SOLO EPS Implementation Playbook

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Document Reviewers

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Susan Spriggs		Head of Systems Development	20.03.2024	V2.0
Karen Ventura		Product Director	20.03.2024	V2.0

Document Approval

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Karen Ventura	K Ventura	Product Director	20.03.2024	V2.0

Glossary of Terms

Acronym	Definition
EPS	Electronic Prescription Service
BSA	Business Services Authority

Contents

1.0. Introduction to the electronic prescription service (EPS)

EPS allows prescribers to send prescriptions electronically to a community pharmacy of the patient’s choice. This makes the prescribing and dispensing process more efficient and convenient for patients and staff. EPS can be used to replace outpatient prescribing performed on FP10 (handwritten or printed) prescriptions, dispensed by a community pharmacy.

There are currently several exclusions that are out of scope of EPS:

- Instalment prescribing/dispensing
- Homecare prescribing
- Electronic repeat dispensing (eRD)* & regular repeat templates
- Items not mapped to the dictionary of medicines and devices (dm+d)
- Community pharmacies outside England. (99.7% of Pharmacies in England are compliant)
- Dispensing Appliance Contractors (DAC)
- Internal Hospital Pharmacy Dispensing

2.0. Introduction to CLEO SOLO EPS

Developed as a Covid-19 response to enable instant e-prescribing capability. CLEO SOLO EPS enables clinicians to prescribe right away (now also supports RiO system integration and EPS can be launched from within RiO) and includes seamless spine integration and works alongside an existing clinical or pharmacy system.

CLEO Systems will be responsible for setting up the organisation profile and sites associated with the organisation. The customer/end users will be responsible for:

- Maintaining/updating the config for the sites
- Adding/maintaining/updating departments associated with a site
- Creating/maintaining/amending/disabling user accounts
- Implementation of processes for scenarios outside of the applications capabilities

3.0. EPS Go Live Communication

Prior to beginning use of the EPS service, it is important to consider how your patients will be notified of your use of this service.

Not only patients, but other departments within the organisation will need to be made aware of this intention as they may need to refine their processes. This can include (but not limited to): Reporting (BI) teams, Clinical Leads...

4.0. NHS Smartcards

4.1. Prescribing Users

To prescribe via EPS, all prescribers must have an NHS Smartcard, and this must contain the relevant RBAC roles and activities that permit electronic prescribing. To prescribe, the user must have one of the following currently supported roles:

R8000: Clinical Practitioner Access Role

Within the SOLO EPS application, this maps to the following prescriber type code: 1001 – Outpatient Community Prescriber – Medical Prescriber

R8001: Nurse Access Role

Within the SOLO EPS application, this maps to the following prescriber type code: 1004 – Outpatient Community Prescriber – Nurse Independent/Supplementary Prescriber and 1005 - Outpatient Community Prescriber – Community Nurse Practitioner Prescriber

R8003: Health Professional Access Role

Within the SOLO EPS application, this maps to the following prescriber type code: 1008 – Outpatient Community Prescriber – Pharmacist Independent/Supplementary Prescriber

Within any of the above roles, a prescribing user must have all four of the following smartcard activities:

- **B0278** - Perform Prescription Preparation
- **B0401** - View Patient Medication
- **B0420** - Independent Prescribing

- **B0468** - Cancel Prescription

If any of the above activities are missing, the prescriber will not be permitted to prescribe via EPS.

4.2. Administration Users

While it is not a mandatory requirement for administration users to login to the application, if admin users will be performing cancellations of EPS prescriptions, there is a requirement to login with a smartcard for this purpose.

To perform a script cancellation, the user must have the following RBAC role:

R8008: Admin/Clinical Support Access Role

Within the above role, the user must also have the following smartcard activities:

- **B0468** - Cancel Prescription
- **B0401** - View Patient Medication

If the above activity is missing from the user's smartcard, the user will not be permitted to cancel EPS prescriptions.

PLEASE NOTE: To conduct UAT, Cleo Systems will provide an INT (UAT) environment and users will be able to log in using staging smart cards only, which will need to be requested to their local RA agent.

4.3. EPS Tracker

To access the EPS Tracker Functionality, users must ensure that they have the following smartcard activity within one of their smartcard roles:

- **B0278** - Perform Prescription Preparation

If the user does not have the above activity on their smartcard, they will not be permitted to access the NHS Digital EPS Tracker tool. Please see the EPS Prescription Tracker for further details.

4.4. Smartcard Management

If any of the above roles/activities are not present for the relevant users on their smartcard, this will need to be configured by your local RA agent. They will facilitate the management of the smartcard to ensure that these are applied. Once applied, the user will be permitted to access the CLEO SOLO EPS application once their user profile has been configured.

IMPORTANT NOTE: Users that have 2 identical roles present in their smartcard will not be able to log in

4.5. Smartcard Linking

To allow access to the application via smartcard, the user's smartcard ID must be linked to their CLEO SOLO EPS user profile. Please refer to section How do I Setup a User Profile for a detailed guide on how to setup a user profile.

IMPORTANT NOTE: The application does not support the use of deprecated roles nor they can be accredited.

5.0. Determining cost centre codes

An important factor to consider before configuring the CLEO SOLO EPS application is the cost centre codes that need to be applied to prescriptions. This is important as this will allow for the correct attribution of prescribing costs by the Trust and the NHS Business Services Authority (BSA).

The first step is to identify which codes are currently used on paper FP10 prescription pads.

5.1. Code association

It is important to identify how the cost centre codes are associated with the various prescribers or sites/departments within the organisation. This is important as when sites and departments are setup within the organisation and prescribers are assigned to these accordingly, it will be the cost codes set within these sites and departments that are present on the prescription.

When a prescriber accesses the system, they are presented with a menu to select which site or department they are prescribing from for that session. The selection made here will then apply the cost centre code associated with that site/department to any prescriptions that they generate.

It will also need to be considered what process will be followed for locums or junior doctors, as these users will need to be setup with a user profile and assigned to an appropriate site/department, and this will determine the cost code that is applied to the prescriptions that they generate.

The How Do I Setup a Site and How do I Setup a Department sections within this guide, demonstrate how cost codes can be implemented to sites and departments within the system configuration.

6.0. Reporting Requirements

It is important to consider reporting requirements prior to configuring and accessing the application. The CLEO SOLO EPS application provides in-depth reporting capabilities via either bespoke reports, or a data feed that can be examined by your internal BI teams. The reporting capabilities cover all actions within the application and includes (but is not limited to): prescribed medications, non-formulary prescribing, high-cost items, prescription accuracy…

When considering the above, it is also important to consider what data may be required by other departments within the organisation (finance department, clinical leads etc.) as this will factor into the decision of how the reporting data is to be gathered and presented.

7.0. Formulary Management

An important area to consider is how the formulary will be managed within the CLEO SOLO EPS application. The application supports the inclusion of your own formulary via a csv file that can be uploaded as part of the implementation process.

This will determine the baseline medications that can be searched for and selected by the prescriber. The .csv file will consist of a single column populated with the SNOMED codes' list of the drugs that will be part of your local formulary.

7.1. Medications Unsupported within EPS

When considering your formulary, it is very important to note that ONLY medications that are available within dm+d can be prescribed via EPS. To check if your medications are present within dm + d, please follow the below link. This will take you to the dm+d browser where you can search for

medications to ensure they exist. If the items exist within dm+d as a VMP, they can be prescribed via EPS.
https://applications.nhsbsa.nhs.uk/DMDBrowser/DMDBrowser.do

If medications that you regularly prescribe are not present within dm+d, it is important that a process is defined for how these will be prescribed for patients as the application will not support the prescribing of these items. For further information, please see here: Electronic Prescription Service (EPS) dm+d and prescribing systems information for prescribers - NHS Digital

Some prescriber roles won't have the rights to prescribe certain drug types and endorsements via EPS (e.g., Community Nurse Practitioner Prescriber).

7.2. Controlled Drugs

The SOLO EPS application fully supports the prescribing of controlled drugs within schedule 2-5. The prescribing of Schedule 1 items is not permitted. The application will display the quantity of controlled drugs on the prescription in both numerical and word forms (for Schedule 2 and 3). Prescription of opioids addiction treatment is not allowed for certain user roles (pharmacist independent prescribers and nurses independent prescribers). For further detail, please see here: Controlled drugs and drug dependence | Medicines guidance | BNF | NICE

7.3. High-Risk medications

The SOLO EPS application supports the prescribing of high-risk medications, such as Methotrexate. When such a medication has been selected, a prompt will be presented to the prescriber requesting them to confirm they wish to proceed with prescribing the item

7.4. Unlicensed Medications

The SOLO EPS application supports the prescribing of unlicensed medications. The medication search has a selectable filter whereby a prescriber can opt to include unlicensed medications within the medication search results, and subsequently can then apply these medications to the EPS prescription if they are mapped within dm+d.

7.5. Branded Medications

The SOLO EPS application supports the prescribing of branded medications. The medication search has a selectable filter whereby a prescriber can opt to include branded medications within the medication search results, and subsequently can then apply these medications to the EPS prescription.

7.6. Prescriber Endorsements and HRT Medications

The CLEO SOLO EPS application supports the application of prescriber endorsements required by the NHS BSA.

Please see the endorsements supported within the application below, however further information can be found here: https://digital.nhs.uk/services/electronic-prescription-service

Process/Endorsement Description	Endorsement Code
Prescriptions for products recommended by the Advisory Committee on Borderline Substances 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**
Contraceptive 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**
Selected List Scheme Drugs and appliances to be prescribed in certain circumstances under the NHS Pharmaceutical Services. The prescriber must endorse the prescription with the reference "SLS".	**SLS**
Assorted Flavour Prescriptions for food replacement/food supplement products are often available in a variety of flavours. “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**
Free Supply 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**

HRT (Hormone Replacement Therapy) Medications covered by the HRT PPC 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 vice versa or generate two separate prescriptions IDs).

7.7. Latin Abbreviations

Within the SOLO EPS application, prescribers can input a range of Latin Abbreviations to support in the recording of the directions of use for medications. The application offers a “Directions for Use” field which will accept the following abbreviations:

Important Note: The translation will occur when the item is added to the prescription. It is important for prescribers to familiarize themselves with the below list and review all medications added to the prescription to ensure that the directions have been applied as intended, however users will have the possibility to amend this before adding the item.

The application is now supporting a fully configurable Latin abbreviation list, whereby users can choose if keeping SOLO EPS default list or amend/substitute with one in line with their local policies/guidelines. This can be set up across the whole Organisation or also configured it for each specific Site and related Departments.

Latin Code	Description	Latin Code	Description
12Z	Allow ONE or TWO to dissolve under the tongue	12DEL	Put ONE or TWO drops into the LEFT ear
12M	Allow ONE to TWO to dissolve in the mouth	12DIL	Put ONE or TWO drops into the LEFT eye
MDU	As directed	12DN	Put ONE or TWO drops into the nostril
PRN	As Required	12DER	Put ONE or TWO drops into the RIGHT ear
12H	every twelve hours	12DIR	Put ONE or TWO drops into the RIGHT eye
QDS	Four Times Daily	1	Take ONE
12P	Inhale ONE or TWO puffs	11H	Take ONE and a HALF
12PF	Inhale ONE or TWO puffs at first	13	Take ONE to THREE

OD	Once Daily	12	Take ONE or TWO
12R	Place ONE or TWO high into the rectum	12S	Take ONE or TWO 5ml spoonful's
12RF	Place ONE or TWO high into the rectum at first	12SF	Take ONE or TWO 5ml spoonsful at first
12V	Place ONE or TWO high into the vagina	12F	Take ONE or TWO at first
12VF	Place ONE or TWO high into the vagina at first	TDS	To be taken three Times Daily
13DEA	Put ONE to THREE drops into the AFFECTED ear	BD	Twice Daily
13DE	Put ONE to THREE drops into the ear	USD	Used as directed
13DI	Put ONE to THREE drops into the eye	ASD	Take as directed
13DEL	Put ONE to THREE drops into the LEFT ear	AC	Before food
13DER	Put ONE to THREE drops into the RIGHT ear	OM	Every morning
12DIB	Put ONE or TWO drops into each eye	PC	After food
12DEA	Put ONE or TWO drops into the AFFECTED ear	QQH	Every four hours
12DIA	Put ONE or TWO drops into the AFFECTED eye	STAT	Immediately
12DE	Put ONE or TWO drops into the ear	TID	Three times daily
12DI	Put ONE or TWO drops into the eye		

8.0. Repeat Prescribing/Post Dated prescribing

As part of the implementation process, it is important to consider whether you frequently post-date prescriptions or conduct repeat prescribing.

