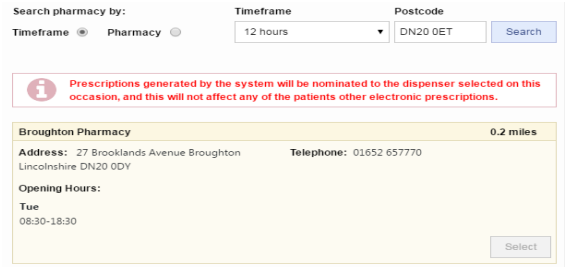



Pharmacy name search will allow a pharmacy to be chosen based on a name that the patient provides to the prescriber. Enter the pharmacy name and postcode and click on the search button. If a pharmacy is known as Broughton Pharmacy for example, the user will be able to search for “Broughton” within the search field.



**Important Note:** You will be required to check the opening times for the pharmacies and inform the patient if their preferred pharmacy is not currently open and advise on when that pharmacy will next be open.

Click the “Select” button on the pharmacy when you have confirmed the choice with the patient, on selection the pharmacy will highlight in yellow




Click the “Next” button on the bottom right of the page and the Urgent disclaimer will display.

**PLEASE NOTE:** This will only display if site or department configuration has enabled the Urgent Prescription prompt.

The “Confirm” button will proceed the user to the signing page.

The “Back” button will return the user to the Pharmacy Search.

Prescribers must read and confirm the actions have been completed before moving onto the next steps. The purpose of the pop-up dialogue below is to ensure that the prescription items(s) are being transmitted to a pharmacy:

- That is open for business despite confirmation from the Directory of Services (DoS)
- The prescriber has checked if necessary that the items are available, and:
- The patient or representative is aware there is a prescription available to collect from that pharmacy.

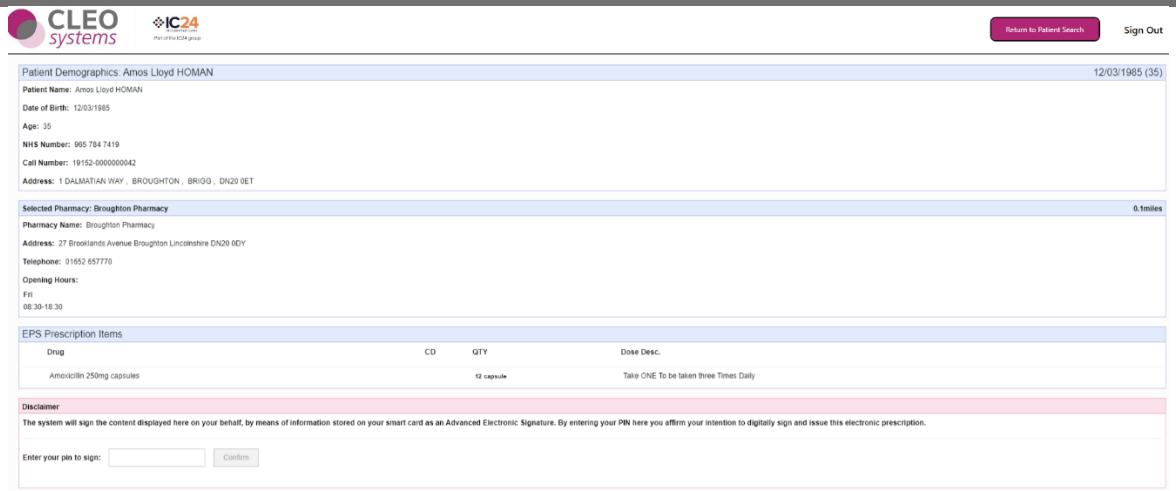
Prescribers have a duty to ensure that the chosen pharmacy is available to every patient regardless of age, disability, gender, race, sexual orientation, religion/ belief and vulnerable groups, and all attempts should be made to ensure openness and fairness towards all patients.

### 5.5. Signing and Transmitting an EPS prescription

An Electronic Prescription must be generated and signed electronically by the prescriber before it can be sent to the patient's pharmacy of choice via the NHS Spine. The dispenser must download the prescription from the NHS Spine.

After confirming with the pharmacy regarding stock, confirming the premises is operational and clicking Confirm to the Urgent Prescription disclaimer the screen below will appear. The screen provides a summary of the following.

- Demographics of the patient
- Pharmacy selected with opening time, address, and telephone number
- EPS prescription items
- Disclaimer highlighted in red is the area for signing
- The prescriber would be required to enter their smartcard PIN to authorise the prescription transmission.




