Quick notes for using the Trust System

Quick Notes for Users of the Blueteq Trust System

HiCost

Important: To request help (Including Login Requests) please send an email to our dedicated support email

Dedicated Support Email Address: trust@blueteq.co.uk

If you wish to talk to a member of the support team please include a telephone number and an ideal time to call in your email.

An online version of this manual can be found within the system under Help > Trust Manual

Contents

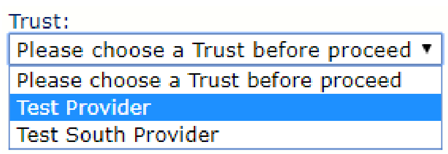
Logging into the system

To access the system,

1. Open your web browser and type in the following address:

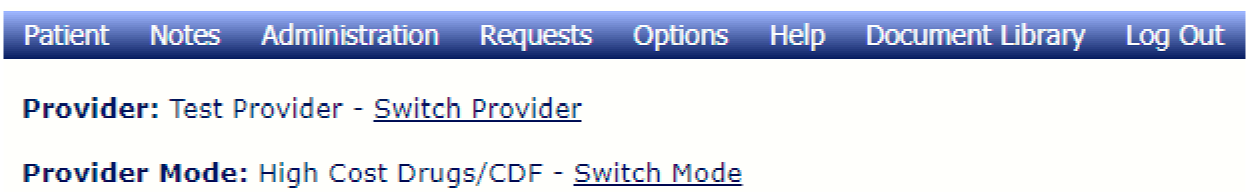
   https://www.blueteq-secure.co.uk/trust

2. Enter your username and password and click the **Login** button (Your details should have been sent to you through your NHS.net email)
3. If you are associated to more than one Trust then you will need to choose which Trust that you are working from in the top left corner dropdown box

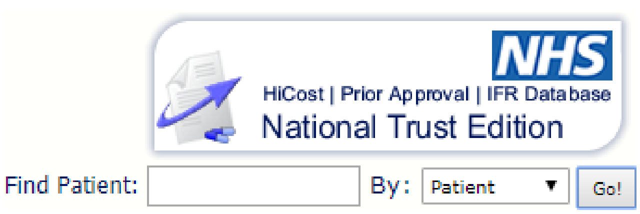


4. The system will appear, showing the default start page.

In the upper left hand corner of the webpage is a Menu bar and the trust name that you are logged in on. In the the screenshot, the user is logged in under a test provider for HiCost.



To the right is the search patient function for the system.



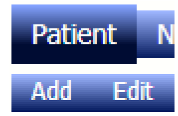
To find and select a patient, you must use the 'Find Patient' search box in the upper right hand corner of the web page. Within this search box you are able to search through different parameters such as,

- Surname
- DoB
- NHS Number

You can also search via Hospital Number, Request ID and Blueteq ID from the 'By' dropdown box.

Patient

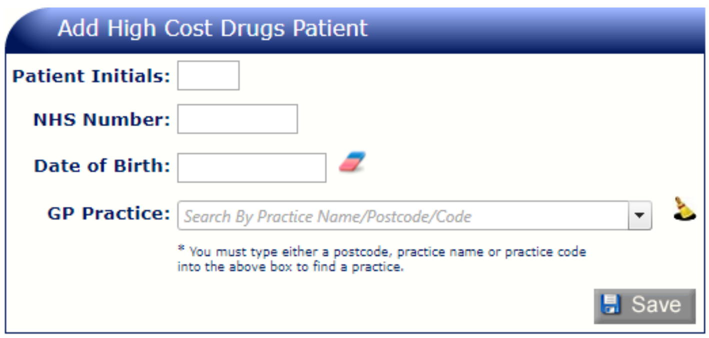
The first button on the menu bar is the **Patient** button. This button allows for the addition and editing and of all patients within the trust system.



Adding patient's details onto database

By navigating to **Patient** > **Add**, you are taken to the 'Add Patient' page. Using this page you can easily add new patients to the system by filling in the required fields and then clicking **Save.** The patient's details should now be added to the database and will be able to be found through the search function.

- When entering the Practice, start typing the postcode of the practice. The user will be presented with a drop down menu. This menu contains all GP Practices in the local area of the postcode.