The CLEO SOLO EPS application does not currently support either Post-Dated Prescribing or Repeat Prescribing. The application will support the ability for a prescriber to review what medications were previously prescribed within the application for the patient, but the user will need to launch into a new prescribing session for the patient and search for and apply the required medications and then send via EPS.

It is important to consider the above and determine if a process will need to be implemented to support this scenario.

9.0. Pharmacy Nomination

Prior to prescribing within the application, it is important to consider pharmacy nomination.

The CLEO SOLO EPS application will allow the prescriber to search for and select a one-off nomination for a patient. The application supports the search of patient's Nominated Pharmacy and if available, it will be selectable any time the patient needs a new prescription, however system will not automatically default to the Nominated Pharmacy, but only display it if available.

10.0. Managing Prescriptions requests

It is important to consider how prescribers will be aware of what patients will need a prescription generated.

The CLEO SOLO EPS application does not at present support the prescriber in determining which patients require a prescription. The prescriber must perform the patient search and then generate the prescription once the patient has been matched against the spine.

Consideration will need to be given to the process put into practice to ensure that prescribers are aware of what patients require a prescription. They will then be supported in generating these prescriptions within the CLEO SOLO EPS application.

It would also be worth evaluating whether a process will need implementing for prescribers to provide confirmation of scripts generated. This could also be supported by the reporting available within the CLEO SOLO EPS application.

11.0. Patients Prescriptions Notifications

Prior to prescribing within the application, it is important to consider how a patient will be notified of their prescription being sent to a pharmacy.

The CLEO SOLO EPS application features functionality whereby after the successful sending of a prescription, an SMS message can be sent to the mobile telephone number of the patients choosing. This SMS message contains the Script ID of the prescription, along with the pharmacy whereby the prescription has been sent (including a Google Maps link for directions). This functionality will only be available if this was covered within your contract.

If the SMS functionality is not contractually covered, it is important to consider the implementation of a process to inform patients of their prescriptions.

If there are processes in place whereby third parties are informed of a prescription being available, this scenario will also need to be considered and a process implemented to handle this.

12.0. Copying of Prescription Information

Whilst the solution could support integration with your primary clinical system, it is important to consider how the details of any prescriptions generated within CLEO SOLO EPS can be included within your current patient management system.

The application features functionality whereby all the details of a prescription are copied to the clipboard for pasting into your current system. This manual process will support in the transfer of the notes between the two systems. It should then be identified where best to insert this data into your current system.

Alternatively, the application has a wide range of reporting functionality and the details of the prescribing sessions for patients can be captured via reports.

13.0. Processing Urgent Prescriptions

It is important to give consideration into the processing of urgent prescriptions and how this is to be handled.

The CLEO SOLO EPS application features a prompt to the prescriber for urgent prescribing which will prompt the prescriber to consider that they are sending the prescription to an open pharmacy of the patient's choice and ensuring that they have informed the patient how and where to collect their medication. This is prompted to the user before they reach the script signing stage.

Whether this prompt displays can be determined within the configuration for each site or department.

14.0. Relaying Information to the Pharmacy

It is important to consider what processes are currently in place to provide additional information to the Pharmacy.

The CLEO SOLO EPS application will allow the prescriber to include any necessary notes for the patient/pharmacy within the "Directions for Use" field when prescribing. It is important to note that whatever is entered into this field will be sent to the pharmacy and will be printed onto the medication sticker that will be applied to the medication.

Additionally, when a prescriber is searching for a Pharmacy to send the EPS prescription, they will be presented with the telephone number of every Pharmacy displayed. This will support the prescriber if they wish to contact the pharmacy to provide any additional details.

15.0. Review Prior to Prescribing

It is important to consider if there are any current processes in place whereby a prescription will be generated by an administrative user and then reviewed and signed by the prescribing Clinician.

This process is not supported within the CLEO SOLO EPS application as administrative users are not permitted to generate prescriptions. The prescribing Clinician must follow the complete prescribing process: Searching for the patient, applying the medications to the prescription, and signing and sending the script.

If it is a requirement for an administrative user to prepare a prescription, a process will need to be considered for implementation that will support the capabilities offered within the application.

16.0. Prescription Cancellation

The CLEO SOLO EPS application supports the ability for users to cancel sent EPS prescriptions. It is firstly important to consider who will be cancelling prescriptions. This action can be completed by both Clinical and Non-Clinical users within the application. Providing their smartcard has been setup correctly, all Clinical users will be permitted to cancel EPS prescriptions.

If administration users are to be permitted to cancel EPS prescriptions, it must be ensured that their smartcard is updated with the appropriate role and activity. They must also be assigned the “Cancellation Admin” CLEO SOLO EPS role within their user profile. Please refer to section “How do I Setup a User”.

Please refer to the NHS Smartcards section in this document for all required details.

16.1. Unsuccessful cancellations

There can be scenarios whereby the cancellation of a script has been unsuccessful. The CLEO SOLO EPS application will inform the user if the cancellation is unsuccessful, along with the reason why the cancellation has failed. These scenarios are as follows:

16.2. Pharmacy has pulled down the prescription

If the pharmacy has already downloaded the prescription from the spine, the user will be informed that the cancellation was unsuccessful for this reason. At this stage, the user will be prompted to contact the Pharmacy to discuss the cancellation. It is therefore important to determine who will be responsible for this action in this scenario and an appropriate process put into place.

16.3. Medication has already been dispensed

If the Pharmacy has already dispensed the prescription to the patient, the user will be informed that the cancellation was unsuccessful for this reason. At this stage, the user will be prompted to contact the patient to discuss the cancellation. It is important to determine who will be responsible for this action in this scenario, with an appropriate process put into place.

16.4. Scripts returned to the Spine

If a cancellation is requested by the user but is unsuccessful due to the Pharmacy having downloaded the prescription, if the pharmacy is contacted and they have returned the prescription to the spine, the CLEO SOLO EPS application will then trigger the cancellation of the script automatically. It is important to note that the application will only have visibility of prescription statuses that are initiated by the user and does not display real-time prescription statuses that have occurred outside of the application. Please see EPS Prescription Tracker section for details on accessing real-time prescription states.

In this scenario, once the script has been returned to the spine, the user can enter the EPS script again and refresh the status. This will update the status within the application to its cancelled state. It is important to consider who will be responsible for conducting this manual process and ensure a process for this scenario has been defined.

16.5. Informing the patient

When a script has been cancelled, it is important to consider how the patient will be notified of the cancellation. The CLEO SOLO EPS application does not support this notification and therefore a process should be considered to support this process.

16.6. Additional Contact with the pharmacy

If any additional contact is required with the Pharmacy, the CLEO SOLO EPS application will display the Pharmacy contact details when returned from the pharmacy search within the prescribing flow.

17.0. EPS Tracker

The EPS Prescription Tracker allows users to track an EPS prescription and identify the whereabouts of the digital prescription. This tool can be used to confirm receipt of prescriptions or to determine if a prescription has been collected by the patient. It is possible to track a prescription using either the unique prescription ID, or a search by the patient's NHS Number or demographics.

It is important to consider who will be accessing this tool and ensuring that the users have the correct permissions to access this tool. The user must have an NHS Smartcard to access the EPS Tracker. Given that all prescribing users will need a smartcard with valid permissions to access the CLEO SOLO EPS application, all prescribing users will be permitted to access this tool. It is administrative users that will need to be given further consideration as these users must have been issued with an NHS Smartcard and the appropriate smartcard activity. Please see NHS Smartcards section for further detail.

To access the tool, the user must first login with their NHS Smartcard and then navigate to the following: https://portal.national.ncrs.nhs.uk/portal/

18.0. Business Continuity

18.1. EPS System Failure

In the event of a full solution failure and the EPS system being unavailable, the designated continuity plan should be enforced, with users reverting to paper FP10 prescribing pads until the issue has been resolved. Alongside this action:

If issues are beginning to occur, users can check the NHS England Service Management page to confirm if any issues with NHS England services have been reported: https://digital.nhs.uk/services/spine

If there are no reported issues when searching via the above page but Spine issues persist, this should be raised with CLEO Systems for further investigation. In addition to this, if there is an issue with the CLEO SOLO EPS application itself, this should be raised to the CLEO Systems service desk via the following link: www.ic24serviceportal.topdesk.net

18.2. Prescription not arrived at the pharmacy

If the patient's prescription has been reported as not having arrived at the pharmacy, it should be considered what process will be implemented to support this scenario.

The EPS Prescription tracker can be used to determine the current location of the patient's prescription. Please see EPS Prescription Tracker page for further details on this tool.

Additionally, it is important to note that some pharmacies download their prescriptions at a set time each day. If this is the case, they may have not yet pulled down the prescription from the pharmacy. In this instance, the Pharmacy can pull down the prescription from the Spine to prepare and dispense this for the patient.

The CLEO SOLO EPS Application will display the contact details of pharmacies within the pharmacy search functionality. This feature can be used to support a process that is put into place for where this scenario occurs.

18.3. Pharmacy System Unavailability

If a pharmacy reports that their system is unavailable, it is important to consider what actions will be taken in this scenario. A process will need to be implemented to alert prescribers not to attempt to send prescriptions to the affected pharmacy.

It will also need to be considered if this will need to be communicated with any patients, and what process will be followed for this. Similarly, it may also need communication with other pharmacies.

19.0. CLEO SOLO EPS System Requirements

It is important to consider the system requirements that the CLEO SOLO EPS application requires to operate as intended. The application requires the following:

- Windows 10 (1709 Onwards)
- Dual Core 2Ghz processor or faster
- Minimum memory dedicated to SOLO EPS of 450MB (per user)
- Optimal Resolution of 1920x1080 (Lower resolutions are supported but will require the user to scroll)
- Install space availability of 450MB
- .net Framework 4.8 runtime
- NHS Digital Identity Agent v2 onwards
- Gemalto Middleware (requirement of NHS Identity Agent)

- HSCN Connectivity
- Microsoft Visual Studio C++ Redistributable for Visual Studio 2019
- Up to date graphics drivers
- Smart card series 8 or 9
- The PIV mini driver is essential for users with series 9 smartcards (2)

Please ensure that the above have been reviewed by your IT department to ensure that the machines that are intended for use of SOLO EPS are setup as expected.

For full details on system requirements, please review the “CLEO SOLO EPS Technical Requirements” documentation.

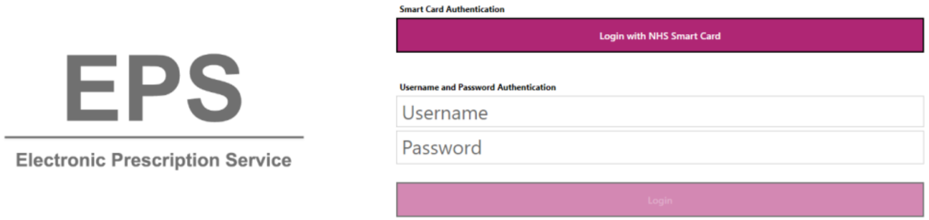
20.0. CLEO SOLO EPS Implementation Guides

20.1. How do I launch the Application?

To access the application, the user must first ensure that the “Solo EPS” application has been installed by their IT department and an icon added to the Desktop.

Locate and double-click the “Solo EPS” icon on the desktop

Once this has been selected, the application will launch and require the user to login to proceed further.

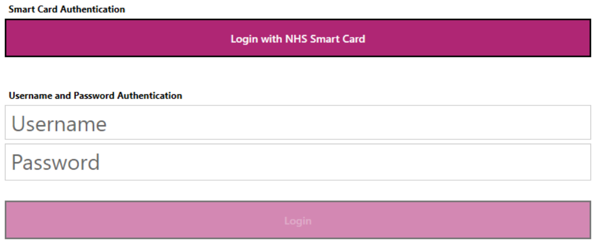


20.2. How do I log in to the Application?

To access the application, the user must first login. Initial users' setup by CLEO Systems will have immediate access to login to the application, with further users being granted access once additional user accounts have been setup. Please refer to section How do I Setup a User Profile within this guide for setting up additional users

20.3. Determine Login Method

The SOLO EPS application supports two methods of Login: Username/Password and Smartcard Login.