Enter your smartcard PIN and click on Confirm

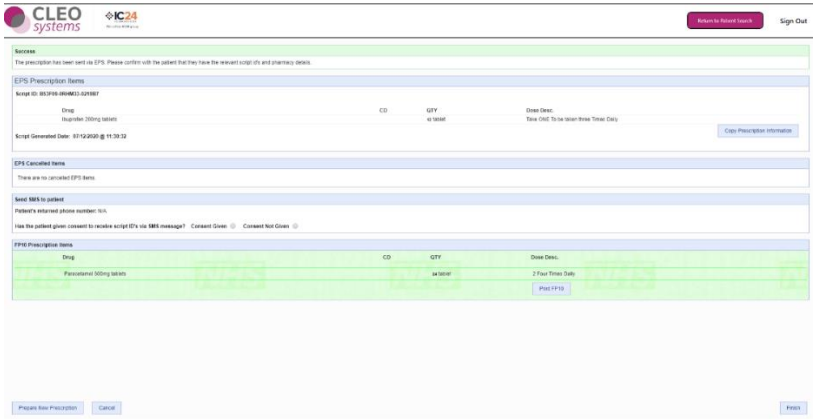
**IMPORTANT NOTE:** Before you can enter your PIN to sign you must have read all the information in the electronic prescription, you will be required to scroll down to view all medication items and then you are able to enter your PIN to sign.

**IMPORTANT NOTE:** If you enter your PIN incorrectly you will receive a prompt to advise of incorrect PIN entry, if you enter the PIN incorrectly 3 times you will lock your smartcard and the system will force you over to FP10. If you do lock your smartcard, please contact your local RA Agent to unlock your smartcard

**IMPORTANT NOTE:** For split prescriptions the FP10 items will not display until the EPS transmission is complete.

Upon entering the PIN, the user will be presented with the CIS2 Prompt. When this appears, this will automatically select the “smartcard” option for the user.

A confirmation screen will appear if the prescription has successfully been transmitted



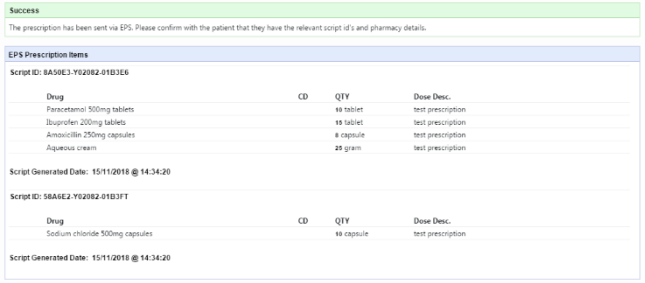

The confirmation screen will provide details of the unique EPS prescription ID for the prescription and the date and time it was sent.

Users can click the Copy Prescription Information button which will copy the EPS prescription ID/IDs for the case and medication/FP10 medication information to the local machine clipboard where the user can then paste the information in any other required systems as per local SOP requirements.

```
NHS Number: 9674960015
Patient Name: Otto Edward MCEVOY
Status: Acknowledged
EPS Script ID:   C2535A-0RM101-04914T

        21 capsule      Amoxicillin 250mg capsules
        every 8 hours
```

If more than 4 items have been prescribed via EPS, you will note that the prescription items have been broken down into separate prescription ID's, each 4 items prescribed will be represented with a unique prescription ID.

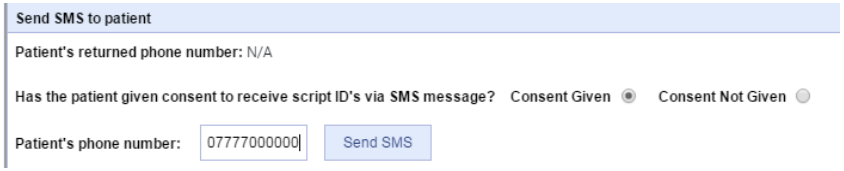


## 5.6. Sending SMS to patient (Subject to service availability)

If SMS functionality is enabled for your site, you will then be required to ask for the patient's consent to send the prescription ID directly to a mobile number of the patient's choice via SMS.

The prescription ID can be used by the pharmacy to locate the prescription.

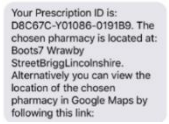
If someone is collecting the prescription on the patient's behalf, the patient representative's mobile number should be entered, if the patient is unsure of who the representative will be at this time, you can send the text to the patient, who will be able to forward the text as required



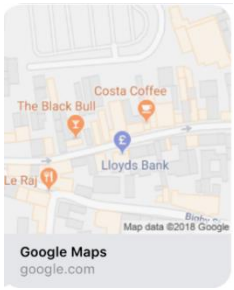

Click "Consent Given" to display the phone number field enter a mobile number and click on the Send SMS button to send the SMS.
Click "Consent Not Given" to continue without sending an SMS to the patient.