NOTE: *If the user finds that a practice has not been added to the system and they are confident that the practice belongs within the catchment area of the CCG then please send the full GP details to the support address listed.*

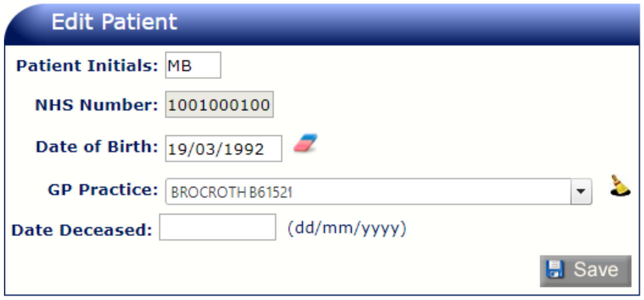
Searching and Editing patient details

As explained previously, a search function is available to find specific patients. In the following instance, a search for a patient with the name 'bean' has been submitted and this bought back any patients with this name, in this case just one patient was returned.

Note: If a list of patients is found, select the required patient using the **Go!** button. This will bring up the Patient Notes page and set this patient as the current patient until another patient is selected or you log out.

(The data in this screenshot is for a test patient)

Once they have been selected, you can edit a patient by navigating to the edit page via the top menu (**Patient** > **Edit**). This will bring up the edit patient page. On this page you can edit any of the patient details apart from the NHS Number. In the event that the NHS Number needs to be edited for any reason, contact Blueteq using the support email on the front cover of this manual.



After changing the patient details, click on **save**. This will append the patient data within the system.

The searching and editing patient details function can be reduced to a few simple steps.

1. Find the patient using the **Patient Search box**
2. Choose the relevant **Patient**
3. Navigate to the **Edit Patient** Menu option
4. Make your changes and click on **Save.**

Note: Make sure to double check all patient details before editing and saving. This will help prevent problems in the future.

Uploading a request

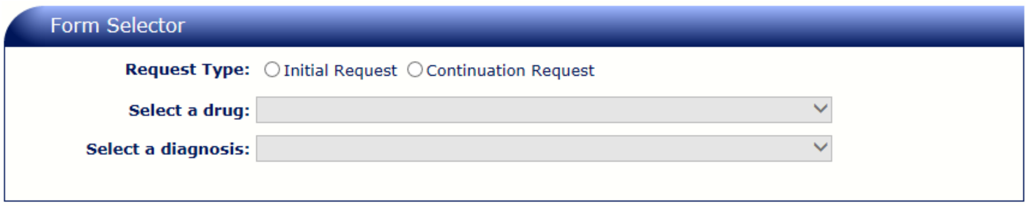
Adding a request can be done in one of two ways:

1. Click on **Requests** and **Upload** menu options. This will take you to the **Add Patient** screen (described above). Once you have saved the patient's details it will take you to the *Referral Details* screen.
2. From a Patient's notes, click on the **Add Request** button. This will skip the first methods patient creation screen and go straight to confirming the patient's practice

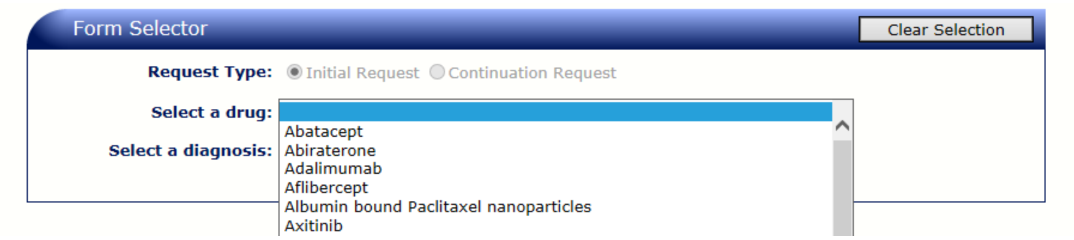
Adding a request

1. Click on the **Requests** button on the main menu, this brings up the add patient page
2. Enter the patient's details (To find a GP practice, enter the practice's postal code into the GP box)
3. If the patient already exists, you will be offered a choice of selecting an existing patient or creating a new one
4. Click on **Save**
5. On the next page, you will be shown the currently registered practice for the patient. This will be the GP practice that was set when creating the patient. Click **Next**