20.4. Smartcard Login

If logging in with an NHS Smartcard, the "Login with NHS Smart Card" button should be selected.

Important Notes:

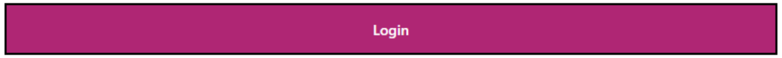
- A user profile must have a smartcard ID present for smartcard login to be permitted.
- A user who wishes to login with their smartcard must have authenticated their smartcard with their local smartcard identity agent.

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

20.5. Username/Password Login

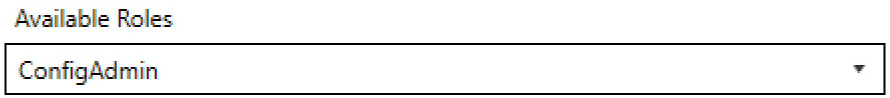
If logging in with a Username and Password, these should be input into the “Username” and “Password” fields. A user’s username and password will be setup within their user profile.

Once the username and password have been input, the “Login” button will begin the login process.



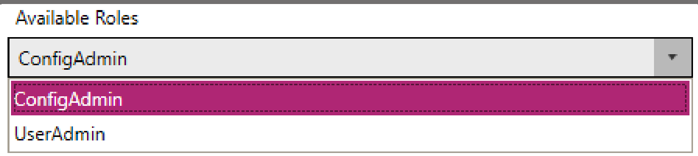
20.6. Selecting a Role

Once the login method has been selected and completed, the next step is to select the appropriate role from the menu. After login, a drop-down menu of available roles will be available. The user must select from the list of available roles that have been assigned to their user profile.



The user must click into the “Available Roles” field to expand the list.

Once the list has been expanded, the relevant role can be selected.

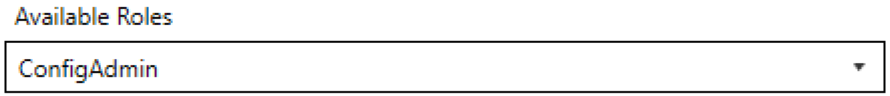


It is important the correct role is chosen for the activities that need to be performed:

- If the user needs to setup and configure sites and departments, the “ConfigAdmin” role should be selected.
- If the user needs to setup and configure user profiles, the “UserAdmin” role should be selected.

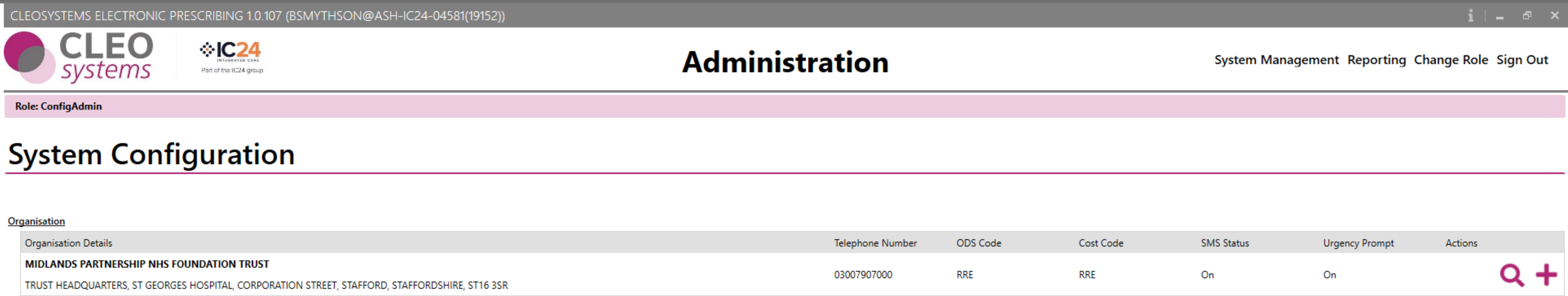
21.0. Configuration Admin Role

For the “ConfigAdmin” role, the user must select the role from the “Available Roles” drop-down menu.



With the role selected, the login process can be finalised with the “I Agree” button.

Once logged into the application, the default view for the Configuration Admin role is the System Configuration view:



21.1. System Management View

21.1.1. Site Setup

Before setting up a site, the user must consider and gather the following prior to initiating the process:

- The Site Name
- The Site ODS Code
- The Site Telephone Number
- The Site Cost Code, 5-digit for Secondary Care or 6-digit for Primary Care
- In the case of sites using the 6-digit cost code – the DIN/Spurious code to be recorded against prescriptions by 'medical prescribers'

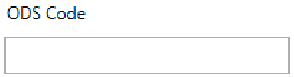
To begin the setup of a site, the user must first note the organisation at the top of the view.

Organisation

Organisation Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
NORTH EAST LONDON NHS FOUNDATION TRUST WEST WING, C E M E CENTRE, MARSH WAY, RAINHAM, RM13 8GQ	03005551200	RAT	RAT	Off	On	

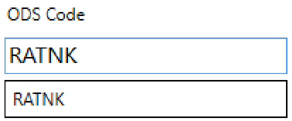
Within the organisation box, the below button will initiate the site setup process.

From here, the user must conduct a “Site Search”. The user should first enter the ODS code of the desired site into the “ODS Code” field.

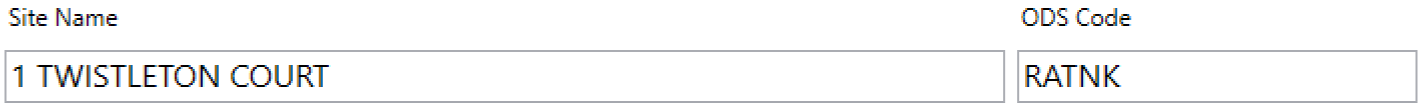


Once the ODS code has been entered, this will present a drop-down menu whereby the user must select the relevant code.

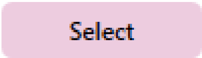
Important Note: A selection from the drop-down menu must be made in order to proceed. The dropdown will start displaying options after the 2 first digits of the ODS code are entered.



Once this has been selected, this will automatically populate the “Site Name” field with the site that is associated with the ODS code entered.



Once both values are confirmed as being correct, the process can proceed with the “Select” button.



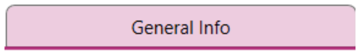
When loading into the Site Configuration form, the user will note that they are not able to amend the following fields:

- Site Name
- Site Address
- ODS Code

Note: All the above data is captured from the national ODS portal, with users not being permitted to amend. If an ODS code or address changes, users can request this to be manually amended by the CLEO team, to reflect the changes in the application.

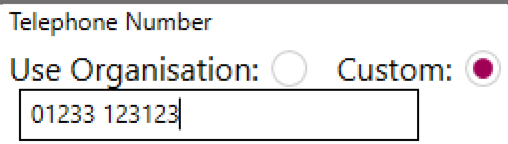
21.1.1.1. Telephone Details

The telephone details can be found within the “General Info” tab.

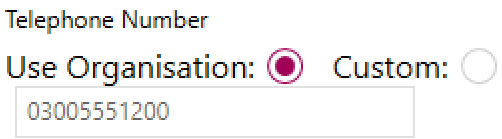


The Telephone Number of the site must be input into the “Telephone Number” field.

If the Site has its own associated telephone number, the user should select the “Custom” button and then input the number into the field.



If the Site does not have its own associated telephone number, the “Use Organisation” button can be selected. This will set the telephone number to match the telephone number set for the organisation. Once this option has been selected, the user will not be able to amend the telephone number and must click the “Custom” button again if they wish to amend the number.



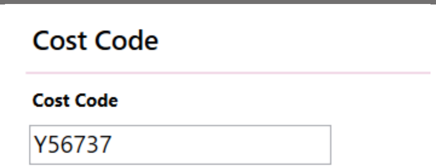
Important Note: The telephone number set within this configuration will determine which telephone number will display at the bottom of the prescription. When a prescriber logs into the application and selects a site to prescribe from, the telephone number associated with the site selected will display on the prescription. Please see section “How to set Prescription Details” for further information.

21.1.1.2. Cost Centre Type

Users will be permitted to determine the Cost Centre Type of the site they are setting up within the “General Info” tab. This will determine what cost code type is used and whether a Spurious code will need to be provided.

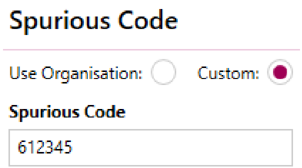
21.1.1.2.1. 6-Digit Cost Centre Type

If “6-Digit Cost Centre” is set, this will allow the user to manually input a 6-digit cost code into the “Cost Code” field. The 6-digit code must start with letter Y.



Important Note: The “Use Organisation” option will only be available if the Organisation has also been set as a 6-digit Cost Centre.

Additionally, users must set the Site’s Spurious code within the “Spurious Code” field as it is a mandatory field.



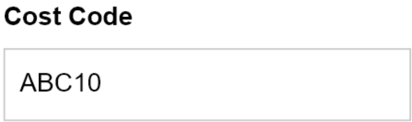
Important Notes:

- When set as a 6-digit cost centre, users within the Site can either use the Spurious code associated with the logged in site or have an individual code set against their user profile. Please see section 5.1.1.4.1 in this guide for how to set a Spurious Code against a user profile.
- The Spurious code will be included in the message sent to the Pharmacy if the prescribing user has logged into the application as the “Medical Prescriber” role, and the Prescriber Type for the users logged in site has been set as a 6-digit cost centre.
- If a prescriber logs into a site that has been configured with the 6-digit cost centre type, the message sent to the pharmacy will contain the 01nn prescriber code type.

21.1.1.2.2. 5-Digit Cost Centre Type

If “5-Digit Cost Centre” is set, a spurious code field will not be present within this setting.

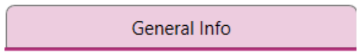
Unlike 6-digit cost centres, the “Cost Code” field will only accept a 5-digit cost code. Please see section 4.1.1.3. below.



Important Note: If a prescriber logs into a site that has been configured with the 5-digit cost centre type, the message sent to the pharmacy will contain the 1nnn prescriber type code.

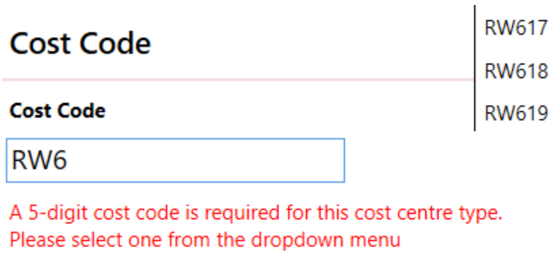
21.1.1.3. Cost Code Details

The cost code details can be found within the “General Info” tab.



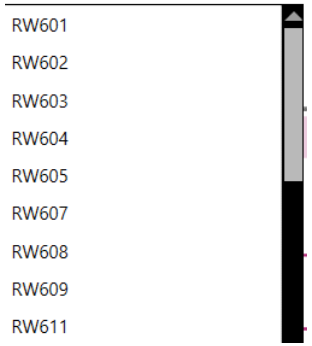
The Cost Code of the site must be input into the “Cost Code” field.

If the Site has its own associated cost code, the user should begin to input the code into the field.



21.1.1.3.1. 5-Digit Cost Centres

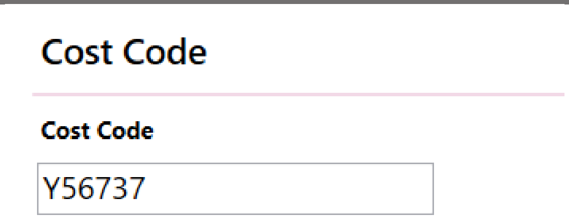
Once the input of a number has begun, the user will be presented with a drop-down menu of codes that match the code entered. A selection from this menu must be made.



Important Note: The cost code set within this configuration will determine which cost code will display at the bottom of the prescription. When a prescriber logs into the application and selects a site to prescribe from, the cost code associated with the site selected will display on the prescription. Please see section "How to set Prescription Details" for further information.

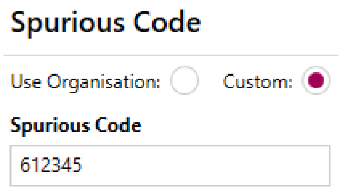
21.1.1.3.1. 6-Digit Cost Centres

For 6-digit cost centre types, users must enter a 6-digit cost code into the Cost Code field. The 6-digit code must start with letter Y.