The SMS will contain the:

Script ID – Used to identify the prescription to the pharmacy – Script ID is NOT mandatory for a pharmacist to locate the prescription, but it may be useful and the address of the pharmacy and google map link pinpointing location of the pharmacy



Click on Tap to Load Preview to display a preview of the location of the pharmacy




Click on the grey Google Maps section to be directed to google.com for access to gaining directions to the pharmacy

## 5.7. Copy Prescription Information

Users can copy prescription information for a previously issued prescription. This will copy the prescription information for items within that prescription ID. When copying the prescription information, this will copy to the local machine clipboard:

Whether the prescription created was EPS or FP10, the prescription ID if available, patient's details, the medication name, dosage, quantity, directions for use and prescription status e.g.:

"NHS Number: 9657848296

Patient Name: Faye Ewarts

Status: Acknowledged

EPS Script ID: A4D636-0NVE01-03A54I

30 tablet Clobazam 10mg tablets

SLS Selected List Scheme

6 bottle Water for injections 500ml bottles”

If users wish to copy just the EPS prescription ID, for example to paste into the EPS tracker, they will be required to click Load Existing Prescription, then click and highlight the Script ID, press the CTRL button on the keyboard and the letter C to copy the ID to the clipboard. They will then be required to press the CTRL button and the letter V to paste the ID where it is required.

**IMPORTANT NOTE:** Users MUST check that the pasted ID is the one that they have requested to be copied to clipboard originally.

To copy the prescription information, firstly search the patient/script ID/case ID that requires copying.

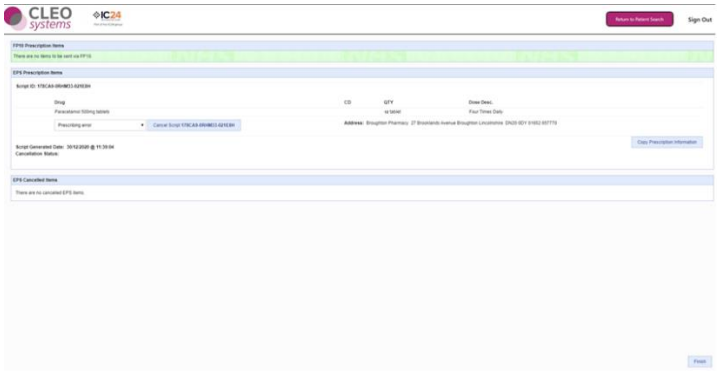
Highlight the row that requires copying and then click the “Copy Prescription Information” button. The information will then be copied to the local machine clipboard. The user can then paste this information where it is required, i.e., another clinical system.

### 5.8. Load Prescription Information

Users can view previously issued prescriptions that have been created within the local database.

Firstly, search the patient/script ID/case ID, highlight the row that requires viewing and click Load Existing Prescription.

Users will then be taken to the prescription information for all prescriptions that were issued. From this view, they will be able to cancel a prescription and copy prescription information (if a clinical user with appropriate smartcard rights). If no action is required, then the user can click Finish to be taken back to the patient search.



## 5.9. Transmission Failure

There may be instances when the transmission of an EPS prescription may not be successful. If the transmission is unsuccessful the system will automatically move all items to an FP10, which can then be printed locally. Users also can re-attempt the sending of the EPS prescription.
(See section 5.9.2 Retry Sending of Failed Scripts)

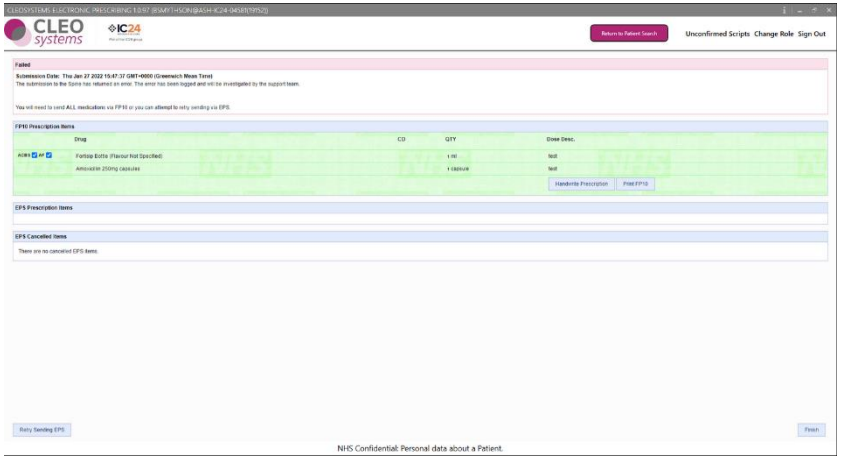
**PLEASE NOTE:** An EPS transmission may be unsuccessful for several reasons:

- If the NHS Spine is experiencing technical problems
- CLEO SOLO EPS is experiencing a connectivity or technical issue

In the event of a technical failure, you will receive a prompt to advise that the EPS transmission was unsuccessful, and all items prescribed for EPS will automatically be transferred to FP10 for printing.