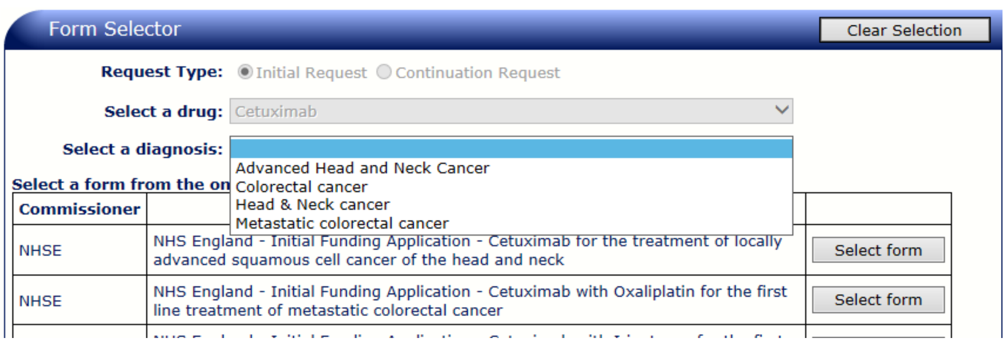
6. You will be asked to select a Request Type (Initial or Continuation)



7. Once selected, choose a drug from the drop down list. A list of forms will appear below the selection criteria



8. If the list of forms is long, you can also filter it by additionally selecting a diagnosis.



9. Click on the **Select Form** button of the form you need. Note that the "Commissioner" column tells you the source of the form and can be either "NHSE" or "CDF" or "CCG".

10. Fill in the form with all details (If the form is incomplete and you wish to save it, check the 'Incomplete' checkbox next to the **Save** button at the bottom of the form. Then click **Save**

11. If you have fully completed the form and wish to submit it, click on the **Submit** button

Note: *If your account is set to a 'trust user', you will not be able to submit requests. Instead you will have to save the requests which present them as pending and ask a 'trust authorisee' to submit the form on your behalf.*

Example Form

Below is an example form which shows the wide variety of question options available as well and explanation of the different areas of a form.

Note: *The example form is just an example of how a form may look like. Depending on the type of form and commissioner, the forms can change in their appearance. However, all forms follow the same functionality and processes.*

Example Form

FUNDING APPLICATION FOR	
Drug	Please select a drug ▼
Condition	Diagnosis
Funding request	Initiation / Continuation
Treatment Start date	

PATIENT & GP DETAIL			
Patient Initials:		Patient age:	
Patient NHS Number:		Practice Postcode:	
Patient Hospital No:		GP Practice Code:	
CCG:			

CONSULTANT & TRUST DETAILS			
Consultant Name:	*		
Choose Prescriber:	▼		
Prescriber Name:	*	Prescriber Role:	Consultant ▼
Notification Email Address:	*	(@NHS.net or @NHS.uk account ONLY)	
Contact Telephone Number:	*		

FUNDING CRITERIA

This section outlines any standard criteria information that the commissioner wishes the user know. This can also tell the user what to do if the patient does not meet criteria.

Please indicate whether patient meets the following NICE criteria:	Please complete/tick
1. Is the drug suitable for the patient?	Yes No * Required
2. There is confirmation of sustained disease. Please state scores for the following: The Disease Index (must be at least 5.1) Baseline Score * — Date *	Yes No * Required
4. I confirm that ONE of the following applies to this patient. Patient has had previous failed trials Patient is unable to tolerate other drugs * Required Fill in table below for all treatments administered Start Date — Stop Date — Treatment dose and frequency — Reason for Stopping	
5. Please confirm that when using the BASDAI and spinal pain VAS scores, the patient's disabilities, such as physical, sensory or learning disabilities, or communication difficulties, in reaching conclusions on the severity of ankylosing spondylitis has been taken into account	Yes No * Required
6. Select drug brand and dose to be used Brand 1 - 25mg twice a month Brand 1 - 10mg once a week Brand 2 - 25mg Once a month * Required State reason for choosing the selected brand:	
7. Please confirm that the patient understands and has consented to the treatment This has been documented in the patients notes	Yes No * Required

APPROVAL FOR SUBMISSION FOR FUNDING BY TRUST	
Form completed by Name	Date

Incomplete | Save | Print | Email | Submit | Back

Form sections

A is split up into three separate sections.