21.1.1.4. Spurious Code

The Spurious Code field will only be present if the site has been configured as a “6-Digit Cost Centre”.

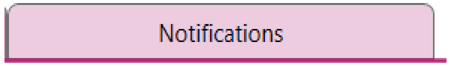


Important Notes:

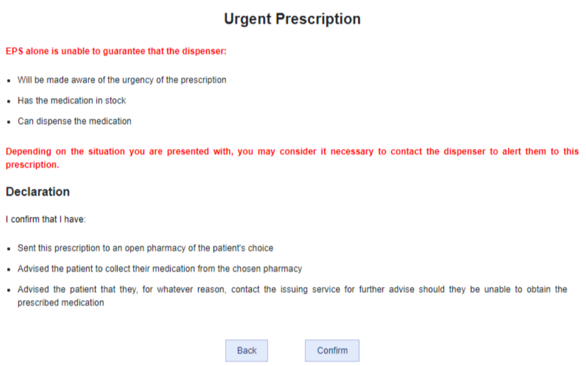
- The spurious code must begin with a “6” and the code must be 6 characters in length.
- The Spurious code will be included in the message sent to the Pharmacy if the prescribing user has logged into the application as the “Medical Prescriber” role, and the Prescriber Type for the users logged in site that has been set as a 6-digit cost centre.
- If a spurious code has more than 6 digits and starts with a letter, e.g G6800577, users must remove the first letter (G) and last number in the end (7) when entering it in the field.
- Prescribers within the Site can either use this Spurious code associated with the logged in site or have an individual code set against their user profile. Please see section 5.1.1.4.1 in this guide for how to set a Spurious Code against a user profile.

21.1.1.5. Urgency Prompt Setting

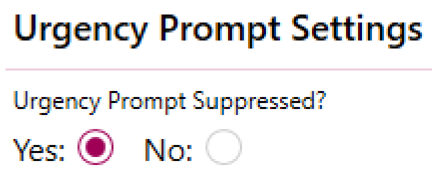
The Urgency Prompt Settings can be found within the “Notification” tab.



This setting determines whether the “Urgency Prompt” is suppressed during the prescribing process. This prompt appears prior to the prescriber reaching the script signing stage. This prompt will appear as below:



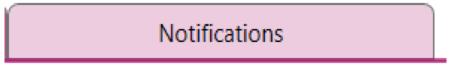
If the user wishes this prompt not to appear, the “Yes” button should be selected. Alternatively, the “No” option should be selected if the user wishes the prompt to appear.



Important Note: If the Urgency Prompt has been Suppressed at Organisation level, this option will be disabled, and a selection cannot be made.

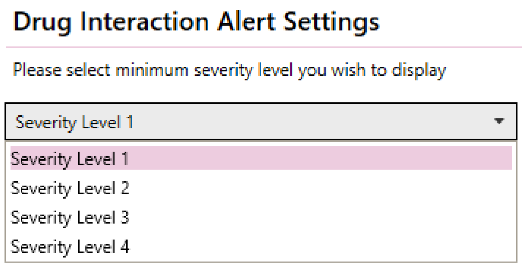
21.1.1.6. Drug Interaction Alert Setting

The Drug Interaction Alert Settings can be found within the "Notification" tab.



When prescribers are adding medications to a prescription in the prescribing module, if an interaction is identified between an item they have selected from the search and a medication that is on the prescription already, they will receive a prompt informing of an interaction.

The user can set the minimum severity level within the drop-down menu, where 1 is the lowest risk level and 4 is the highest.



If the user sets the level to 1, this will display all alerts with a severity level of 1 or greater.

If the user sets the level to 2, this will display all alerts with a severity level of 2 or greater.

If the user sets the level to 3, this will display all alerts with a severity level of 3 or greater.

If the user sets the level to 4, this will display alerts with a severity of level 4 only.

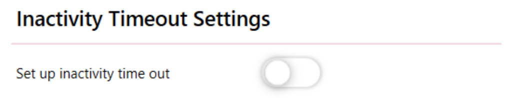
21.1.1.7. Inactivity Time Out Settings

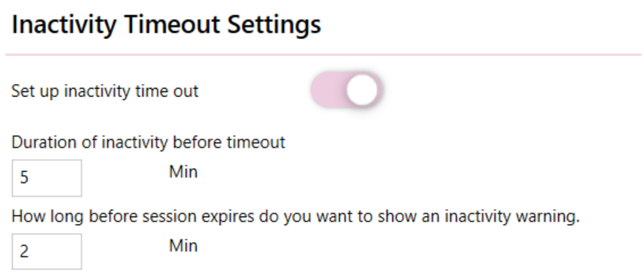
The session Inactivity Time Out can be found within the “Notifications” tab.

If users are inactive for a determined period of time (set with this configuration), a prompt will display asking users If they want to stay logged in or log out.

Admin users can choose the session’s inactivity period duration and when the prompt should display before session expires.

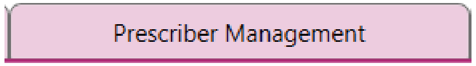
Users will need to toggle the button to the right to enable configuration: this will then display the settings that can be configured and the number of minutes to be manually entered.



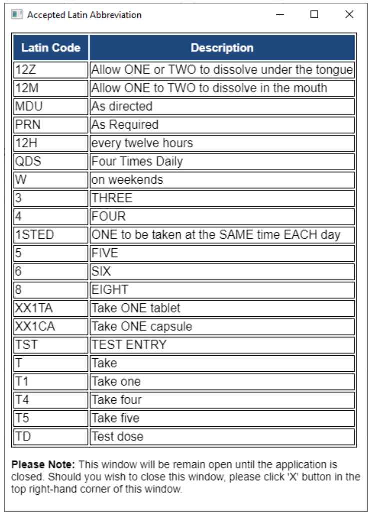


21.1.1.8. Latin Abbreviations Configuration

The Latin Abbreviation Configuration can be found within the “Prescriber Management” tab.



Within the prescribing module, prescribers are permitted to enter Latin Abbreviation short codes into the “Directions for Use” field. When these are entered, these will translate into the appropriate instruction when the medication is added to the prescription. These short codes are visible if the prescriber selects the “Accepted Latin Abbreviations” button:



Accepted Latin Abbreviation

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
XX1TA	Take ONE tablet
XX1CA	Take ONE capsule
TST	TEST ENTRY
T	Take
T1	Take one
T4	Take four
T5	Take five
TD	Test dose

Please Note: This window will be remain open until the application is closed. Should you wish to close this window, please click 'X' button in the top right-hand corner of this window.

For example, if the user enters “12Z” into the Directions for Use field, when the medication is added to the prescription, “Allow ONE or TWO to dissolve under the tongue” will be applied.

Within the admin module it is possible to set which Latin Abbreviations are available for users and allows for existing codes to be edited/removed or new codes added for prescribers to use. The following options are available within the drop-down menu:

Organisation Default List – This is a standard list of Latin Abbreviation short codes provided by CLEO Systems.

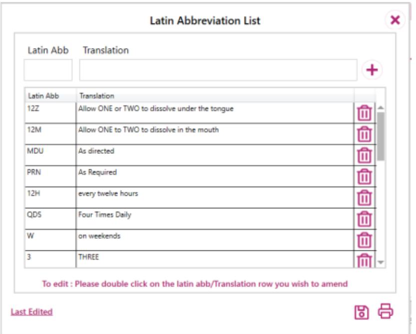
Organisation Custom List – This is a customised list of Latin Abbreviation codes that can be used across the organisation by multiple sites.

Current Site Custom List – This is a customised list of Latin Abbreviation codes that are configurable for the current site.

Important Note: The setting selected here will apply to any departments associated with the site.

If the user selects either of the "Custom" lists, this will enable the "Edit" button for the user to select.

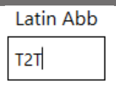
This will then display to the user a window whereby they can view, amend, add, or remove any short codes from the list.



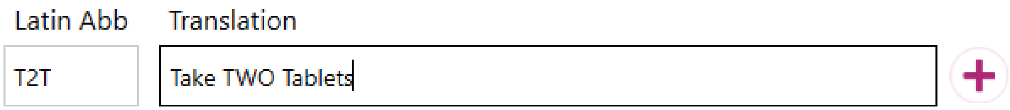
21.1.1.8.1. Adding a New Latin Abbreviation Code

In order to add a new code, the user must firstly enter the short code into the "Latin Abb" field.

Important Note: Special characters cannot be used.



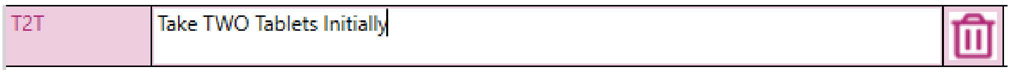
The user must then enter the text they wish the code to translate to when adding the medication to the prescription within the “Translation” field.



Once the desired text has been entered, this code can be added to the list with the “+” button.

21.1.1.8.2. Amending a Latin Abbreviation Code

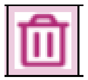
In order to amend either the Code or Translation, the user must double-click into the field they wish to amend.



To confirm and save the amendment, the user must click out of the field they are amending.

21.1.1.8.3. Deleting a Latin Abbreviation Code

In order to remove a code from the list, the user must click the “Delete” icon on the code that they wish to remove.



Once selected, the user will be prompted to confirm that they wish to remove the code.

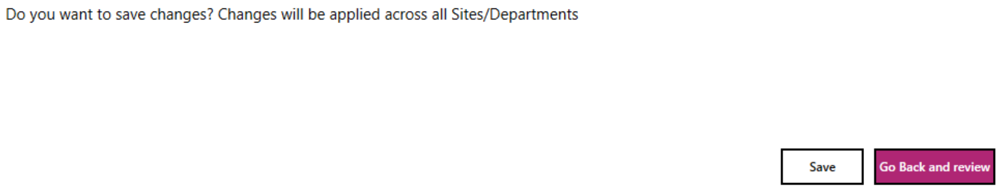
Selecting “Confirm” will remove the code from the list.

Selecting “Cancel” will return the user to the view and the code will not be removed.

21.1.1.8.4. Saving Changes Made to Latin Abbreviation List

Once all amendments have been made, the user can save with the “Save” button.

The user will then be prompted to confirm that they wish to proceed and save all changes.



Important Notes:

- When amending the Organisation Custom List, users must be mindful that any other sites within the organisation that are also using this custom list will also be affected by the changes made.
- If using the Current Site Custom List, only the current site will be affected by the changes saved.

Selecting “Save” will save all changes made and close the Latin Abbreviation list.

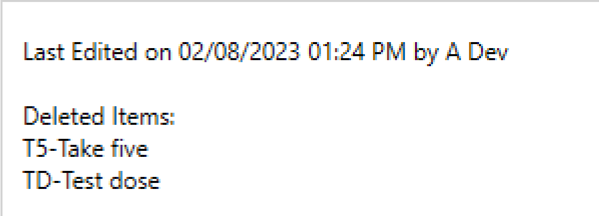
Selecting “Go Back and Review” will not save the changes and return the user to the Latin Abbreviation list.

21.1.1.8.5. Reviewing Changes Made to the Latin Abbreviation List

If the user wishes to review what changes were last made within the list, the user must select the “Last Edited” button.

Last Edited

This will display to the user a box that will show any changes made to the list, including who made the change and when the change was made.



21.1.1.8.6. Printing the List

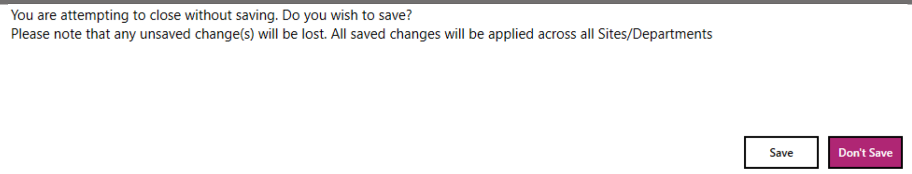
If the user wishes to print out a copy of the Latin Abbreviation list, the “Print” button must be selected.

Once selected, the user will then be permitted to select an appropriate printer to send the document to for printing.

21.1.1.8.7. Closing the Latin Abbreviation List

The user is permitted to close the Latin Abbreviation list at any time with the “X” button in the top right-hand corner of the list.

If the user has unsaved changes and attempts to close the list, they will receive the below prompt.



Selecting “Save” will apply the changes and will close the list.

Selecting “Don’t Save” will NOT apply the changes and will close the list.