The prescriber may not be aware whether a prescription has been successfully sent to the Spine or not.

Click on "Continue" and you will be directed to the final screen: the top section will highlight in red and advise you of the EPS Failure (see below) – all medications will have automatically been moved to FP10, which can be printed. This may not always mean the EPS prescription did not transmit but a delay in the message handling may have caused it to time out before a confirmation has been received. Please check the EPS Tracker for prescription status.

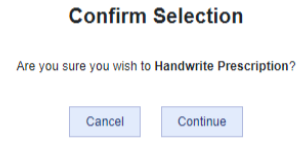



Prescribers must be aware that there could be a clinical risk to the patient as there could be two valid prescriptions for the same patient. This prescription will be automatically cancelled by the system in the back end via the auto-cancellation process however the user will not see this. Users will be required to check the EPS Tracker for the status of the prescription to confirm the cancellation has been successful.

### 5.9.1. Handwriting/Printing the FP10 (organisation/site dependent)

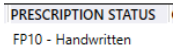
If you have prepared an FP10 (split prescription) OR received an EPS Failure message where all items prescribed were automatically transferred to FP10 and you click Finish before you have printed the FP10 prescription you will receive a prompt to remind you to print. Users can then select either to return to the prescription or to proceed without printing.

If users are going to physically handwrite a prescription, then they should select the Handwrite Prescription button. They will then receive the following prompt where they should click Continue:




The Handwrite Prescription and Print FP10 buttons will then be disabled, and users can continue to proceed by clicking Finish.

When searching for the patient again, the prescription status will be updated to say FP10 – Handwritten:




If users are going to print the FP10 they should click the Print FP10 button. The prescription print preview will display, click on Print in the preview and the printer options will display. Click on OK to confirm and print. The Print FP10 button will update to Re-Print FP10. Once printed, the Prepare New Prescription button will be available. This button will allow them to begin a new prescribing session for the same patient.

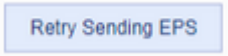
Click “Finish” if the prescribing for the patient is complete. When searching for the patient again, the prescription status will be updated to say FP10 – Printed:

In the event of users clicking Print Later and finishing the prescribing instance, when searching for the patient again, the prescription status will be updated to say FP10 – Not Printed:

### 5.9.2. Retry Sending of Failed Scripts

**Please Note:** If users have already proceeded to print/handwrite the FP10, this option will no longer be available. They must enter a new prescribing session to send another EPS prescription for the patient.

If users wish to proceed and retry the sending of the EPS prescription, this process can be initiated by selecting the Retry Sending EPS button:




They will then be returned to the Medication Search where all medications that had failed to send via EPS will be retained on the prescription. Users are then free to immediately proceed to the Pharmacy Search via the Next button, or to add/remove any further medications before proceeding.

The Pharmacy that was previously selected will remain selected, so unless the user requires to change this, the Next button can be selected to proceed to sign and send the prescription again.

If the prescription fails to send again, users can follow this process again to re-attempt the sending. Once the prescription has been successfully sent, the Retry button will no longer be available and will instead be replaced with the Prepare New Prescription button.

Following any error, users will be required to log off CLEO SOLO EPS and remove their smartcard from the smartcard reader. They will then need to re-enter their smartcard, select the appropriate smartcard role, open CLEO SOLO EPS and log back on to the application with the smartcard. If this has not resolved the issue and the user continues to receive failures, then they will need to contact the Service Desk (or the agreed organisation escalation process)

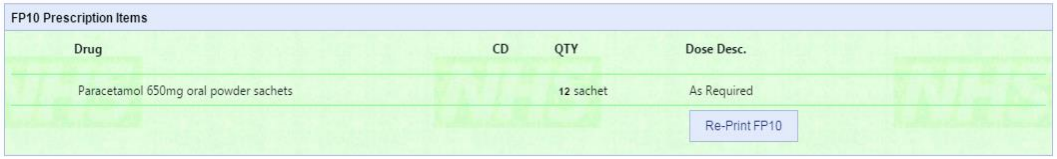
## 5.10. Printing FP10 prescriptions (organisation/site dependent)

**PLEASE NOTE:** For FP10 printing, sites will need to have printers configured (the site's local IT support will set this up) and have appropriate FP10SS stationery.