- Top of form - Where you will find the patient and clinician / consultant details as well as other standard form information, such as 'Procedure Criteria'.
- Treatment Criteria – The criteria the patient needs to meet in order to receive treatment
- The declaration and option buttons – The submitting user and date of form completion. This section can also include an additional information segment if required.

Top of form

The top of form is set standard part of all forms from the commissioner. Simply fill out the required patient and clinician data.

Funding Application For

This section outlines what drug and diagnosis the form is for, as well as identifying the type of form.

Applicant / Clinician / Consultant Details

When adding clinician / consultant details, you will have a drop down box next to the 'Clinician Making Request' section. This drop down is a self-learning box and will include any clinician that a form has previously been made for.

Example Form			
FUNDING APPLICATION FOR			
Drug		Please select a drug ▼	
Condition		Diagnosis	
Funding request		Initiation / Continuation	
Treatment Start date			
PATIENT & GP DETAIL			
Patient Initials:		Patient age:	
Patient NHS Number:		Practice Postcode:	
Patient Hospital No:		GP Practice Code:	
CCG:			
CONSULTANT & TRUST DETAILS			
Consultant Name:	*		
Choose Prescriber:	▼		
Prescriber Name:	*	Prescriber Role:	Consultant ▼
Notification Email Address:	*	(@NHS.net or @NHS.uk account ONLY)	
Contact Telephone Number:	*		
FUNDING CRITERIA			
This section outlines any standard criteria information that the commissioner wishes the user know. This can also tell the user what to do if the patient does not meet criteria.			

If the clinician / consultant that you are looking for is not present in this drop down list, you will need to select the **'Not Listed'.** This will unlock the clinician detail text boxes, where you will be able to input a new clinician. Once the form has been saved or submitted, the clinician will be available in the drop down list.

Patient Details

The patient details sections will normally be pre-filled with existing patient data available on the system. If extra information is needed, you will be able to enter it into text boxes.

Treatment Criteria

The criteria section outlines different criteria that the patient needs to meet. This criteria is either based on NICE criteria or local policies, (The form will state whether it is a NICE or local policy form).

The questions in this section can be presented as, but not limited to,

- Standard Yes / No questions
- Textboxes for text based inputs (commonly used for test scores and dates)
- Checkboxes and radio buttons for pre-defined selection options

Please indicate whether patient meets the following NICE criteria:	Please complete/tick
1. Is the drug suitable for the patient?	Yes No * Required
2. There is confirmation of sustained disease. Please state scores for the following: The Disease Index (must be at least 5.1) Baseline Score * Date *	Yes No * Required
4. I confirm that ONE of the following applies to this patient. Patient has had previous failed trials Patient is unable to tolerate other drugs * Required Fill in table below for all treatments administered Start Date | Stop Date | Treatment dose and frequency | Reason for Stopping	

- Tables to fill in

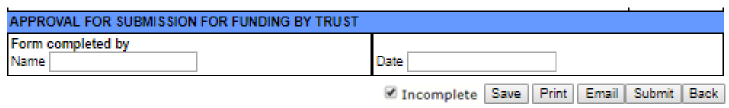
You should fill in this section, answering all questions to the best of your ability, making sure that all information given is accurate. If you fail to fill in a required question, or your answer does not meet the criteria, the form will show you a warning and not allow submission to take place.

Note: *If you notice something is wrong on a form, or have any questions in regards to the criteria outlined, you will need to contact the form's commissioner.*

The declaration and option buttons

At the bottom of the form, you may see a declaration section which will state who the user that completed the form is and the date of completion. This section is pre-filled with the details of the user who first created the form. You can however change the text in the boxes if you need to do so (change the date for instance)

Other sections may appear after the form criteria too, such as additional information boxes. Additional boxes will normally be explained in the forms that they appear in.



Below the declaration, there will be a set of buttons. These buttons allow the user to do a variety of things with the form.