21.1.1.9. Saving Changes

Once all required setting shave been configured within the site profile, the profile must be saved with the “Save” button.

Users will be unable to save if mandatory fields have not been correctly filled.

Upon selecting to save, the user will then be returned to the “System Configuration” area whereby the newly setup site will be present. The sites will display under the “Associated Sites and Departments” header.

Users configuring a site, can go back anytime from the current screen by clicking on the “Close” button:

Organisation

Organisation Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
NORTH EAST LONDON NHS FOUNDATION TRUST WEST WING, C E M E CENTRE, MARSH WAY, RAINHAM, RM13 8GQ	03005551200	RAT	RAT	Off	On	

Associated Sites and Departments

Site Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
> **STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT)** CHERRY TREE HOUSE, CHERITON HIGH STREET, FOLKESTONE, KENT, CT18 8AN	03005551200	RATF2	RATF2	Off	On	
STH KENT COAST NEURO & LD, DOVER (E-PACT) DOVER HEALTH CENTRE, MAISON DIEU ROAD, DOVER, KENT, CT16 1RH	03005551200	RATF3	RATF3	Off	On	
1 TWISTLETON COURT TWISTLETON COURT, PRIORY HILL, DARTFORD, KENT, DA1 2EN	03005551200	RATNK	RATNK	Off	Off	

This will prompt users that there are Unsaved changes.

Warning - Unsaved Changes

There are unsaved changes on this page.
Are you sure you wish to leave this page?

Continue | Cancel

21.1.2. Site Amendment

Once a site has been created, it is possible to amend the site configuration if changes are required. To amend a site, the user must first identify the site they wish to amend within the "Associated Sites and Departments" section.

1 TWISTLETON COURT TWISTLETON COURT, PRIORY HILL, DARTFORD, KENT, DA1 2EN	03005551200	RATNK	RATNK	Off	Off	

The user must then select the "Edit" button on the right-hand side of this site.

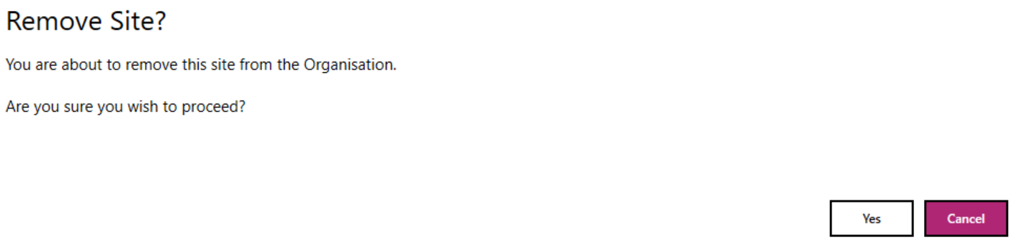
The user will then be taken into the configuration for the selected Site, where they are free to configure the site as required. Please refer to the Site Setup section of this guide for instructions on how to configure a site.

21.1.3. Removal of a Site

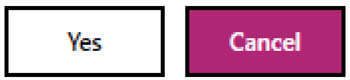
Once a site has been created, it is possible to delete the site if the site is no longer required. To delete a site, the user must first identify the site they wish to delete within the "Associated Sites and Departments" section.

The user must then select the "Delete" button on the right-hand side of this site.

Upon selecting to delete the site, the user must then confirm that they wish to proceed and remove the site.



If the site is to be removed, the "Yes" button should be selected. If the user wishes to cancel the action of removing the site, the "Cancel" button should be selected.



Important Notes:

- The deletion of a site is not a reversable action. Users must be sure they wish to remove the site before confirming the action. Should the user wish to re-instate the site after deletion, the site will need to be setup again. Please refer to the Site Setup section for instructions on how to complete this action.
- Admin users should also consider users belonging to the site they wish to delete and whether they need to be assigned to other sites prior to the deletion. If users only have the site that needs deletion assigned and site gets deleted prior adding new sites to their profiles, User Administrators will be unable to see the user profile as they will only be able to view users assigned to their logged in site/department.

21.1.4. Department Setup

Before setting up a site, the user must consider and gather the following prior to initiating the process:

- The Department Name
- The Department Telephone Number
- The Department Cost Code, 5-digit for Secondary Care or 6-digit for Primary Care
- In the case of Departments using the 6-digit cost code – the DIN/Spurious code to be recorded against prescriptions by 'medical prescribers'

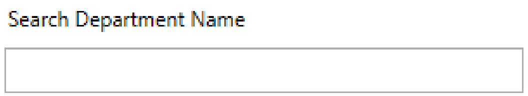
To begin the setup of a site, the user must first identify the site they wish to create a department within. These will display under the "Associated Sites and Departments" section.


Associated Sites and Departments

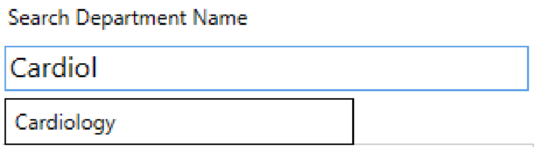
Site Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT) CHERRY TREE HOUSE, CHERITON HIGH STREET, FOLKESTONE, KENT, CT18 8AN	03005551200	RATF2	RATF2	Off	On	

Within the site box, the below button will initiate the department setup process.

From here, the user must conduct a “Department Selection”. The user should begin to enter the department name within the “Search Department Name” field.

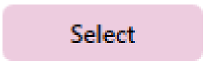


Once the user begins to type the department name, a drop-down menu will be presented and offer department suggestions. A selection from this menu must be made.

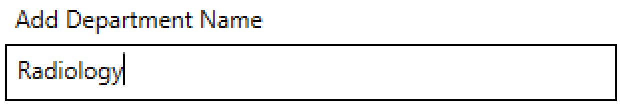


Once this has been selected, this will automatically populate the Department Name field with the Department selected.

Once the department name has been confirmed as being correct, the process can proceed with the “Select” button.



If the desired department name does not appear within the drop-down menu, a “Custom” department can be setup. The user should enter the desired department name into the “Add Department Name” field.



Once the custom department name has been confirmed as being correct, the "Add" button should be selected.

When loading into the Department Configuration form, the user will note that they are not able to amend the following fields:

- Department Name
- Department Address

Please Note: The Department address will be the one acquired from the Site under where Department sits.

21.1.4.1. Telephone Details

Firstly, the Telephone Number of the department must be input into the "Telephone Number" field.

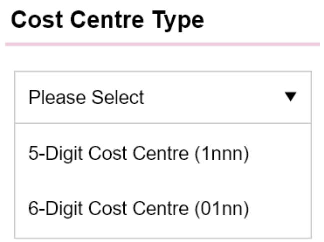
If the department has its own associated telephone number, the user should select the "Custom" button and then input the number into the field.

If the Site does not have its own associated telephone number, the "Use Organisation" or "Use Site" buttons can be selected. This will set the telephone number to match the telephone number set for the organisation or the associated site. Once this option has been selected, the user will not be able to amend the telephone number and must click the "Custom" button again if they wish to amend the number.

Important Note: The telephone number set within this configuration will determine which telephone number will display at the bottom of the prescription. When a prescriber logs into the application and selects a site to prescribe from, the telephone number associated with the site selected will display on the prescription. Please see section “How to set Prescription Details” for further information.

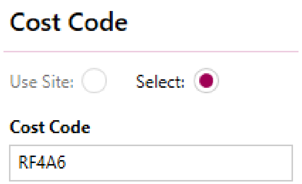
21.1.4.2. Cost Centre Type

Users will be permitted to determine the Cost Centre Type of the department they are setting up. This will determine what cost code type is used and whether a Spurious code will need to be provided.



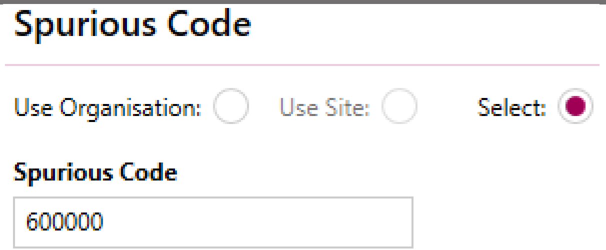
21.1.4.2.1. 6-Digit Cost Centre Type

If “6-Digit Cost Centre” is set, this will allow the user to input a 6-digit cost code into the “Cost Code” field.



Important Note: The “Use Site” option will only be available if the associated Site has also been setup as a 6-digit cost centre.

Additionally, users must set the Site’s Spurious code within the “Spurious Code” field as it is mandatory.



Important Notes:

- When set as a 6-digit cost centre, users within the department can either use the Spurious code associated with the logged in department or have an individual code set against their user profile. Please see section 5.1.1.4.1 in this guide for how to set a Spurious Code against a user profile.
- The Spurious code will be included in the message sent to the Pharmacy if the prescribing user has logged into the application as the "Medical Prescriber" role, and the Prescriber Type for the users logged in department has been set as a 6-digit cost centre.
- If a prescriber logs into a department that has been configured with the 6-digit cost centre type, the message sent to the pharmacy will contain the 01nn prescriber code type.

21.1.4.2.2. 5-Digit Cost Centre Type

If "5-Digit Cost Centre" is set, a spurious code field will not be present within this setting.

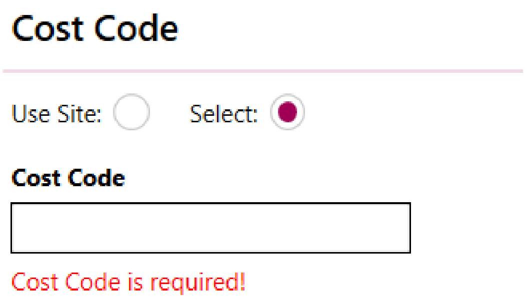
Unlike 6-digit cost centres, the "Cost Code" field will only accept a 5-digit cost code. Please see section 4.1.4.3. below.

Important Note: If a prescriber logs into a site that has been configured with the 5-digit cost centre type, the message sent to the pharmacy will contain the 1nnn prescriber type code.

21.1.4.3. Cost Code Details

Secondly, the Cost Code of the department must be input into the "Cost Code" field.

If the Department has its own associated cost code, the user should select the "Select" button and begin to input the code into the field.

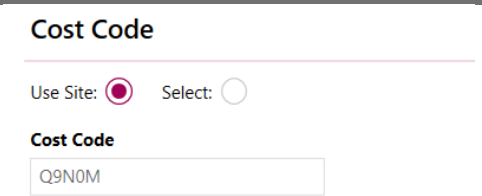


Important Note: The Use Site options will only display if the associated Site/Organisation are also set as 5-digit cost centres.

21.1.4.3.1. 5-Digit Cost Centres

Once the input of a number has begun, the user will be presented with a drop-down menu of codes that match the code entered. A selection from this menu must be made.

Alternatively, if the department does not have its own associated cost code, the "Use Site" button can be selected. This will set the cost code to match the cost code set for the associated site. Once this option has been selected, the user will not be able to amend the cost code and must click the "Custom" button again if they wish to amend the number.



Important Notes: The cost code set within this configuration will determine which cost code will display at the bottom of the prescription. When a prescriber logs into the application and selects a department to prescribe from, the cost code associated with the department selected will display on the prescription. Please see section "How to set Prescription Details" for further information.

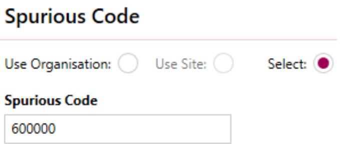
Once the Cost Code has been selected, this will automatically populate the configuration with the address that is associated within this code.

21.1.4.3.2. 6-Digit Cost Centres

For 6-digit cost centre types, users must manually enter a 6-digit cost code into the Cost Code field.

21.1.4.4. Spurious Code

The Spurious Code field will only be present if the Department has been configured as a "6-Digit Cost Centre".