If you click Finish before any FP10 items have been printed, you will receive the following prompt:

- Click on Print Now to be re-directed back to the previous page and then click on the Print FP10 option within the green FP10 section.
- Click on Print Later to close the prescribing module. To print later, you will be required to carry out a patient search and select the relevant prescription within the view and select the Load Existing Prescription button

When an FP10 prescription has been printed, the Print FP10 button will be automatically replaced with a Re-Print FP10 option. If you are required to re-print a prescription – "re-print "will automatically display on the printed prescription.




### 5.10.1. Editing an FP10 Prescription

If users have created an FP10 prescription only (i.e., have not attempted to send any medications via EPS in the session), before printing the prescription they will have the ability to edit the FP10. They can proceed with this via the Edit FP10 button:

Upon selecting this button, users will be returned to the medication search where they can proceed to add/remove any items from the prescription. They will then proceed to the pharmacy search, whereby they can opt to attempt to send the items via EPS or move the items to the FP10 prescription. If any item(s)

have been selected to be sent via EPS, they must then proceed to select a Pharmacy and proceed to sign and send the prescription. If users opt to move all items to FP10, they will then proceed to the final stage of the session, whereby the FP10 prescription can then be printed.

**Please Note:** The Edit FP10 button will only be available up until the point that users prints the FP10. Once the FP10 has been printed, the edit button will no longer be available. This button will also not be present if users have sent any items via EPS within the session.

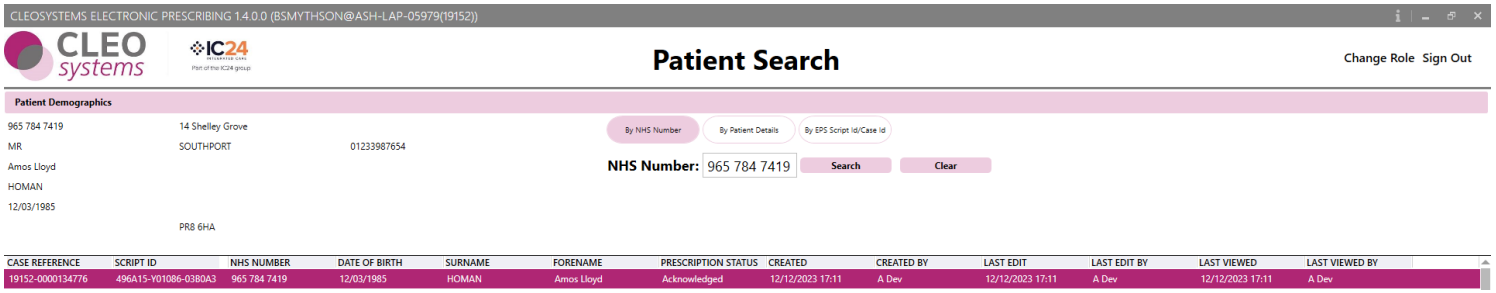
## 6.0 Cancelling an EPS Prescription

Any authorised individual with appropriate smartcard rights, within the organisation where the prescription was created, can authorise the cancellation of an electronic prescription. Prescribers will automatically have the authority to cancel prescriptions issued by themselves or other prescribers.

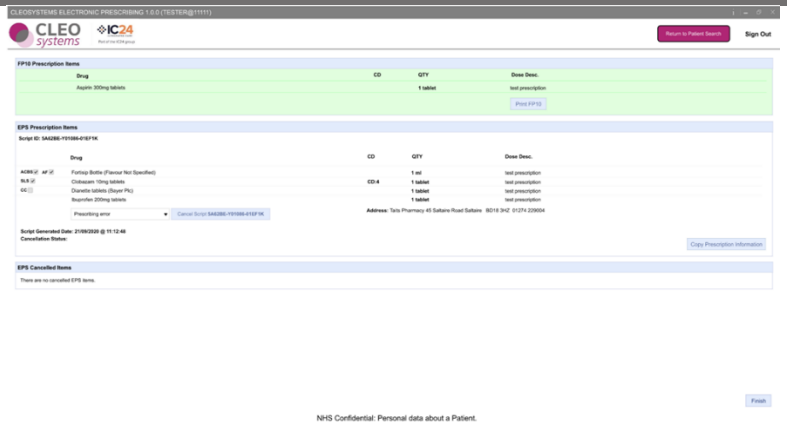
A prescription can be cancelled either:

- After an EPS prescription has been sent
- When a transmission fails to complete - automatic cancellation

When prescribers need to cancel a prescription, they should carry out a patient search as detailed within the Patient Search section of this document:

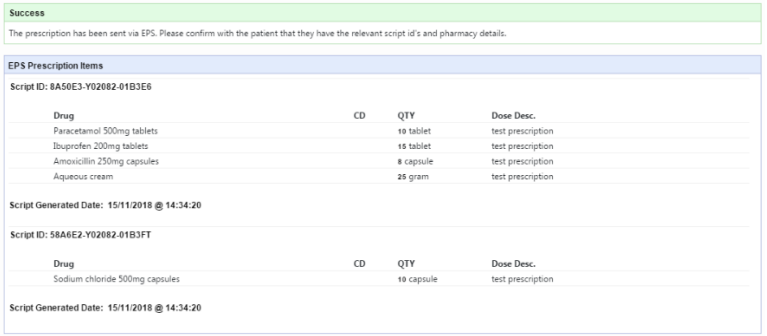



Users should select the row and click Load Existing Prescription




If more than 4 items have been prescribed via EPS, you will note that the prescription items have been broken down into separate prescription ID's, each 4 items prescribed will be represented with a unique prescription ID per prescribing session.

**Important Note:** Prescribers are not permitted to cancel individual items, all items relating to an individual prescription ID will need to be cancelled and re-prescribed as appropriate:



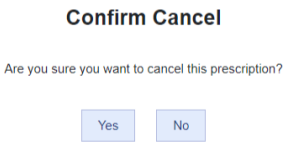

Once you have identified the prescription ID that requires cancelling (if you need to cancel multiple prescription IDs, you will be required to cancel one prescription ID at a time), you will be required to select the appropriate reason for cancelling from the drop down (the drop-down defaults to Prescribing Error):

- Prescribing Error – Select this option if a prescribing error has been identified

- At the Pharmacists Request – Select this option if you are contacted by a pharmacist to cancel a prescription ID(s)
- Clinical Contra-indication – Select this option if a clinical contra-indication has been identified
- Change to medication treatment regime – Select this option if a change to the medication treatment has been identified
- Clinical Grounds – Select this option if you need to cancel on clinical grounds
- At the patient's request – Select this option if you are cancelling at the request of the patient

Then click on the Cancel Script: ....ID....  button for the prescription ID you need to cancel:

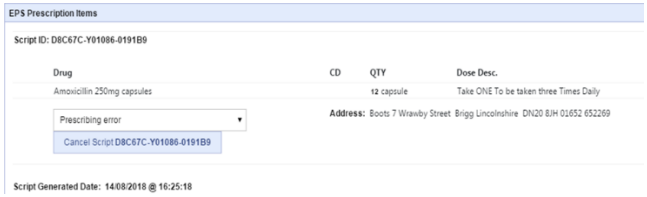
Once users click to cancel, a prompt will display requiring to confirm the action.




Selecting "Yes" will initiate the cancellation.

Selecting "No" will cancel the action.

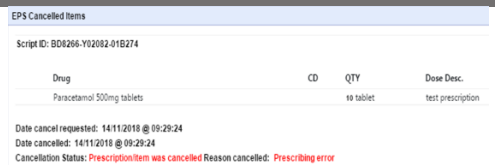
The address shown is the address of the pharmacy to which the EPS prescription was sent.




If multiple Prescription IDs are being cancelled, the prescriber can choose to give a different cancellation reason for each prescription ID they need to cancel.

## 6.1. Successful Cancellation

If the cancellation has been successful, you will receive the confirmation as below, highlighting in red text that the prescription has been cancelled, your selected reason for cancellation and the date and time of the cancellation request and the date and time of the successful cancellation:

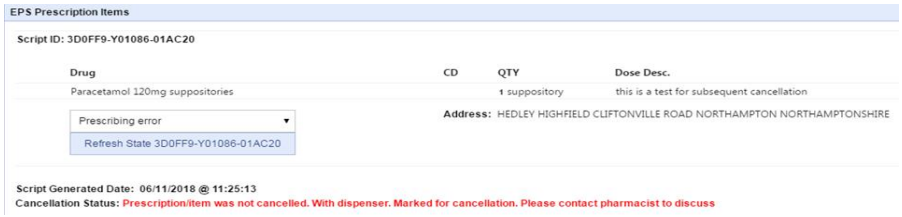



## 6.2. Unsuccessful Cancellation

### 6.2.1. Prescription is With Dispenser

If you receive the following prompt advising that the prescription is With Dispenser. Marked for Cancellation, again highlighted in red text, you will be required to contact the pharmacy, provide them with the prescription ID and request they return the prescription ID to the Spine.

The contact number for the pharmacy which currently has the prescription will be displayed in the address field on this view.