- Save – Saves the form and takes you back to the patient's notes screen.
- Print – Allows the form to be printed out
- Email – Allows the user to email the form
- Submit – Submits the form to the commissioner
- Back – Takes the user back to the patients notes screen

Selecting continuation forms

When an initial request is up for review (please see Follow up list or review list below for details on follow up patients), a continuation may need to be submitted to continue funding, a continuation request is added in an almost identical way to adding an initial request (shown above), except in this case, instead of clicking the radio button for Initial Request you click **Continuation Request**

A new drop down list will appear called 'Select a previous request'. This drop down list will display all previous initial requests for this patient with the relevant ID, Date Drug and Diagnosis displayed.

By picking the initial request, it acts as a filter for the forms and the appropriate continuation form will be visible for selection, similar to the initial request, Click on the **Select Form** button next to the form and then complete it, submitting it once finished or saving it as pending.

Should no requests appear in the drop down list, then you can select a drug and diagnosis using the drop down lists. (Subject to CCG restrictions)

Note: *By linking your continuation request with the initial request, the system will automatically, change the status of the initial request from 'follow up' to treatment complete.*

Submitting a 'pending' request form (For Authorisees)

If you are a 'Trust Authorisee', you may have the additional responsibility of checking and submitting patient request forms saved by system users. This is a simple task to complete and through doing so, you are able to double check request forms for accuracy before being submitted.

1. Login to the Trust System like normal
2. Navigate to **Administration > Request History** (The request history is explained in detail later on)
3. Use the **Status** dropdown list to select 'Pending', this will filter the request history list to pending
4. If you are searching for specific requests (on certain dates, for certain interventions or from certain consultants), use the request history's other search functions to filter the request list further
5. Once a request has been found and chosen, click on **Notes** to the right hand side of the request. This will bring up the Patient Notes.
6. In the Patient Notes, find the entry marked as 'On-line Referral Pending' and click on the Edit Icon
7. Check that the form has been fully filled out and all information is relevant and accurate
8. Click on **Submit**

Alternatively, if you are looking for a specific patient's pending request, you can search for the patient through the search function in the top right. Once you have found the patient, follow from step 6.

Notes (Patient Notes)

The patient notes page displays all data relevant to the currently selected patient. You will notice on the top of the Patient Notes page there is a set of options above the main notes.

Using these options, you can perform various tasks to do with the current patient. These options include,

- **Add Request –** This button performs the a request process which is outlined in the previous section
- **Comment –** Adds a comment to the Notes Page for the patient. Clicking **Comment** shows the comment page

  - The **Send to Admin** checkbox will make the comment appear in the *Messages for Admin* list within the commissioner system)

- **Upload Docs –** Scanned documents can be uploaded onto the database by clicking the **Upload Docs** option.

  - Select the Associated Request
  - Click on **Choose File** and select the relevant file from either a local folder on your computer, or a shared folder

- Type in a description of the file within the 'Description' text box
- Tick the **Send message to Admin** checkbox to alert admin of the upload

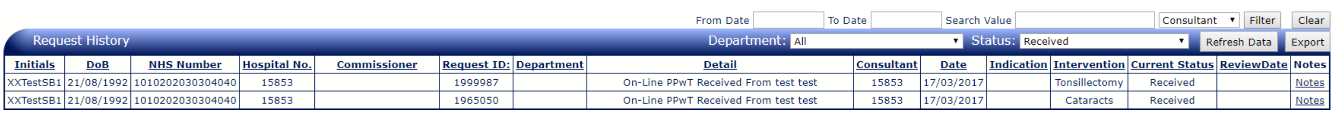
- **End of Treatment –** This option is used to end a line of treatment, clicking on that option opens a new window where you can highlight the request you want to cancel the date and the reasons for end of treatment there is an additional comments boxes which can also be used. Click the Confirm End of Treatment button to stop the treatment.

Administration

Administrative tasks can be found under the **Administration** button. The following section details what each sub-button does.