Important Notes:

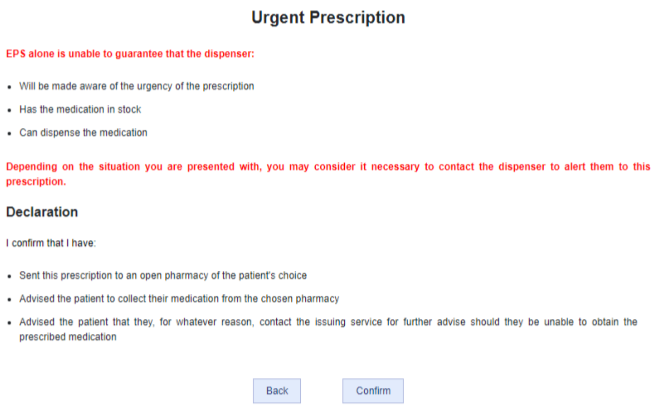
- The spurious code must begin with a "6" and the code must be 6 characters in length.
- The Spurious code will be included in the message sent to the Pharmacy if the prescribing user has logged into the application as the "Medical Prescriber" role, and the Prescriber Type for the users logged in department has been set as a 6-digit cost centre.
- If a spurious code has more than 6 digits and starts with a letter, e.g G6800577, users must remove the first letter (G) and last number in the end (7) when entering it in the field

- Prescribers within the department can either use this Spurious code associated with the logged in site or have an individual code set against their user profile. Please see section 5.1.1.4.1 in this guide for how to set a Spurious Code against a user profile.

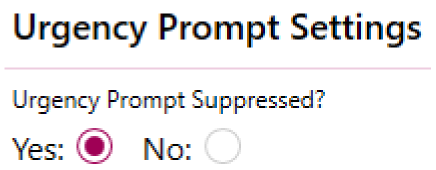
21.1.4.5. Urgency Prompt Setting

Lastly, the Urgency Prompt Suppression setting must be set.

This setting determined whether the "Urgency Prompt" is suppressed during the prescribing process. This prompt appears prior to the prescriber reaching the script signing stage. This prompt will appear as below:



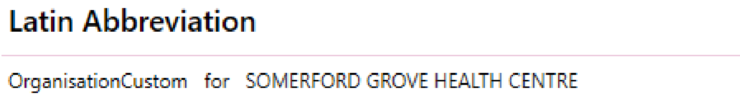
If the user wishes this prompt not to appear, the "Yes" button should be selected. Alternatively, the "No" option should be selected if the user wishes the prompt to appear.

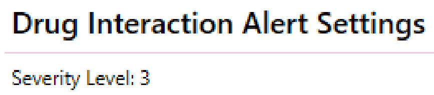


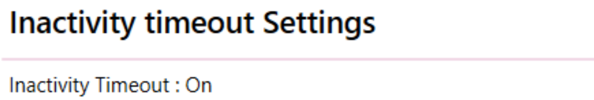
Important Note: If the Urgency Prompt has been Suppressed at Organisation level, this option will be disabled, and a selection cannot be made.

21.1.4.6. Latin Abbreviations, Drug Interaction Alert and Inactivity Timeout Settings

It is not currently possible to configure either the Latin Abbreviation, Drug Interaction and Inactivity Timeout at a department level. Instead, the department will inherit the settings set within the site configuration.







21.1.4.7. Saving Changes

Once all required setting shave been configured within the department profile, the profile must be saved with the “Save” button.

Users will be unable to save if mandatory fields have not been correctly completed.

Upon selecting to save, the user will then be returned to the “System Configuration” area whereby the newly setup department will be present.

To view the department, the user must select the “>” button to the left-hand side of the Site that the department sits within

Associated Sites and Departments

Site Details
STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT) CHERRY TREE HOUSE, CHERITON HIGH STREET, FOLKESTONE, KENT, CT18 8AN

Upon selecting to expand the site, the associated departments will then display.

Associated Sites and Departments

Site Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT) CHERRY TREE HOUSE, CHERITON HIGH STREET, FOLKESTONE, KENT, CT18 8AN	03005551200	RATF2	RATF2	Off	On	
Department Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
Cardiology	03005551200	RATF2	RATF2	Off	On	

21.1.5. Department Amendment

Once a department has been created, it is possible to amend the department configuration if changes are required. To amend a department, the user must first identify the department they wish to amend within the “Associated Sites and Departments” section.

Department Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
Cardiology	03005551200	RATF2	RATF2	Off	On	

The user must then select the “Edit” button on the right-hand side of this department.

The user will then be taken into the configuration for the selected Department, where they are free to configure the department as required. Please refer to section “How to Setup a Department” for instructions on how to configure a department.

21.1.6. Removal of a Department

Once a department has been created, it is possible to delete the department if it is no longer required. To delete a department, the user must first identify the one they wish to delete within the “Associated Sites and Departments” section.

Department Details	Telephone Number	ODS Code	Cost Code	SMS Status	Urgency Prompt	Actions
Cardiology	03005551200	RATF2	RATF2	Off	On	

The user must then select the “Delete” button on the right-hand side of this department.

Upon selecting to delete the department, the user must then confirm that they wish to proceed and remove the department.

Remove Site?

You are about to remove this site from the Organisation.

Are you sure you wish to proceed?

Yes Cancel

If the site is to be removed, the “Yes” button should be selected. If the user wishes to cancel the action of removing the site, the “Cancel” button should be selected.

Yes Cancel

Important Note: The deletion of a department is not a reversable action. Users must be sure they wish to remove the department before confirming the action. Should the user wish to re-instate the department after deletion, the site will need to be setup again. Please refer to the Department Setup section for instructions on how to complete this action.

21.2. Reporting View

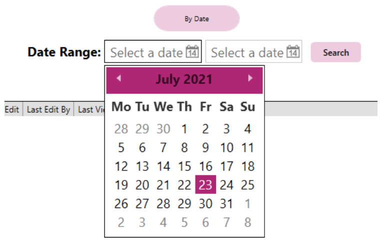
Reporting view is configurable and will be available in the UI only as per customer agreement to display it or not.

To access the reporting functionality, the user will need to select “Reporting” menu option from the top right of the application:

System Management Reporting Change Role Sign Out

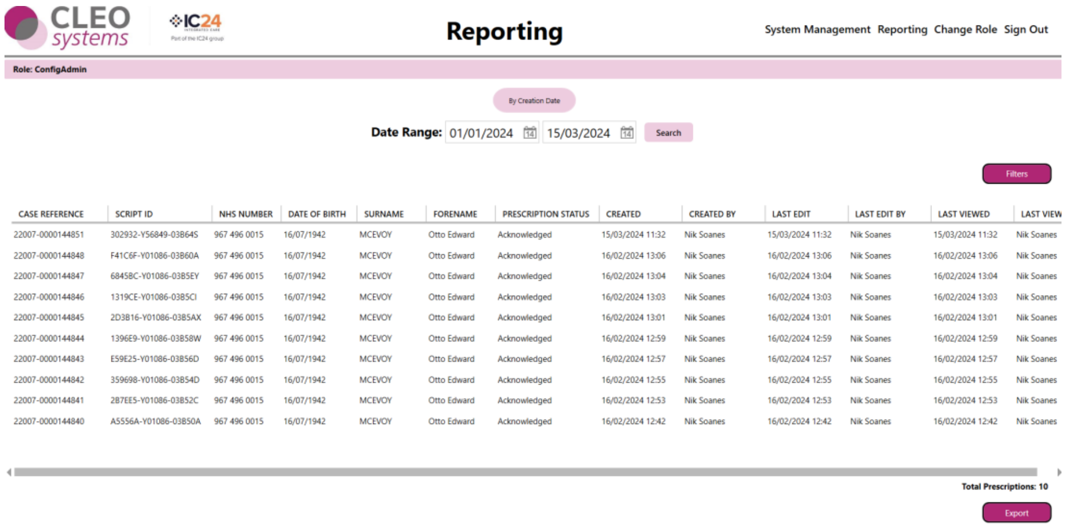
After selecting “Reporting”, the user will be taken to the reporting search functionality:

The user will be required to select a date range to search by. When clicking into the date fields, a calendar tool will appear to support the selection of a date. When a date is selected within the calendar tool, the selected date will then populate the date field.



Important Note: It is not mandatory for the user to input an end date. If this is not included, the search will display prescriptions created between the beginning date entered and the time that the "Search" button is clicked.

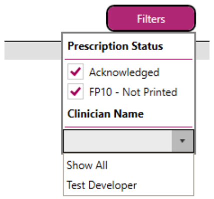
Once a date range has been entered, click Search. Results of prescriptions issued for the organisation will be presented as follows:



CASE REFERENCE	SCRIPT ID	NHS NUMBER	DATE OF BIRTH	SURNAME	FORENAME	PRESCRIPTION STATUS	CREATED	CREATED BY	LAST EDIT	LAST EDIT BY	LAST VIEWED	LAST VIEW
22007-0000144851	302932-Y56849-03B64S	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	15/03/2024 11:32	Nik Soanes	15/03/2024 11:32	Nik Soanes	15/03/2024 11:32	Nik Soanes
22007-0000144848	F41C6F-Y01086-03B60A	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 13:06	Nik Soanes	16/02/2024 13:06	Nik Soanes	16/02/2024 13:06	Nik Soanes
22007-0000144847	6845BC-Y01086-03B5EY	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 13:04	Nik Soanes	16/02/2024 13:04	Nik Soanes	16/02/2024 13:04	Nik Soanes
22007-0000144846	1319CE-Y01086-03B5CI	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 13:03	Nik Soanes	16/02/2024 13:03	Nik Soanes	16/02/2024 13:03	Nik Soanes
22007-0000144845	2D3B16-Y01086-03B5AX	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 13:01	Nik Soanes	16/02/2024 13:01	Nik Soanes	16/02/2024 13:01	Nik Soanes
22007-0000144844	1396E9-Y01086-03B58W	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 12:59	Nik Soanes	16/02/2024 12:59	Nik Soanes	16/02/2024 12:59	Nik Soanes
22007-0000144843	E59E25-Y01086-03B56D	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 12:57	Nik Soanes	16/02/2024 12:57	Nik Soanes	16/02/2024 12:57	Nik Soanes
22007-0000144842	359698-Y01086-03B54D	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 12:55	Nik Soanes	16/02/2024 12:55	Nik Soanes	16/02/2024 12:55	Nik Soanes
22007-0000144841	2B7EE5-Y01086-03B52C	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 12:53	Nik Soanes	16/02/2024 12:53	Nik Soanes	16/02/2024 12:53	Nik Soanes
22007-0000144840	A5556A-Y01086-03B50A	967 496 0015	16/07/1942	MCEVOY	Otto Edward	Acknowledged	16/02/2024 12:42	Nik Soanes	16/02/2024 12:42	Nik Soanes	16/02/2024 12:42	Nik Soanes

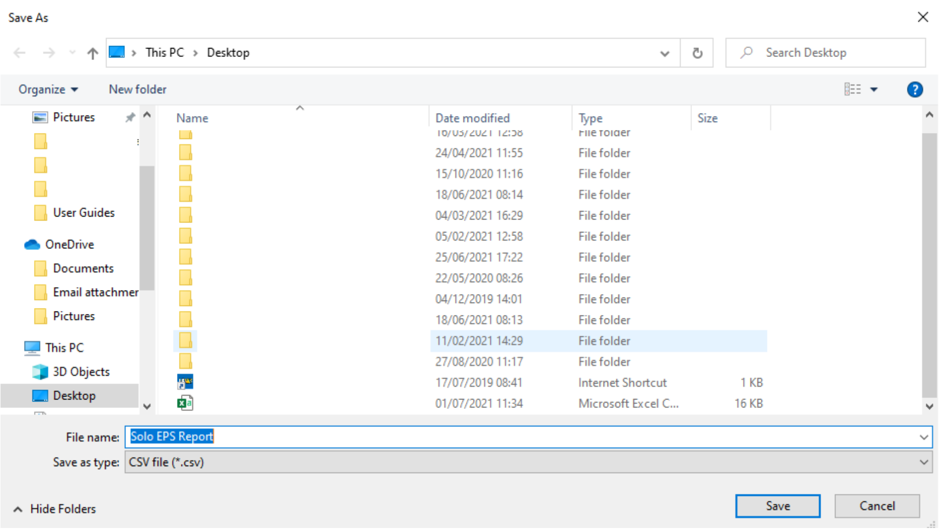
From here the user can filter by Prescription Status or Clinician Name by selecting the "Filters" button.

Within the list, the user must then tick the filters they wish to apply. The filters will be automatically applied when selected and the view will automatically refresh.



The user can export the results to a CSV file by selecting the Export button in the bottom right of the application:

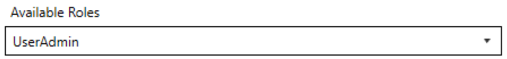
After clicking “Export”, the user will have the option to name the file and save to a location on their PC:



Please Note: The "Created" column in the Reporting view shows the date/time when the prescribing session has started.

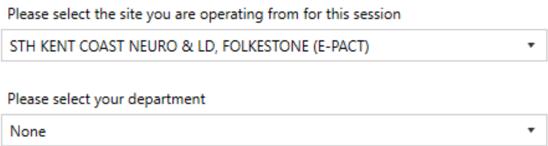
22.0. User Management Role

For the "UserAdmin" role, the user must select the role from the "Available Roles" drop-down menu.



Once this has been selected, the user must select which Site/Department they wish to login under. It is important to note that the user will only be able to administer user profiles for within the site/department they login under.

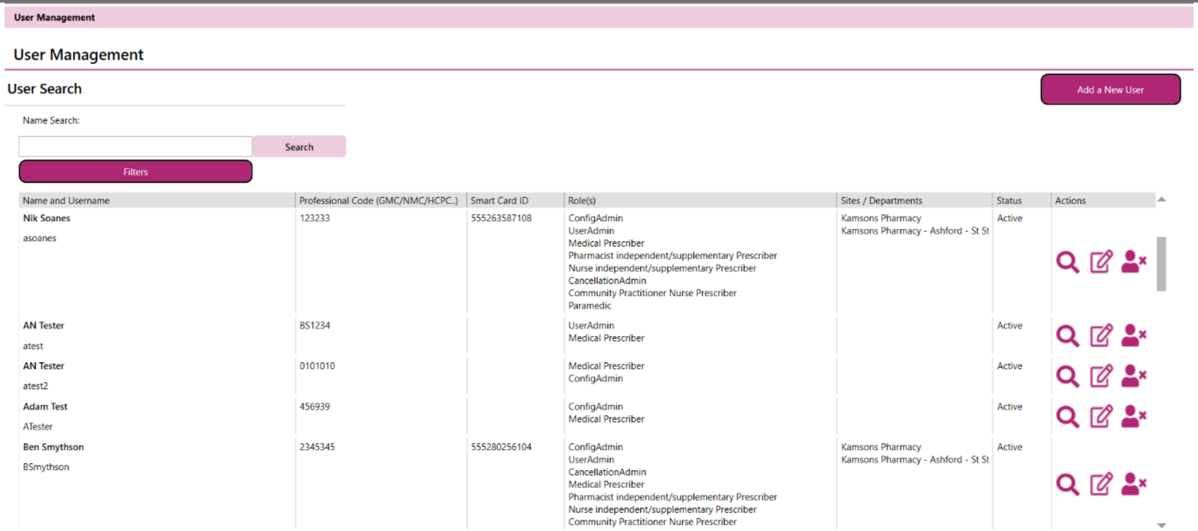
The user must click into either the Site or Department fields and select from the list of available sites. The sites/departments available within these menus will be determined by the sites and departments the user has assigned to their user profile. Please see section How do I Setup a User Profile for further information.



Once a selection has been made from the above menus, the login process can be finalised with the "I Agree" button.

22.1. User Management View

Once logged into the application, the default view for the User Admin role is the User Management view:



22.1.1. User Profile Setup

Before setting up a User, the user must consider and gather the following prior to initiating the process:

- The user’s full name
- The user’s smartcard ID
- (For prescribing users) The user’s professional code
- The site/departments the user will be working within
- (For prescribing users) The users prescriber type
- (For “Medical Prescribers” in the primary care setting) The user’s DIN/Spurious code if individual one is required.

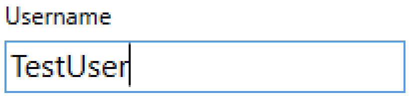
In order to begin the process of setting up a user, the “Add a New User” button should be selected.

22.1.1.1. User Details

This will display the user profile form. The first steps are to complete the "User Details" section. This will include:

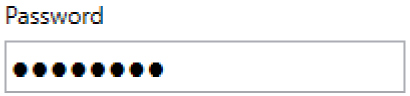
Username

Note: The username can contain letters and numbers only



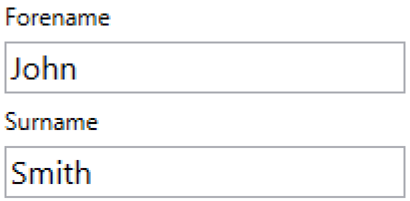
Password

Note: The password must contain at least 1x lowercase character, 1x uppercase character, 1x special character and must be at least 8 characters in length



Full Name

Setting the users full name within the "Forename" and "Surname" fields. Those fields require a minimum of two letters to be entered.

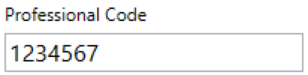


Professional Code

If setting up a prescribing user, the users' professional code must be entered within the "Professional Code" field as it's a mandatory field.

Important Notes

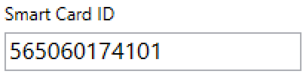
- The professional field accepts the following code formats: GMC, NMC and HCPC.
- The professional code entered into the user's profile will display at the bottom of the prescription.
- The professional code field is not mandatory and will not need to be completed for non-clinical users.



Setting the users smartcard ID within the "Smart Card ID" field

Important Notes

- The smartcard ID field is not a mandatory field for admin users and does not need to be completed. If the field has not been completed, the admin user must login to the application with their username and password and will not be permitted to login until their smartcard ID has been added.
- As SOLO EPS requires a valid smartcard role and activities in order to permit prescribing, a Smart Card ID must be set on a prescriber's profile. A prescriber will not be permitted to prescribe if logging in with username and password.

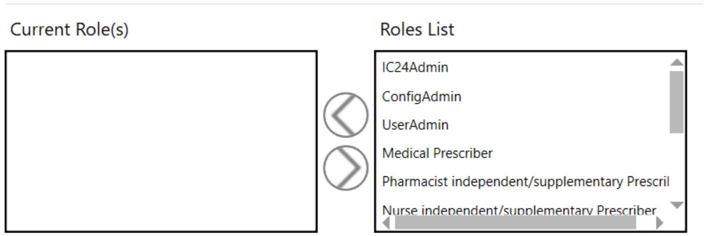


Important Note: This code will NOT be sent within the message that is sent to the Pharmacy but will be recorded against any prescription generated by the user within the reporting data. This will support the reporting team when generating costing reports etc.

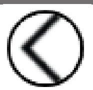
22.1.1.2. Assigning Roles

Once all the user details have been input, the user must then assign the relevant roles to a user. This is to be completed within the "Role Selection" area.

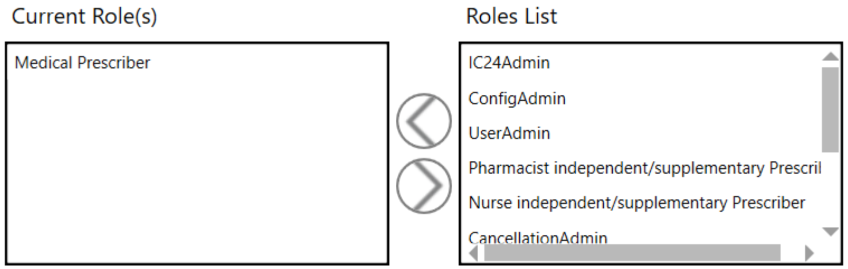
The "Current Role(s)" box shows all roles that are currently assigned to the user profile. The "Roles List" shows all the roles that are available to be assigned to the user.



When selecting the desired role within the "Role List" the "<" button will assign the role to the user.



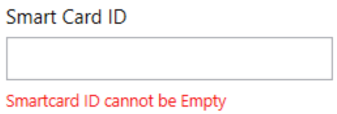
Once assigned, this will then appear within the “Current Role(s)” list.



Important Notes:

As many roles as required by the user can be assigned to the profile.

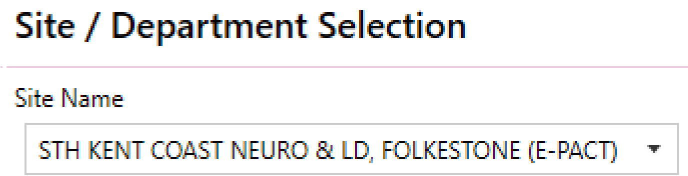
Prescriber users and cancellation admin users require the smartcard ID to be entered.



22.1.1.3. Site/Department Assignment

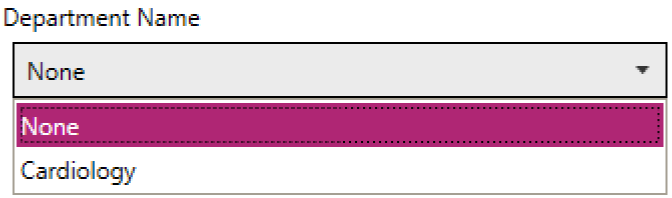
Once the appropriate roles have been assigned, the final step is to assign the user profile to the sites and departments they will be working from.

To select a site to assign the user to, the user must expand the "Site Name" drop-down menu within the "Site / Department Selection" area.



Important Note: a user admin can assign a new user to any site or department available within the organisation, however they can only view existing user profiles which have the same site or department used by user admin to log in.

Once the site has been selected from the menu, the user must then select whether they wish to assign the user to any departments. A selection can be made from the "Department Name" drop-down menu.



Important Notes:

- All users must have at least one site assigned
- If the user wishes to assign the user profile at "Site Level", "None" should be selected from the department drop-down menu. When the user then logs in with their profile, they will only need to select a site. When selecting this site, it will be the details within the site profile that determine the details present on the prescription.

- If the user wishes to assign a user profile at "Department Level", any of the available departments within the drop-down menu must be selected. When the user then logs in with their profile, they must make a department selection. When selecting a department, it will be the details within the department profile that determines the details present on the prescription.
- All mandatory fields will be highlighted if not filled up and users will not be able to save a profile until all fields are correctly filled.
- For further details on the above, please see section "How to set Prescription Details".

Once either the site or department have been selected, the assignment can be completed by selecting the "Select" button.

Select

The assignment will then appear in the bottom left-hand corner of the profile.

If the user has been assigned at site level, this will appear as below.

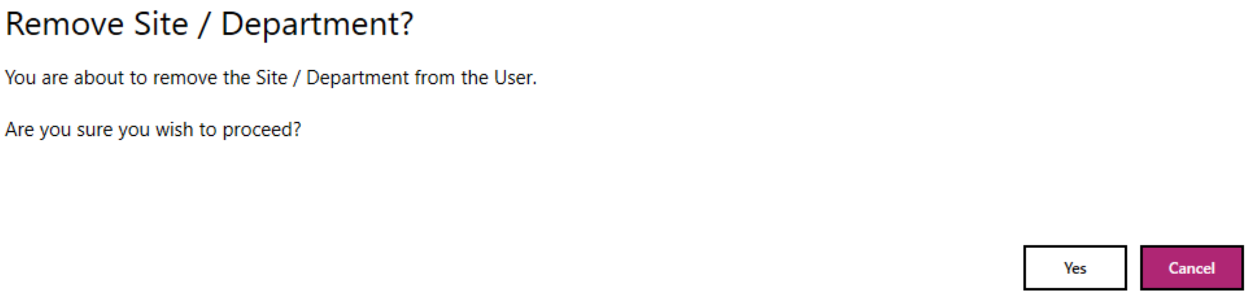
Site(s)	Department(s)	Actions
STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT)	None	

If the user has been assigned to a department, this will appear as below.

Site(s)	Department(s)	Actions
STH KENT COAST NEURO & LD, FOLKESTONE (E-PACT)	Cardiology	

If the user wishes to remove an assignment, the "Delete" button should be selected against the assignment to be removed.

The user will then be prompted to confirm that they wish to proceed with the removal of the site/department.



If the user wishes to proceed with the removal of the site, the “Yes” button should be selected.

Important Note: Once a site/department has been removed, the user is not able to undo this action and must re-apply the assignment to the user.

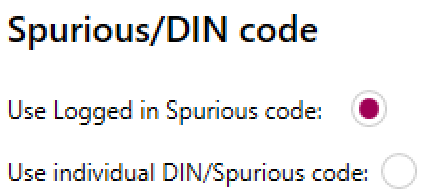
If the user wishes to cancel the action of removing the site/department assignment, the “Cancel” button should be selected.

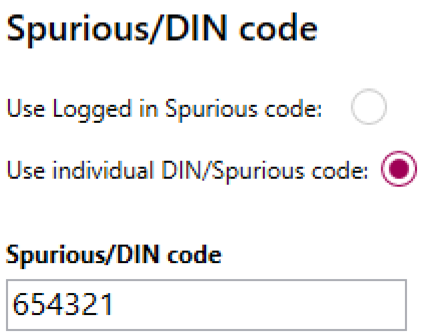
Important Note: The above process of assigning sites/department can be repeated as many times as required as users can be assigned to as many sites/departments as required.

22.1.1.4. Spurious Code

22.1.1.4.1. 6-Digit Cost Centres

If the Organisation/Site/Department type has been set as a 6-digit Cost Centre, within the Organisation/Site/Department config, wherever a prescriber will be logging in as the “Medical Prescriber” role, a Spurious code must be selected for the prescriber. Within the user profile, users can select between using the users logged in Spurious code (below left, will be the Spurious code set against the users logged in site/department), or to set a Spurious code for the individual (below right). Whichever option is selected will determine which Spurious code will be sent within the message to the Pharmacy.





Important Note: The Spurious code will ONLY be applied into the message sent to the Pharmacy if the Organisation has been set as a 6-digit Cost Centre and the user has logged in under the Medical Prescriber role (0101 Prescriber Type Code)’

If a spurious code has more than 6 digits and starts with a letter, e.g G6800577, users must remove the first letter (G) and last number in the end (7) when entering it in the field

22.1.1.4.2. 5-Digit Cost Centres

If the Organisation type has been set as a 5-digit Cost Centre within the organisation config, a Spurious/DIN code will not be sent within any prescription messages sent to a pharmacy and therefore no Spurious code will need to be set.

Unlike 6-digit Cost Centres, if a user logs in as the “Medical Prescriber” role in the application, the message will continue to include the User’s GMC number which is defined within the “Professional Code” field in the user’s profile.

22.1.1.5. Saving Changes

Once all fields have been completed within the user setup form, the profile must be saved with the “Save” button.

Users will not be able to Save the profile and will be presented with an error message if trying to save without having filled all the mandatory fields.

Once the profile has been saved, the user will be returned to the “User Management” view, where they will be able to see the newly created user.

John Smith TestUser	1234567	565060174101	Doctor	Sth Kent Coast Neuro & Ld, Folkestone (E-Pact) - Cardi	Active	

22.1.2. User Profile Amendment

Once a user has been created, it is possible to amend the user profile configuration if changes are required. To amend a user, the user must first identify the user they wish to amend within the “User Management” view.

John Smith TestUser	1234567	565060174101	Doctor	Sth Kent Coast Neuro & Ld, Folkestone (E-Pact) - Cardi	Active	

The user must then select the “Edit” button on the right-hand side of this user profile.

The user will then be taken into the configuration for the selected user profile, where they are free to configure the user as required. Please refer to the User Profile Setup section for instructions on how to configure a user profile.

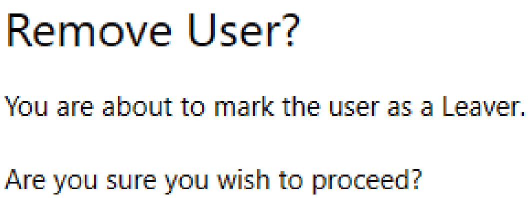
22.1.3. Disabling a User Account

If a user profile is no longer required or access to the application is to be revoked for a user, the user profile must be deactivated.

To do this, the user must login as the “UserAdmin” role and select the site whereby the user has been assigned. Once logged in, the user must then identify the user from within the “User Management” view that they wish to deactivate.

The first method of de-activating a user is to select the “Deactivate” button on the right-hand side of the user profile box.

Once selected, the user will be prompted to confirm that they wish to deactivate the user profile.



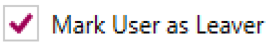
If the user is to be deactivated, the “Yes” button should be selected.

If the user wishes to cancel the action of deactivating the user, the “Cancel” button should be selected.

Once the user has been de-activated, their profile within the “User Management” view will now appear with a status of “Inactive”.

Alternatively, the user can select the “Edit” button against the user profile.

Within the profile, the user must then check the “Mark User as Leaver” checkbox.



With the checkbox checked, the user should then save the changes with the “Save” button.

Important Note: Once a user profile has been de-activated, the associated user will no longer be able to access the SOLO EPS application via any means.

22.1.4. Re-Activating a User Profile

If a user profile has been deactivated, it is possible to re-enable the profile to allow the user access to application again.

The user must firstly identify the user from within the “User Management” view that they wish to re-activate

The user must then select the “Edit” button against the user profile.

Within the profile, the user must un-check the "Mark User as Leaver" checkbox.

☐ Mark User as Leaver

With the checkbox cleared, the user profile must be saved with the "Save" button

Once the user has been re-activated, their profile within the "User Management" view will now appear with a status of "Active".

John Smith TestUser	1234567	565060174101	Doctor	Sth Kent Coast Neuro & Ld, Folkestone (E-Pact) - Cardi	Active	

22.1.5. Searching for User Profiles

Once many users have been setup, rather than scrolling through all user profiles that have been setup, the user can initiate a search to search for specific users.

To do this, the user must login as the "UserAdmin" role and select the site whereby the user has been assigned.

Please Note: If an admin user is logged in under a site that is not assigned to the users they are searching for, the users will not appear in the search

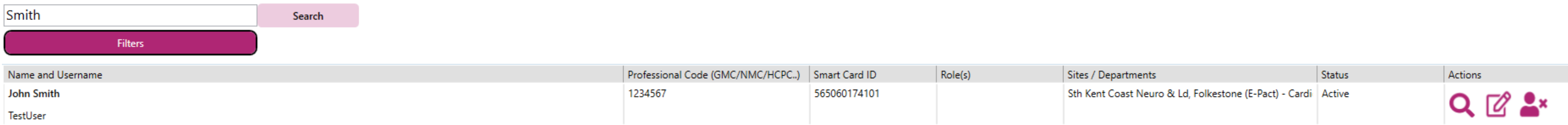
Within the "User Management" area, the user will have access to a search bar. This search bar will accept searches for the following details:

[ ] Search

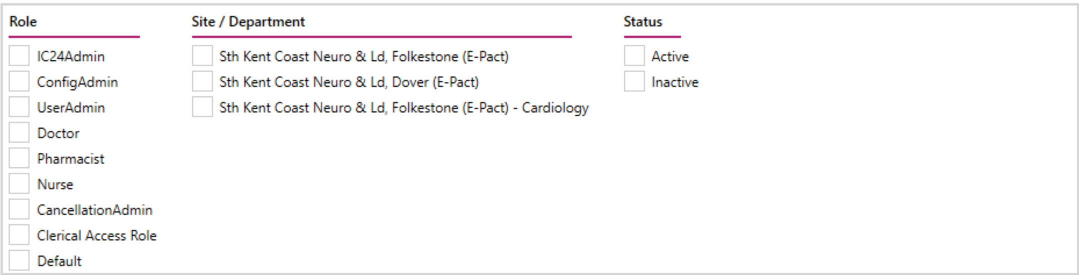
- Forename or Surname
- Username
- Professional Code
- Smartcard ID

Once the search term has been input into the field, the search can begin with the “Search” button.

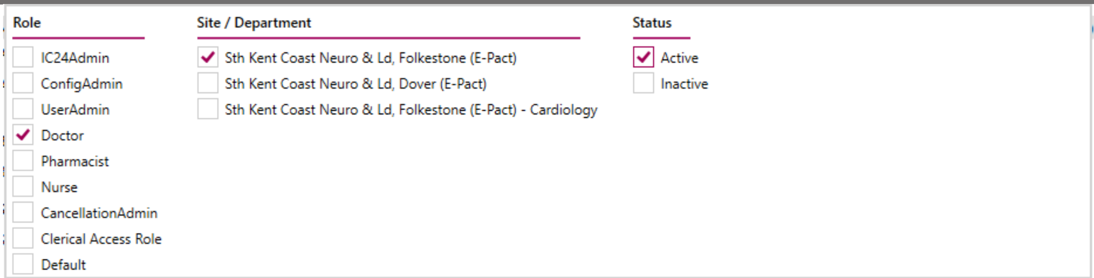
This will then return all user profiles that meet the search criteria entered.



Alternatively, the user can set various “Filters” if they do not wish to search for a specific user. To set filters, the “Filters” button should be selected.



The user must then check each filter that they wish to search by. The user is permitted to search for as many filters as they wish.



Once a filter is selected, the user profiles returned will automatically update within the view.

Wherever filters have been applied, these will be visible to the right-hand side of the “Filters” button.

If the user needs to remove a filter, they can do so by selecting the small “X” button against the filter that they wish to remove.

Once the filter has been removed, the returned profiles will automatically update within the view.

23.0. Defining Prescription details

When sending a prescription to a pharmacy, FHIR message sent to the pharmacy will contain several details pertaining to the prescription. All these details are determined by the setup of the Organisation, Site/Department and User Profiles. These details are captured from the following:

Organisation name and code

The organisation ODS code that is sent within the FHIR message will be determined by the Organisation ODS code present within the admin module.

Site/Department Name

The name of the Site or Department selected by the prescriber will be determined by the Site/Department name set within the Site/Department configuration.

Site/Department Cost code

The cost code of the Site or Department selected by the prescriber will be determined by the cost code set within the site/department configuration.

Site/Department Address

The address of the Site or Department selected by the prescriber during login will be determined by the address set within the Site/Department configuration.

Site/Department Telephone Number

The telephone number of the Site or Department selected by the prescriber during login will be determined by the telephone number set within the Site/Department configuration

Prescriber Name

The prescriber's name will be determined by the user's "Forename" and "Surname" defined within their user profile.

Prescriber Professional Code

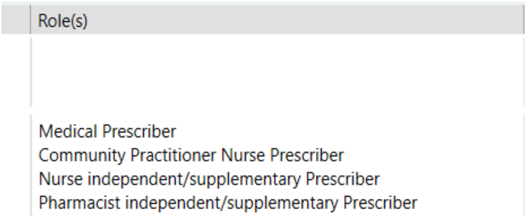
The prescriber's professional code will be determined by the "Professional Code" defined within their user profile.

Prescriber Smartcard ID

The prescriber's smartcard ID will be determined by the "Smart Card ID" defined within their user profile.

Prescriber Type Code

The prescriber type code will be determined by the role the user has logged into the application with, as defined within their user profile.



For users logging in under the “**Medical Prescriber**” role, the Prescriber Type Code will be set as: 1001 – Outpatient Community Prescriber – Medical Prescriber.

For users logging in under the “**Pharmacist independent/supplementary Prescriber**” role, the Prescriber Type Code will be set as: 1008 – Outpatient Community Prescriber – Pharmacist Independent/Supplementary Prescriber.

For users logging in under the “**Nurse independent/supplementary Prescriber**” role, the Prescriber Type Code will be set as: 1004 – Outpatient Community Prescriber – Nurse Independent/Supplementary Prescriber.

For users logging in under the “**Community Practitioner Nurse Prescriber**” role, the Prescriber Type Code will be set as: 1005 – Outpatient Community Prescriber – Community Practitioner Nurse Prescriber.

Within the 01nn Cost Centre Model (Primary Care) if users log in under a 6-Digits cost centre, these translate to:

“**Medical Prescriber**” role, the Prescriber Type Code will be set as: 0101 – Primary Care – Medical Prescriber.

“**Pharmacist independent/supplementary Prescriber**” role, the Prescriber Type Code will be set as: 0108 – Primary Care – Pharmacist Independent/Supplementary Prescriber.

“**Nurse independent/supplementary Prescriber**” role, the Prescriber Type Code will be set as: 0104 – Primary Care – Nurse Independent/Supplementary Prescriber

“**Community Practitioner Nurse Prescriber**” role, the Prescriber Type Code will be set as: 0105 – Primary Care – Community Practitioner Nurse Prescriber.

24.0 GP Connect interface data access

The GP Connect HTML interface is available to prescribers if they need to access patient’s information from their GP practice records.

In order to view data in GP Connect for the LIVE environment, customers will need to firstly agree to the National Data Sharing Arrangement (NDSA) following this link National Data Sharing Arrangement for GP Connect - NHS Digital : once the NDSA has been approved, end users can then request a dedicated ASID (if not already available for the Organisation) to the DIR team: dir@nhs.net. This will be used when sending a request to the GP Connect API in order to return data. Customers can use a single ASID for the whole organisation across all Sites and Departments.

For other organisation types, each Site may use an individual ASID, depending on the requirements and needs.