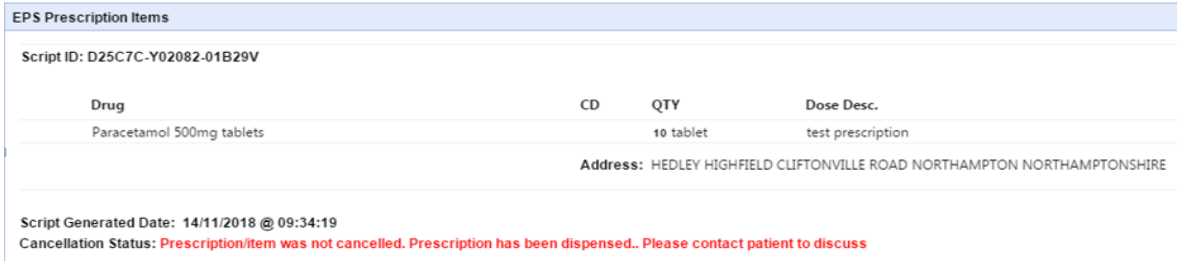



If the pharmacy can and have confirmed they have returned the prescription to the Spine, click on the Refresh State: ....ID.... button, if the cancellation response has been received the view will update and the cancellation status will display as prescription/item was cancelled and the cancellation reason you selected.

### 6.2.2. Prescription has been Dispensed:

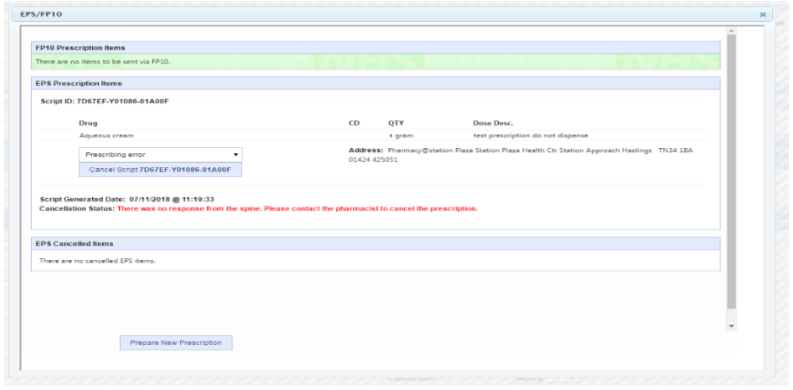
If you receive the following prompt advising that the prescription has been dispensed, you will be required to contact the patient to discuss any concerns with the medications prescribed and agree next steps.

**Please Note:** If a prescription has been marked as dispensed, the user will not have access to refresh the state of the prescription within the application. The status will continue to appear as “CancelReject” or “CancelRequested”.



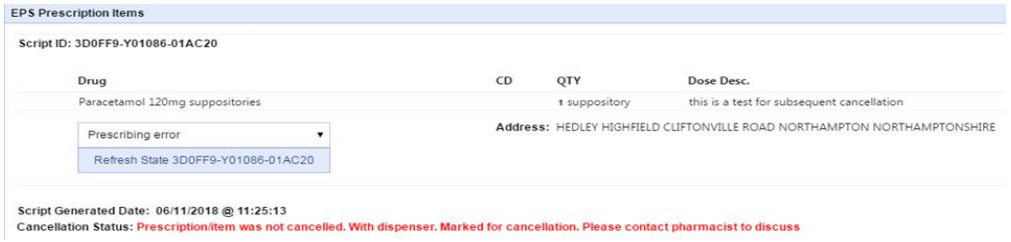

### 6.2.3. No response to cancellation request:

If you receive the following prompt to advise that there has been no response from the Spine, you should assume that the prescription has not been cancelled and will be required to contact the pharmacy and confirm the status of the prescription on the dispensing system and agree next steps. Use the EPS Tracker to search for the location and status of the prescription.



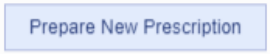
Any issues that require further investigation, such as the tracker saying the status of the prescription is cancelled, but CLEO SOLO EPS not updating the status when refreshing or searching the patient again should be logged via the Service Desk(or the agreed organisation escalation process)

In the case of a cancellation request, whereby pharmacy has confirmed that they have sent the prescription ID back to the Spine following downloading it, end users can click on the Refresh button, and this will update the status to Cancelled.

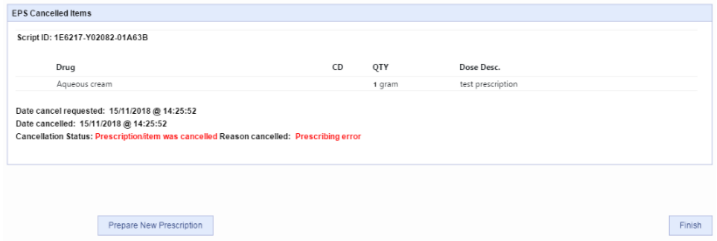



## 6.3. Preparing a new EPS prescription after cancellation

If you need to prepare a new EPS prescription; Click on the Prepare New Prescription button and follow the steps in the “Creating a prescription” section of this guide.