Request History

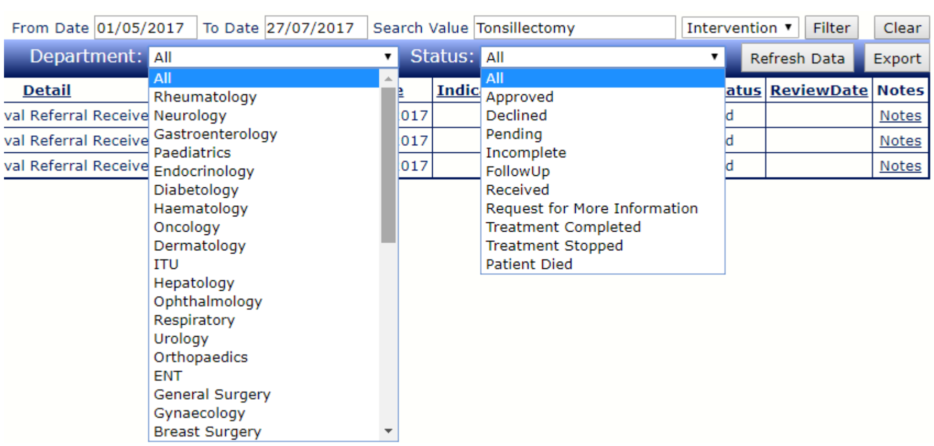
To view the request history for your Trust, (including a request's current status), click on the **Administration > Request History**. By default you will be shown the "Received" requests but you can change this by choosing ''All'' or ''Pending'' from the Status dropdown list to the upper right of the report.



Initials	DoB	NHS Number	Hospital No.	Commissioner	Request ID:	Department	Detail	Consultant	Date	Indication	Intervention	Current Status	ReviewDate	Notes
XXTestSB1	21/08/1992	1010202030304040	15853		1999987		On-Line PPwT Received From test test	15853	17/03/2017		Tonsillectomy	Received		Notes
XXTestSB1	21/08/1992	1010202030304040	15853		1965050		On-Line PPwT Received From test test	15853	17/03/2017		Cataracts	Received		Notes

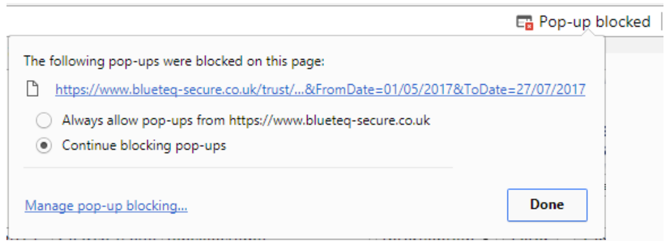
The request history is a very useful and functional tool for users of the trust system. It enables a user to create their own custom report based on the columns present within the Request History. To create these custom reports, the user is supplied with various filter dropdowns and text boxes. The user can stack each filter value together. For instance, the user can select to filter all requests between certain dates, where the intervention type was Tonsillectomy that were declined. This collection of filter values will produce a custom request history view (report).

An example of the filters in use is below.



After filtering the Request History, if desired, the user can export the filtered data into an excel spreadsheet which reflects the same view. To do this, click on the **Export** button. This will open up a new window showing the Request History as a report. Within this window, on the upper left, the user can choose to **Export to Excel** or **Export to CSV**.

Note: *You may need to allow Pop-ups on the webpage for the export button to open up the export report window.*



Remember, the request history is more than just a simple historic view for requests. It is essentially a custom report maker for common reports that can be created quickly and easily.

Messages for Admin

Messages for admin page is located under **Administration > Messages to Admin**

The Messages to Admin page lists all of the comments made by users that have been marked as 'Sent to Admin' but haven't been dealt with. The page will show all admin messages for patients that are connected to the current trust that you are logged in to.

Messages for Admin to be Actioned — All

Date Recd	Patient Initials	DoB	Message	Department	Consultant	Done	Notes
26/07/2017	XXSB7	21/08/1992	Can this be looked at	NO Department	Test Clinician		

- Once and admin has read a message and has auctioned the message, the message can be deleted by clicking the icon in the 'Done' column on the right hand side of the task.
- To go to the patients notes, click on the icon in the Notes column.

Follow Up List

The follow up list page produces a list of all patients that are requiring a follow up or review for current Trust. It is accessed via **Administration > Follow Up List.**

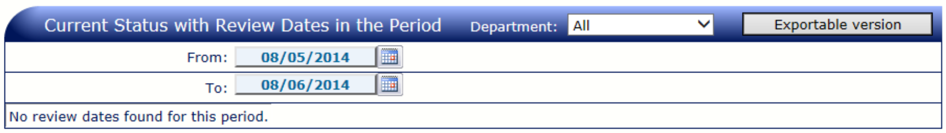
- You can access the Notes directly from this list by clicking on the "Notes" link within the Notes column
- The list can also be exported to Excel by clicking on the **Exportable version** button. This produces a report which can be then be saved onto a local drive or network

All Patients that have a Follow Up Status — Exportable version — Department: All

Initials	DoB	NHS Number	Hosp Number	Intervention	Department	Consultant	Notes

Review List

The review list page is similar to the follow up list page. It is found under **Administration > Review list.** This page presents a list of patients with a request that has a review data between a set date parameter.



- To alter the date criteria click on the next to the date that you want to change and a calendar will appear for you to select the desired date.
- To sort the list click on the any of the column headers that has an underline.
- To go to the patients note click on the 'Notes' link in the Notes column.

Reports

The reporting tool for the database can be accessed by clicking on **Administration > Reports.** This takes you to the 'Reports Main Menu', where you'll be able to create and run reports based on a desired date period and CCG.

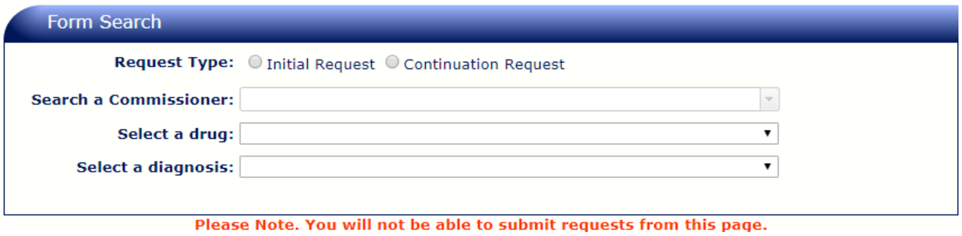
Creating a report is very simple using this menu.

1. Set a 'From' and 'To' date
2. Choose the desired CCG
3. Click on **Run**

This will bring up a new browser window showing your report. From this window you can export the report into Excel or CSV format.

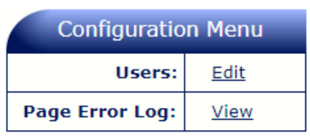
Form Check

The Form checker located at **Administration > Form Check** is a simple tool to check which forms are available on the system. As can be seen on the screenshot, there is a red warning message underneath stating that this page can only search for forms and does not allow a form to be created,



Configuration Menu

The configuration menu allows a user to access and configure many aspects of the system. These aspects are shown in the screenshot below. To access the Configuration Menu, navigate to **Options > Configuration**.



Depending whether you have been given 'SuperUser' rights or not determines what you will find on the configuration menu. The screenshot above is for a standard trust user. This menu gives access to two options, Users and Page Error Log.

Users without 'Super User' rights

Users without 'Super User' rights are not able to add new users and are only able to edit their own profiles. User are able to change their,

- Full Name
- Job Title
- Personal Email
- Password & Reset required checkbox

Decriptions of these points are found below.

Users with 'Super User' rights

For users with Super User rights, all user addition and editing options are available.

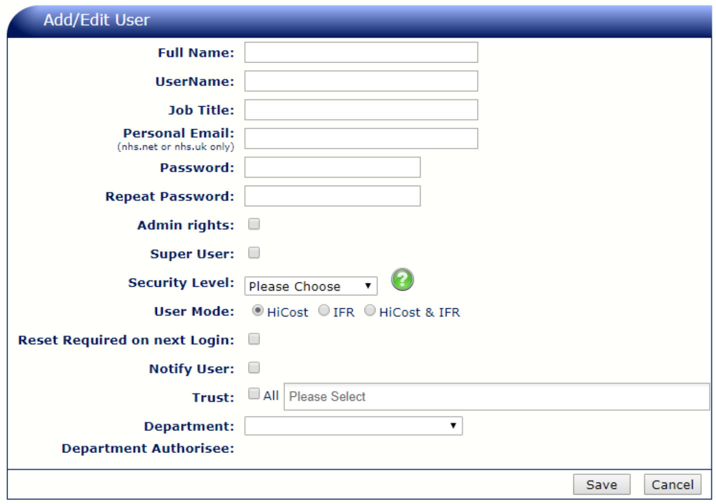
Clicking the **Add** button will bring up a blank Add/Edit User page. You can then simply add in the relevant details of the user that you wish to add and click **Save**.

Full Name - Full Name of the user

UserName - This is what they will use to login with. It may be a good idea to use the same as their system user name here.

Job Title – This will appear on the bottom of some letters.

Password - Minimum of 7 characters.



Email address - This should be an nhs.net address as patient identifiable info may be sent to it.

Admin Rights - Allows access to the Configuration Menu.

SuperUser - Allows the user to add, unlock, edit and delete any user.

Security Level - Set this to *User*. This function may well be used to introduce further security levels in the future if required.

User Mode – Set this option to what the applicant is wanting access to.

Reset Required on next Login - This will force the user to change the password the next time they login.

Notify User – If this option is checked, the user will receive an email with their login details attached once the Add User request has been complete.

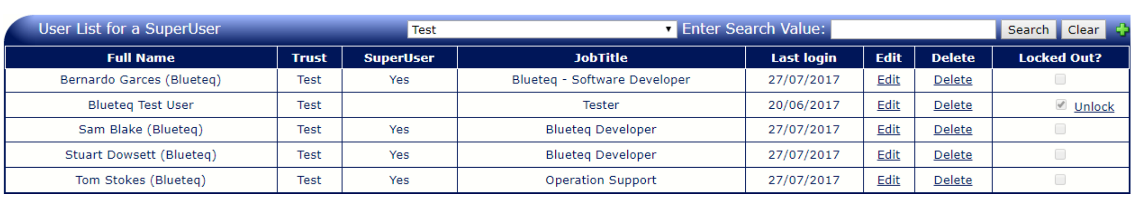
Trust – By typing the name of a trust into the 'Please Select' box, a filtered dropdown list will appear, by selecting a trust from this dropdown, it will be added to the trusts section. Additional trusts can be added in the same way, by clicking on the box.

Department – This option is to select a department that the user will be working in. This can be left blank if the user works in multiple departments.

Department Authorisee - If the user has a security level of 'Trust Authorisee', this section will allow ability to choose which department the user is authorisee to.

Editing Users

To edit a user, click on the **Edit** button on the configuration menu. This will bring up a list of users on the system for the trusts connected to your account. From this list you are able to Edit, Delete or unlock locked accounts.


User List for a SuperUser | Test | Enter Search Value: | Search | Clear

Full Name	Trust	SuperUser	JobTitle	Last login	Edit	Delete	Locked Out?
Bernardo Garces (Blueteq)	Test	Yes	Blueteq - Software Developer	27/07/2017	Edit	Delete	
Blueteq Test User	Test		Tester	20/06/2017	Edit	Delete	Unlock
Sam Blake (Blueteq)	Test	Yes	Blueteq Developer	27/07/2017	Edit	Delete	
Stuart Dowsett (Blueteq)	Test	Yes	Blueteq Developer	27/07/2017	Edit	Delete	
Tom Stokes (Blueteq)	Test	Yes	Operation Support	27/07/2017	Edit	Delete	

To edit a user, find someone that you'd like to edit and click on **Edit**. This will take you to the same page as adding a user, just with all user information already filled in. On this page, you can edit nearly anything apart from the User Name of the user. This is the only set value. Once finishing the edit, click **Save** to commit the changes.

If a user has been locked out of the system, it normally is from one of two reasons.

- Inactivity for a period of over 6 months
- The wrong account password was entered too many times

To unlock a user account and make it functional again, click on the **Unlock** button on the right hand side. (As seen in the above screenshot)

Finally, to delete a user, simply click on the **Delete** button. This will delete them from the trust system.

Be aware! *Take care when deleting users as they may be associated with several trusts. It may be more practical to remove them from a desired CCG than to delete them entirely.*