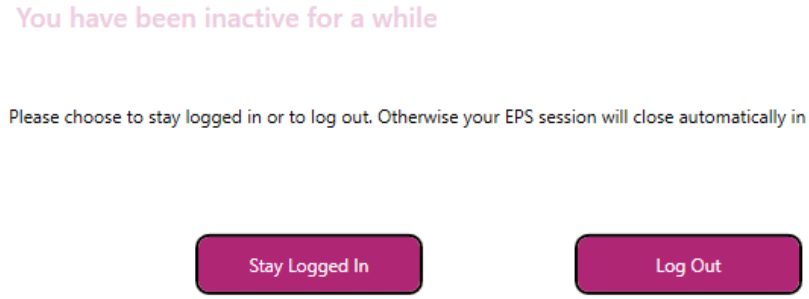

**Please Note:** that this button is only available when remaining in the same session after sending an EPS prescription. This button is not available when loading an existing prescription.




Prescribers should never assume that a prescription has been cancelled unless a positive cancellation response has been received from the system. Users should check the EPS tracker to confirm the cancellation – See the EPS prescription tracker section of this document for further details on the use of the EPS tracker.

## 7.0. Inactivity Time-Out

If users have been inactive within the application for a certain period of time (timeframe will be configured by your local administrator), they will receive a prompt to confirm if they wish to remain logged into the application. If the user does not take any action following the appearance of the prompt, the application will then be automatically closed once the timer has expired.




Click “Stay Logged In” to remain logged into the application.

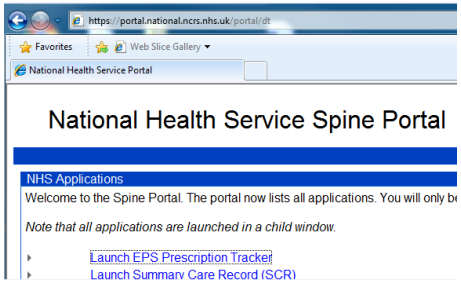
Click “Log Out” to logout of the application.

## 8.0. EPS Prescription Tracker

The EPS prescription tracker can be accessed to support the prescriber when assessing the patient, the EPS tracker will provide information on any active EPS prescriptions for the patient/prescription ID and the status of any active prescriptions.

The prescription tracker can be accessed via the following URL: https://portal.national.ncrs.nhs.uk/portal/dt (or shortcut provided by your organisation).

Please Note: Users MUST have their smartcard authenticated to access the EPS prescription tracker.



## 9.0. Signing Out

When users have completed their prescribing and wish to close the application, they must first select the “Sign Out” button in the top right-hand corner of the application.

Upon selecting, they will be prompted to confirm the action of signing out.

Selecting “Yes” will log users out of the application.

Selecting “No” will allow users to remain logged into the application.

## 10.0. Service Desk

On contact with the service desk they will require details relating to the application version, username and if possible screenshots showing any queries being raised.
Please see the form below that you will receive when raising a ticket on the service desk:

## Minimum Dataset (MDS) Detail Form

**(Please remember to raise only one issue per Helpdesk ticket)**

| | |
|---|---|
| Customer Reference | |
| Name of User | |
| Contact details of user (email address and tel/ mobile number) | |
| Date Reported by end user | |
| Date Helpdesk issue Raised | |
| **Version/Environment/Patch** | |
| Product Name | |
| Version # / Patch # | |
| Date the environment was last patched? | |
| Environment problem occurring in? | |
| **Connection type** | |
| Is it home, office, wifi, network. | |
| **Other related information** (circumstances which led to error, i.e. patched environment etc) Is there a workaround in place and does it affect one or more user | |
| | |
| **Other Technical Details** (please include any page stats, custom scripts, vb or other technical information if applicable) | |
| | |



| | |
|---|---|
| **Issue** | |
| Actual Behaviour | |
| Expected Behaviour | |
| Investigations undertaken | |
| Function Being Performed | |
| **Replication Details** (Please provide Screenshots of the whole Workflow ensuring you capture the whole screen. Please also ensure that no patient specific data is included, in accordance with Data Protection, even when taken from a non-live environment) | |
| Username | |
| Security Group | |
| Login Location | |
| Component Name | |
| Report Name (if applicable) Please include how the report is triggered | |
| EXAMPLE record i.e. Script ID, NHS number, or something unique we can test/validate with (if applicable) – please do not share sensitive information | |

*Please identify below exact steps taken i.e. detailed screenshots from logon including the whole workflow and a description of what is expected where something is missing or wrong. Instead of screenshots video is allowed only if text description of the problem is included.*

Place Screenshots and full description here: