POSITIVE
SOLUTIONS

Analyst Version 3.46

Analyst PMR – Scottish Features

January 2011

An extract of the full Analyst manual containing:

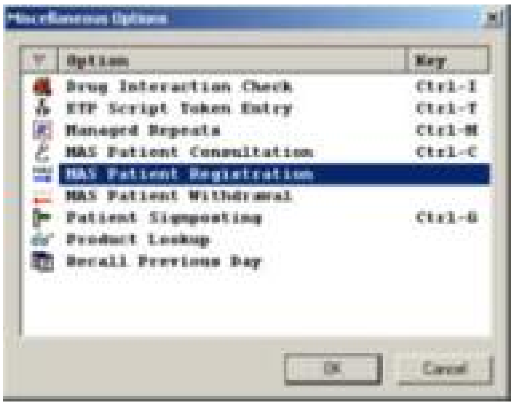
eMAS
AMS
CMS

Table Of Contents

Minor Ailment Service (eMAS)

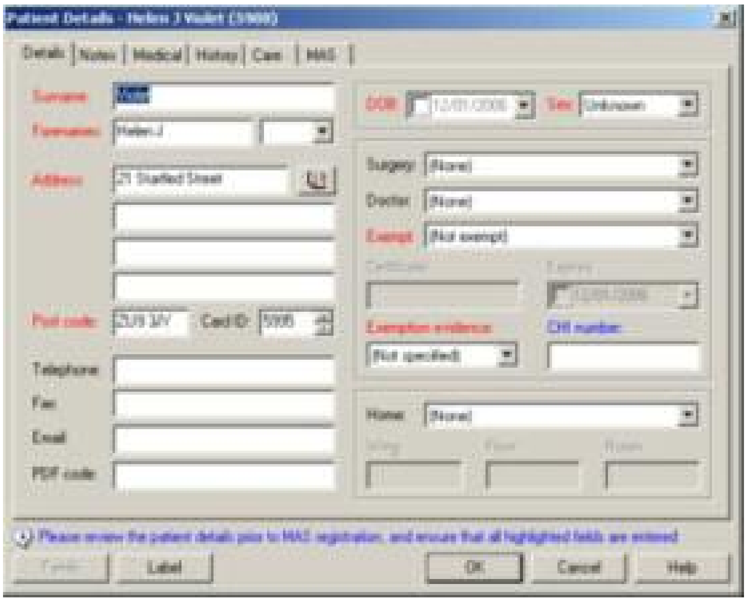
Registering Patients

Before performing a consultation with a patient under the MAS service they must be registered to your pharmacy. To do this click the **Misc** button from the Script Queue screen and select the **MAS Patient Registration** option.



Now search for the patient to add to the MAS. If they are not already on your system then they can be added by clicking the **New** button. Type in their name here with their surname first. Press enter to search for them on the system.

If they are in the results list, select them and click **OK**. If there is not match on your system click the **Create** button to add a new record for them.



Complete the record as fully as possible. All the fields with red titles are compulsory. The CHI number which is the unique medical number for the patient may not be known at this stage, but enter it if it is. The address can be entered quickly if you have the Post Office Address Finder plug-in (shown by the button next to the first line of the address) by entering the house and postcode.

Click **OK** when you have filled in as much as information as possible.

A CP2 will print out with the registration details. These should be batched up ready to send to the PSD.

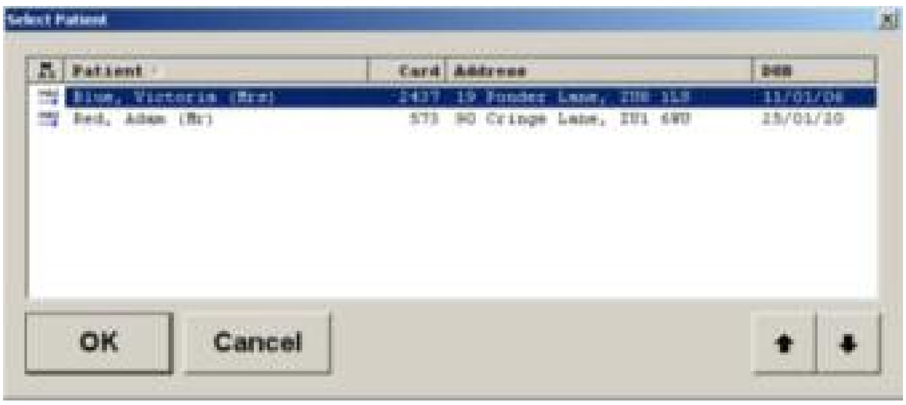
Meanwhile an electronic registration request is sent to the e-Pharmacy Store. At this stage the patient's registration is 'Pending'. You can still perform consultations though at this stage, but the CP2 form or electronic claim for the consultation cannot be submitted until the patient becomes 'Registered' and the CHI number is known. Your paperwork should be kept until the CHI number is assigned. Analyst stores incomplete claims in the Pending MAS Claims section off the Admin Menu of Analyst PMR.

Conducting a MAS Consultation in Scotland

A MAS consultation can only be invoked from the Script Queue screen either by selecting **Misc** then clicking the **MAS Patient Consultation** option or by pressing **CTRL+C** on the keyboard.

The patient search dialogue will appear to identify the patient for the consultation. If an error appears at this stage it is probably because a responsible pharmacist cannot be identified.

Search for the patient in the usual way with this dialogue.

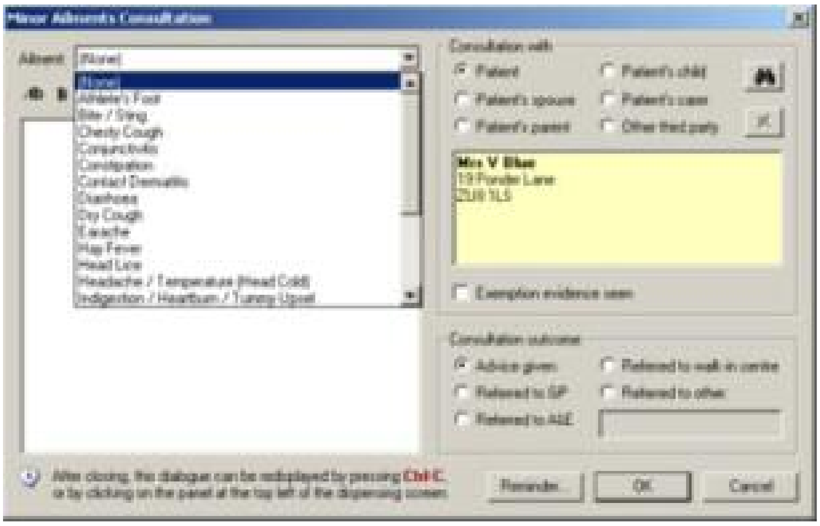


The results will only display patients who are registered for the Minor Ailments service. If the patient you are dealing with does not appear then they need to be registered first. If the patient appears in the list select then and click **OK**.

Alternately, if the patient is already a member of the scheme and has been searched for as normal or has their patient barcode scanned a window can appear to ask if a MAS consultation should be conducted instead of a normal dispensing session. This option will need to be turned on the MAS Tab of the System Configuration by selecting the 'Suggest MAS consultation when selecting MAS-registered patient'.

Select **Yes** to start a MAS consultation or **No** to start a normal dispensing session. Select the 'Don't show this again' box to disable the option in the system configuration.

The MAS Consultation screen will then appear.



In the top left identify the ailment the patient is suffering from. If more than one ailment is applicable then select the most severe. Type in the text box below the details of the condition, symptoms and the course of treatment or nature of advice given. This can be completed later if necessary. In the top right confirm who the consultation is being held with. If it is not the patient who has already been identified, select the appropriate options and use the binoculars button to search for the who the consultation is with. It is a requirement of the MAS that their contact details are stored in the PMR so if they are not already in Analyst they must be added, though they need not be registered for the MAS themselves.

If known at this stage, mark the outcome at the bottom right, though there will be another opportunity before the session ends. Click **OK** to move to the dispensing screen.

Dispensing Medication as part of the MAS

Once the details have been input into the consultation screen items can be dispensed to the patient if appropriate for their condition. Click the **Drug** button to select the item you wish to dispense to them. This list is usually limited to the MAS Formulary so will not show the full range of medication in your dispensary. Under normal circumstances these items can be identified with the 'MAS' icon in the left but whilst dispensing as part of a consultation only these items are displayed. Select the appropriate item and complete the drug quantity and dose information screens as normal. The settings of the search restrictions and whether dispense is just limited to formulary items are held in the MAS Tab of the PMR system configuration.

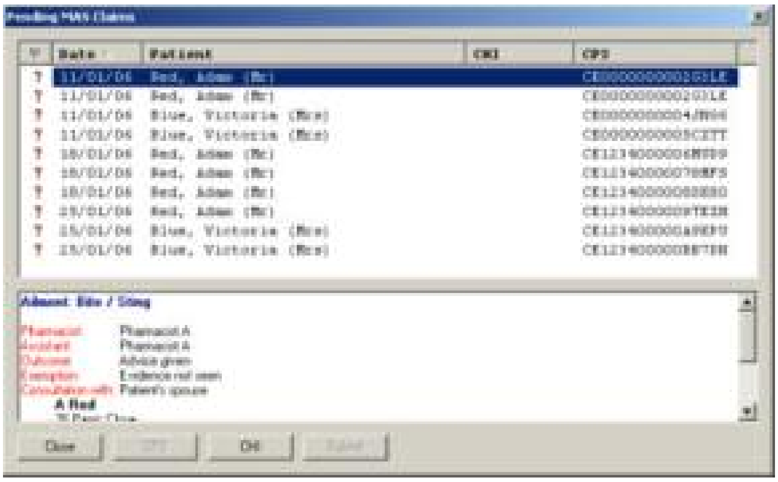
Closing the Consultation

Once the patient has ben counselled and had any medication dispensed click the **End** button. The Consultation dialogue re-appears to confirm the details which have been entered. Any changes or additions to the detail should be added at this stage. Click the **OK** button to complete the consultation. A CP2 is now printed detailing the outcome of the session and should be stored for submission. If the patient's CHI number is not known at this stage a warning will appear to store the CP2 for completion before submission. The script is also automatically endorsed on the right hand column of the CP2 with the pack size and manufacturer of the dispensed item.

Pending MAS Claims

A claim for a completed consultation cannot be sent to the e-Pharmacy Store until the CHI number of the patient is known. This will only happen for patients who have registered and had their first consultation at the same time. The CHI is issued from the e-Pharmacy Store which the registration of the patient has been successfully processed which can take up to eight hours. Until then the outstanding claims are stored under the Admin menu of Analyst PMR.

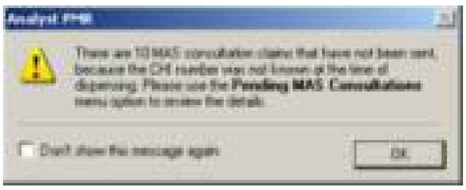
Once selected the pending claim list is displayed in a new window.



Once the CHI number has been received from the e-Pharmacy Store the field is filled in on this screen. It is not automatically submitted as the CHI number also needs to be printed on the CP2 before that can be submitted. This can be hand written or printed by placing the form in the manual feed tray and clicking the **CHI** button. Only the CHI number is printed in this pass. Once the CP2 has been completed by either method the claim can be submitted by highlighting the entry and clicking the **Submit** button.

Pop-up Reminder

At start-up and periodically thereafter a pop-up warning will appear to remind you that there outstanding claims to be reviewed.

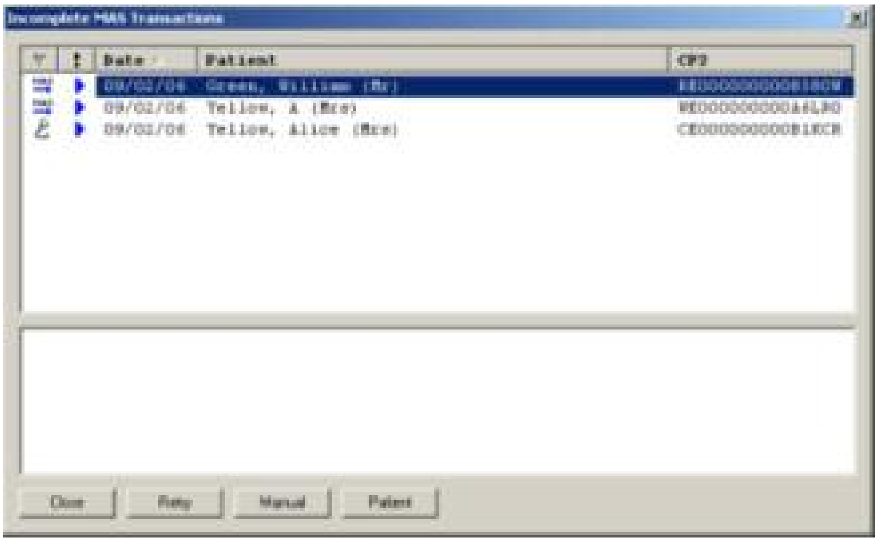


Click **OK** to dismiss the reminder or place a tick in the "Don't show this message again" box and click **OK** to dismiss the box and prevent further warnings appearing. The warning can be re-instated by selecting the "Periodically warn of there outstanding claims" option in the MAS Tab of the PMR system Configuration.

Incomplete MAS Transactions

Periodically there may be communication problems between your pharmacy and the e-Pharmacy Store, or problems at the e-Pharmacy Store itself. Each message requires a response to confirm receipt and to provide Analyst with more information such as CHI numbers and registration updates. There is a specific amount of time that Analyst will wait for these responses and after that time has expired the failed messages are placed in a section for you to review and resend.

They can be found by selecting **Admin** and **Incomplete MAS Transactions** from Analyst PMR.



The columns in the top pane indicate what sort message has not received a response, if it has been resolved or not, the patient concerned and the CP2 number. The bottom pane displays the details of a consultation if highlighted.

Highlight a line in the list, or multi-select a number of lines and click **Retry** to resend the message to the e-Pharmacy Store, click **Manual** to mark the line as manually completed (by filling in the paperwork yourself) or **Patient** to expand into the patient's details.

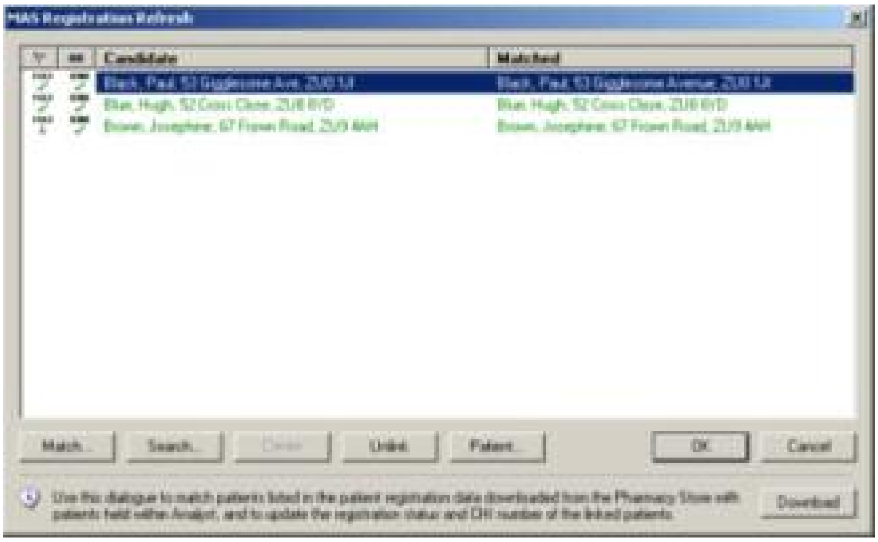
The icons found in the columns are explained below.

	Incomplete patient registration
	Incomplete patient withdrawal
	Incomplete consultation
	Incomplete registration status query
	Incomplete consultation cancellation
	Response pending
	Response deferred
	Consultation accepted but awaiting registration roll-on status
	Message response timed out
	Message response delay still within limits (usually around 4 hours)

MAS Registration Refresh

In rare occasion, the registration status of patient's in Analyst can fall out of synch with the record held on the e-Pharmacy store.

Click The **Download** button to contact the Store and download a full list of all registered patients to your system. Analyst's list of registered patients will be cleared and the downloaded list will be applied. This will effectively re-synchronise your Analyst system with the Store.



Your screen will be full of information. This system only has 3 patients!

The column on the left displays the patient's registration status on the Store. The second column of icons displays the linked status of the Store's record to one in Analyst. The 'Candidate' column displays the Store' record and the 'Matched' column shows the corresponding Analyst record it is matched to, if any.

Cautions

This download procedure must be performed on the master, can take up to 30 minutes to perform and master terminal cannot be used for selling or dispensing while the download is in progress. Other terminals on the system an be used as normal, but any internet activity might be slowed by the download from the Store.

Any MAS registrations which have not been confirmed by the store will not be included in the download and will have their 'pending' status removed from Analyst. Consequently you will need to check the registration status of patients who recently joined the scheme and re-register them if they are not enrolled on your system.

Linking and Unlinking Patients

Analyst will try and link the patients sent in the list from the Store to patients in your system. In the vast majority of cases this will work without a problem, but there might be the odd patient who is not matched. The reason for this can be determined by the icon next to them with reference to the list below. Use the **Match** button to confirm a link, the **Search** button to look for other candidates in your system to match the Store's record, the **Create** to make a new patient record based on the Store's data, **Unlink** to sever the link between a Store's record and Analyst's match and **Patient** to open the Analyst patient record.

Icons

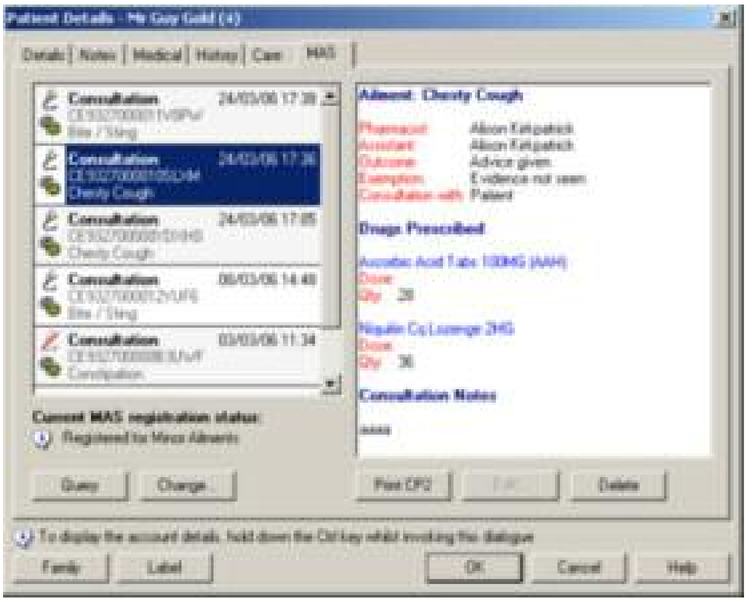
There are a number of icons in the two columns on the left which explain the status of each patient.

	This patient is currently registered at this pharmacy.
	This patient's registration has lapsed.
	The registration status of this patient is unrecognised. An error has occurred.
	This patient was matched by their CHI number.
	There is no match in Analyst for the record found on the Store. Use the Search button to find a match.
	A match on the CHI was found but the surname of the patient is different.
	There was no match on CHI, but a unique match has been made on their surname, date of birth and post code. The CHI number will be added to the record.
	The record on the store has more than one possible match in Analyst. Use the search button to identify the correct patient.
	More than one record on the store matches a single record on Analyst. Use the search button to identify the correct patient.
	No match was found in Analyst. The patient record will be created from the details retrieved from the Store.
	This patient has been manually matched using the search button.

Changing a Patient's Registration Status

The MAS registration status of patients will be generally maintained automatically. By using the MAS Patient Registration and MAS Patient Withdrawal options under the Misc button of the Script Queue screen patients are added and removed from the service. If a registered patient does not receive a consultation in 12 months their registration 'lapses' which means they remain registered but you cannot claim any payment for treating them. Lapsed patients who re-attend become 'un-lapsed' and they can again be claimed for.

Periodically you may need to check or change the patient's registration status manually. This can be done through the MAS tab of the patient editor. Load the patient in question into the editor and click on the MAS tab.



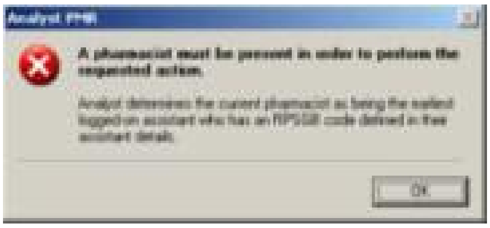
Their registration status is displayed at the bottom left. The e-Pharmacy Store can be contacted to query their current status by clicking the **Query** button. A spinning egg timer icon displays whilst the check is performed and this can take several minutes, but the editor can be closed and normal work resumed whilst the request is processed. The spinning timer will return to a static icon and their status is displayed when the check is complete.

To change the registration status manually, click the **Change** button.

Select the appropriate option at the top of the window to indicate what to change the status to and the date the status changed. If there is an entry in the patient's registration record since the date you have entered the current status of the patient will not change, but the fact that there was a previous change in status will be noted in their registration records. Click OK to confirm the changes.

The Responsible Pharmacist

For each MAS Consultation a "Responsible Pharmacist' must be identified. For this the pharmacist must be setup as an assistant in Analyst. When setting up the Pharmacist though, their full name must be used and their RPSGB number must be input onto the assistant page. If more than one registered pharmacist will use Analyst then each one must be setup individually, including any locums which may be used.



A Pharmacist must 'Clock-on' to Analyst at the start of each day before any MAS consultations can be conducted. In the event that this is the only pharmacist in store on a day then they are the responsible pharmacist for all MAS activities that day. If more than one pharmacist is in store then the responsible pharmacist for any MAS consultation is the one currently logged onto Analyst if they are a pharmacist. If the assistant logged on to Analyst is not a pharmacist then the first pharmacist to clock on that morning is responsible for the MAS consultation.

Understanding the CP2

The CP2 itself is not too complicated, but if there are any errors you might need to know where the data comes from which is printed on the form.

The patient's name, address, gender, CHI number and DOB details are taken from the patient record. The pharmacy stamp in the top right is taken from the Licensee details. If this does not print then the option to print in the system configuration is turned off.

If the patient is registering or withdrawing from the MAS then the appropriate box will be checked. Otherwise they will be left blank. The details of any items dispensed are listed in the centre of the form, up to a maximum of two items with their endorsements in the column on the right.

The signature of the responsible pharmacist is required at the bottom and their RPSGB code is printed in the bottom right next to the Pharmacy contract code. Whether the patient was referred to the GP or if it was just a consultation that was held is marked in the bottom left.

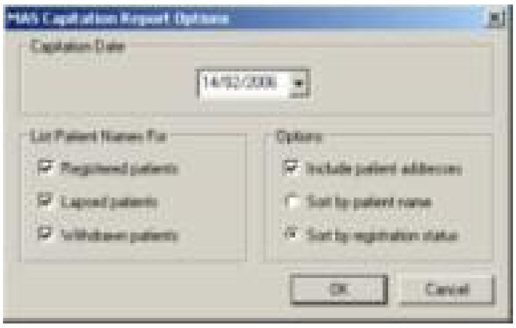
The barcode printed up the left of the form is unique to each session. The 16 character code using letters and numbers which makes the barcode is also printed beneath it and is grouped into four set of four for easy reading. The code means:

Character number	**Meaning**
1	R = Registration C = Consultation W= Withdrawal
2	E = Electronically completed form
3 to 6	Pharmacy Contract Code
7 to 12	Form ID (last form ID found in System Configuration)
13 to 15	Random characters
16	Check digit

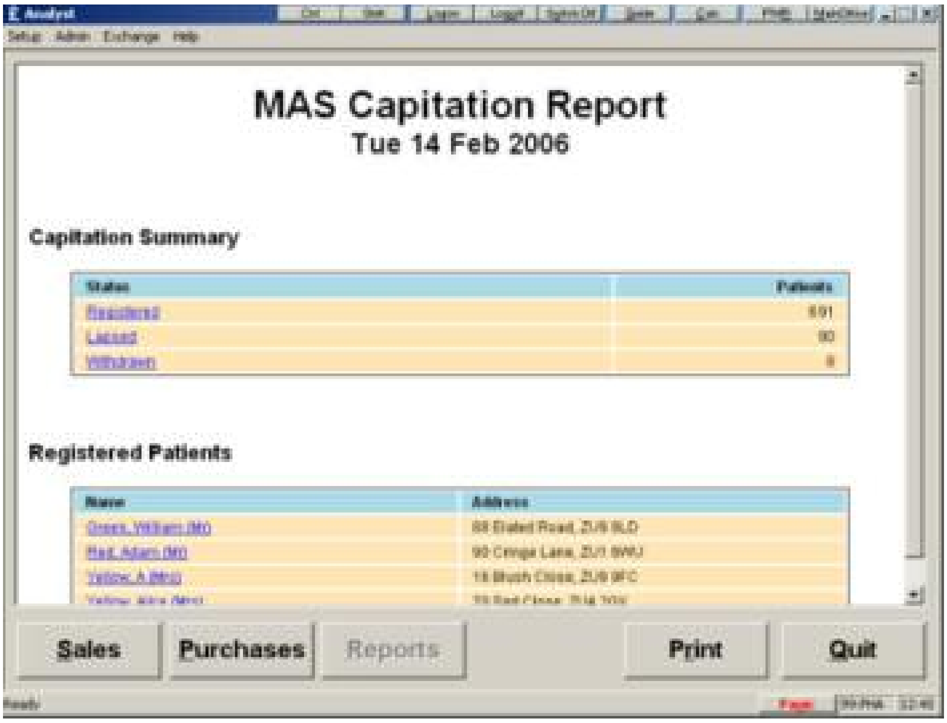
Capitation Report

The Capitation report, found in the reports section, provides an accurate snapshot of the number of patients registered for the Minor Ailments Service on any given date in the past. This is important as the number of patients registered and active (not lapsed) will determine your level of remuneration from NHSScotland.

To run the report click on the Reports section in Analyst PoS and highlight the Minor Ailments Capitation option in the PMR Reports section and click **Run**.



Select the date the report should be generated for, the registration statuses to be included, whether addresses should be displayed and the method of sorting. Click **OK** to generate the report.

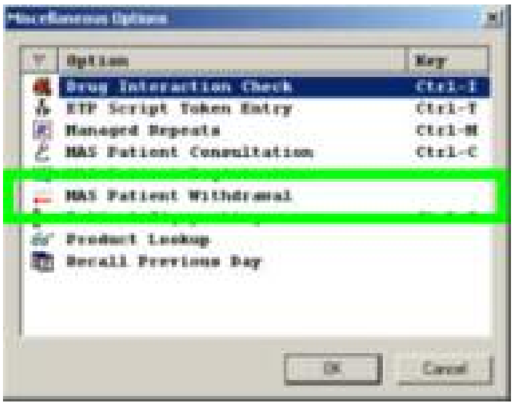


The relevant date for the report is clearly displayed at the top. The summary section provides a count of registered, lapsed and withdrawn patients and the patients in each of those categories are listed beneath. Jump to the listed patients by clicking the status in the summary where the patient editor can be launched for any patient by clicking on their name in the list.

The report can also be printed by clicking the **Print** button.

Withdrawing Patients

If a patient requests to be removed from the service they will need to be withdrawn. This is done by selecting the MAS Patient Withdrawal option found in the **Misc** options in Analyst PMR.



Select the patient to be withdrawn by searching for them. Only patients currently registered are displayed in the search results list. Their details will be displayed for confirmation that this is the patient to be withdrawn. Click **OK** on their details to confirm this. A CP2 will print to be batched up and sent off to the PSD.

AMS

Electronic Acute Medication Service

The electronic Acute Medication Service or AMS is the electronic prescription service used in Scotland.

When using this service the GPs and other prescribers in Scotland not only issue a paper GP10 as usual, but an electronic version which is transmitted up to the Pharmacy Store: an information hub. When the patient subsequently presents the GP10 at a pharmacy of their choice the PMR system retrieves the prescription electronically.

This information already contains the patient's name, address, CHI number, sex and date of birth. The prescriber's details are also included along with the prescription for the drug name, quantity and dose instructions.

This removes the need for the pharmacy to manually identify the patient on their system and then dispense the drugs to them.

Analyst has been developed in such a way that under normal circumstances the flow of information between the pharmacy and the Pharmacy Store will be out of sight and as all of the information is included in the script transmissions the identification of patients and drugs is done for you. All that is required is to check the information and select the actual drug which is going to be dispensed.

If it's all electronic, why still print a GP10?

The script is identified in the pharmacy by scanning a barcode which contains a unique number, called a token, which was printed by the prescriber. This has to be printed on something so has been added to the left hand edge of the GP10. It also provides the patient with something physical to leave the surgery with and provides a manual backup in case of any system failure.

What does an AMS script look like?

Here's an example of an AMS script. It is a GP10 which has been slightly modified to carry an identifying barcode on the left hand edge.

Dispensing an AMS Script

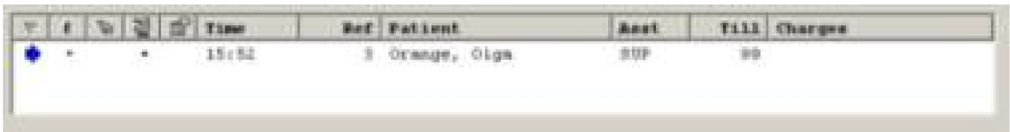
In this topic a typical AMS Script will be dispensed. Deviations from the norm will be discussed in later topics.

Entering the Token & Retrieving the Script Details

As soon as the script is received the barcode should be scanned. This should be done straight from the Script Queue screen. If the barcode won't scan because the script has been faxed through the token can still be entered by clicking the **Misc** button and select 'AMS Script Token Entry' and type in the number typed beneath the barcode. As soon as the code is entered Analyst will contact the Pharmacy Store for the details of the script.

The Script Queue screen will show the new entry. Initially the screen will show an hour glass icon and the token where the patient's name should be.

When the details arrive from the Pharmacy Store, which will normally take a few seconds, the entry changes to an inbound blue arrow and the patient's name will be displayed, which is pulled out of the script details.



More than one script can be scanned at one if required. When a whole batch it scripts has arrived from the surgery they can all be scanned in so the details have been downloaded ready for you to dispense. Each script can only be requested from the Store once; if the same token is scanned more than once a message appears to warn you. This could be a scanning error, if your doing a batch, or maybe the script was faxed and entered manually earlier.

Opening the Script

Once a script is marked with the blue arrow as inbound, all the details have been received and it is ready to dispense. Double click the script to dispense or highlight the line and click the **Expand** button.

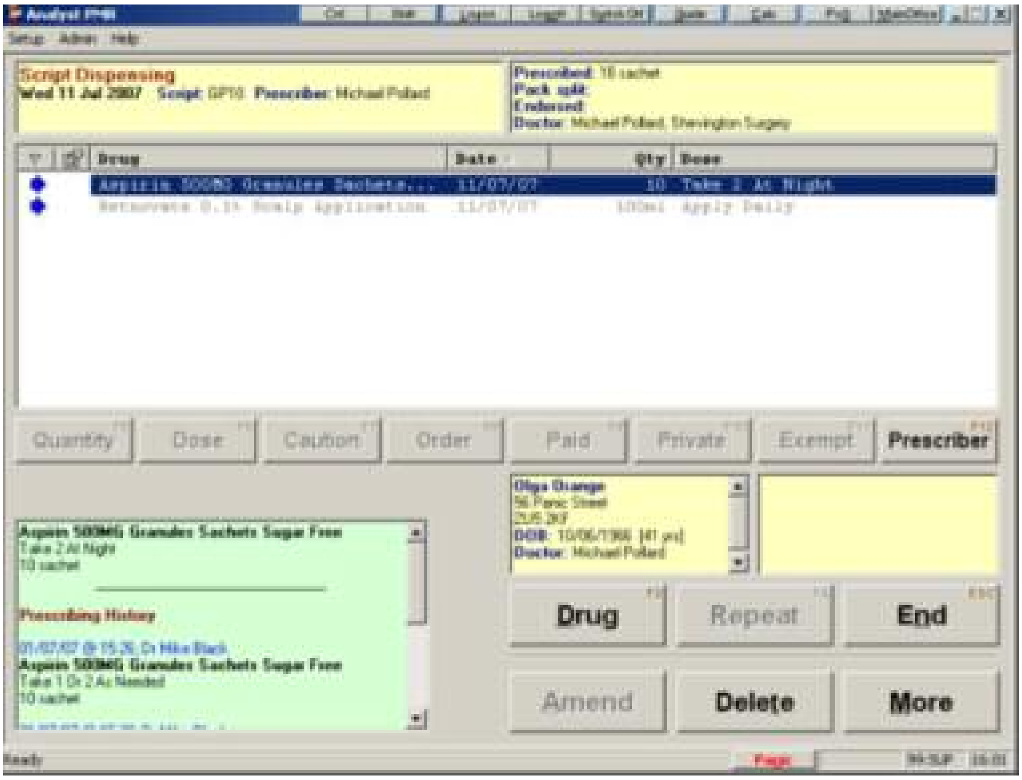
The dispensing screen will open and display an overview of the script in a green window.

This shows the script that has come through from the Pharmacy Store. This should be compared to the GP10 the patient has presented. Unlike a normal printed script, the prescriber has the ability to change the script details after it has left the surgery. The items to be dispensed are displayed at the top. Any cancelled, added or amended items are detailed further down the list.

This electronic version can also be printed by clicking on the **Print** button. This can be used to show the patient if there have been any amendments made to the script since they left with the GP10.

If this script overview screen is not required it can be disabled in the ETP/AMS Tab of the PMR System Configuration.

Click **Close** when the details have been reviewed and, after the patient's usual pop-ups and flags have been displayed and dealt with, the dispensing screen displays. It is already populated with the items which have been prescribed. The label preview window displays the prescription and prescribing history for the highlighted item until it has been dispensed.



Dispensing the Items

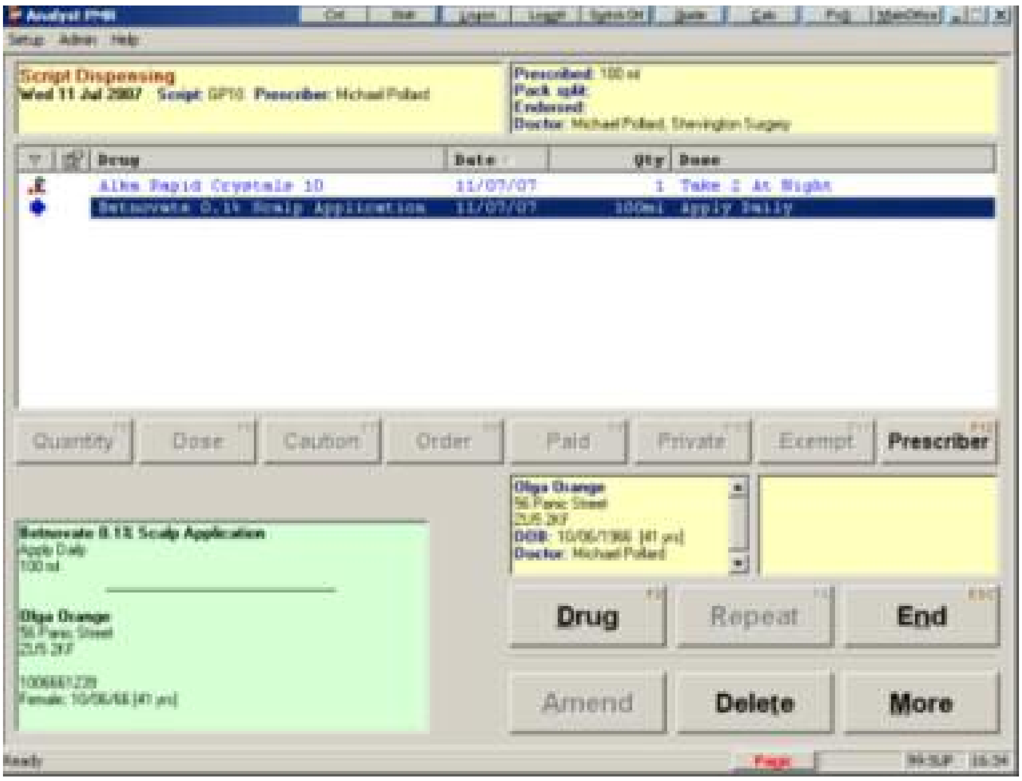
The prescribed item(s) are displayed at the top of the patient's history and the top one, if there is more than one, is already highlighted. Click the **Drug** button or hit F3 to search for the drug to dispense. The drug search is automatically limited to items listed in the dm+d and the drug family of the prescribed item to speed things up*.

Select the item to dispense and click **OK**. If no suitable item is displayed in the list, click the **Search** button to perform a manual search for the item. This manual search is not restricted to items listed in the dm+d so other lines might appear within the same family. When a suitable item is found highlight it and click **OK**.

The drug quantity dialogue now appears.

The prescribed quantity has already been competed from the prescription and the dispensed quantity defaults to that full value (or as many as you have if you have automatic owings turned on). Change the dispensed amount if you need to create an owing. These work in the usual way. Click **Accept** when correct.

No dose instruction screen is required as the prescriber specified that on the script. The dispensing screen returns and moves onto the next item to be dispensed, if applicable.



Repeat until all of the items have been dispensed.

* If the search is not automatically restricted to the drug family the prescriber's system has not included a valid dm+d code for Analyst to link to.

Proof of Exemption

If the patient is marked as exempt the authorities require that you check some paperwork from them to prove their eligibility.

The reason for the patient's exemption is displayed at the top. If this is not correct drop down the options using the arrow to the right of the field and select the correct exemption reason. These are listed in the same order as they are on the back of the GP10.

Exemption reasons which are age related to not require evidence to be checked, but all the others do. Click the 'Exemption evidence seen' box to confirm whether it has been checked or not.

Also place a tick in the 'Patient declaration seen in pharmacy' to indicate that the signed declaration on the back of the GP10 has been seen and checked in the pharmacy.

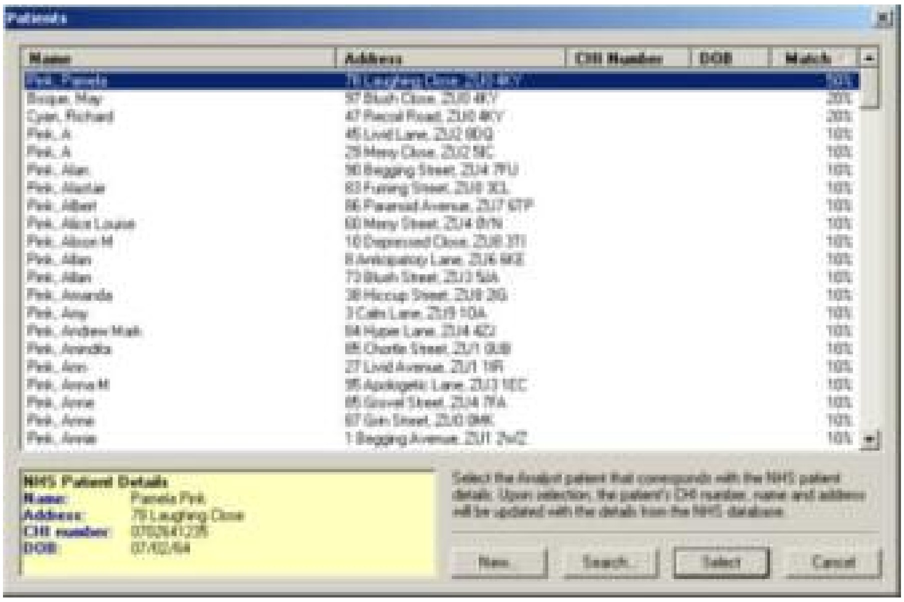
There are a number of options to help move the workload around the pharmacy so the this screen will appear in front of the right person at the right time. Certain options can also be automatically ticked, simply requiring confirmation that exemption evidence has been seen, for example. Look at the options on the ETP/AMS Tab of the PMR system configuration for more details.

This screen can be called at any time during the session by clicking ALT+F2.

Reconciling New Patients

Patients are linked through the system mainly on their CHI number. If a new patient arrives in the pharmacy or their record is incomplete on the system a one-off linking procedure will have to be done.

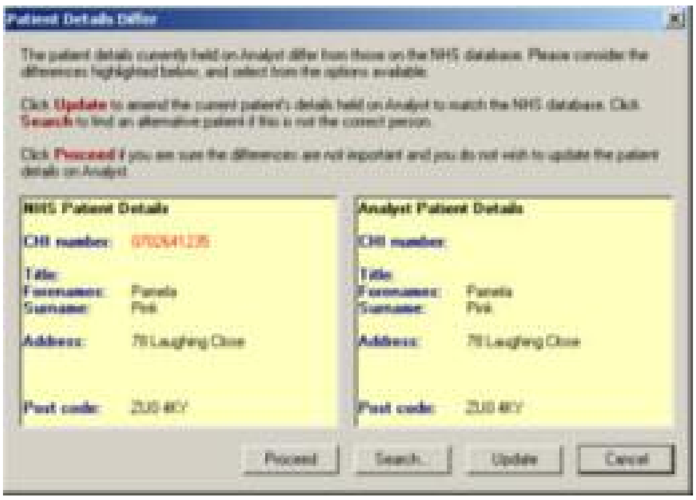
The script will be retrieved from the Pharmacy Store as normal and the patient's name will be displayed as that is taken from the information contained within the script. If there is no suitable match found between the patient on the script and the patient records on the system the following screen will appear:



The details of the patient in the script are displayed in the yellow pane at the bottom left. Analyst performs a search based on the name, address, CHI number and date of birth of that patient and provides a list based on the best matches. The column on the right rates how good the match is and sorts the most likely candidates at the top.

If you are sure that a patient in the list is the correct match for the patient on the script highlight them and click **Select**. If there is no suitable match then either search manually using the **Search** button to find one or **New** to create a new patient on the system. If Creating a new patient, the details available from the script are added to the record to help speed things up.

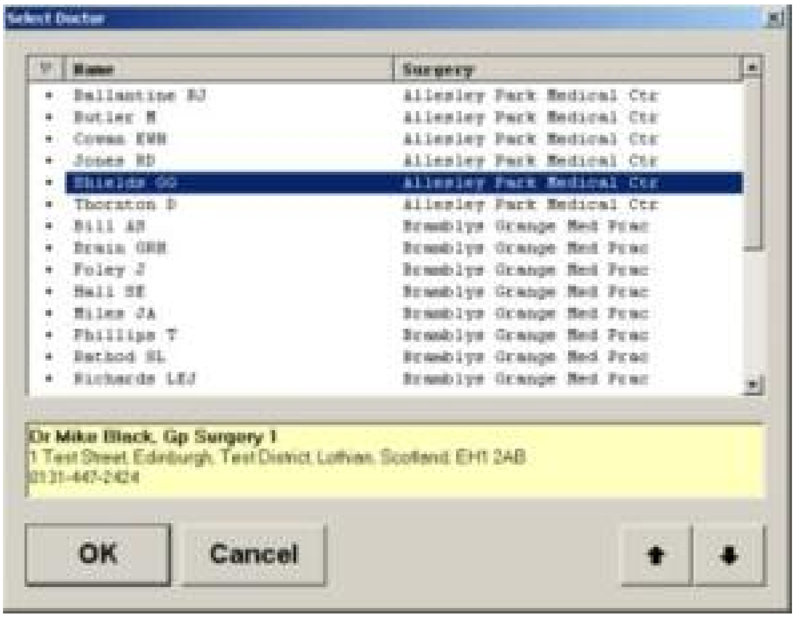
If a match has been found but there are details which have come from the script which don't match the record on Analyst an update screen will appear.



The NHS details are displayed on the left with any non-matching items shown in red. The Analyst record is shown on the right for comparison. Click the **Proceed** button to carry on with this patient without updating their record, **Search** to find an alternative patient, **Update** to update the Analyst record with the NHS details and proceed to the dispensing screen. **Cancel** will return to the Script Queue screen without performing any updates.

Identifying the Prescriber

The identity of the prescriber is included in the script and must be recorded in Analyst. If the prescriber is not recognised by Analyst the following screen will appear listing al of the doctors (or prescribers) in the system:

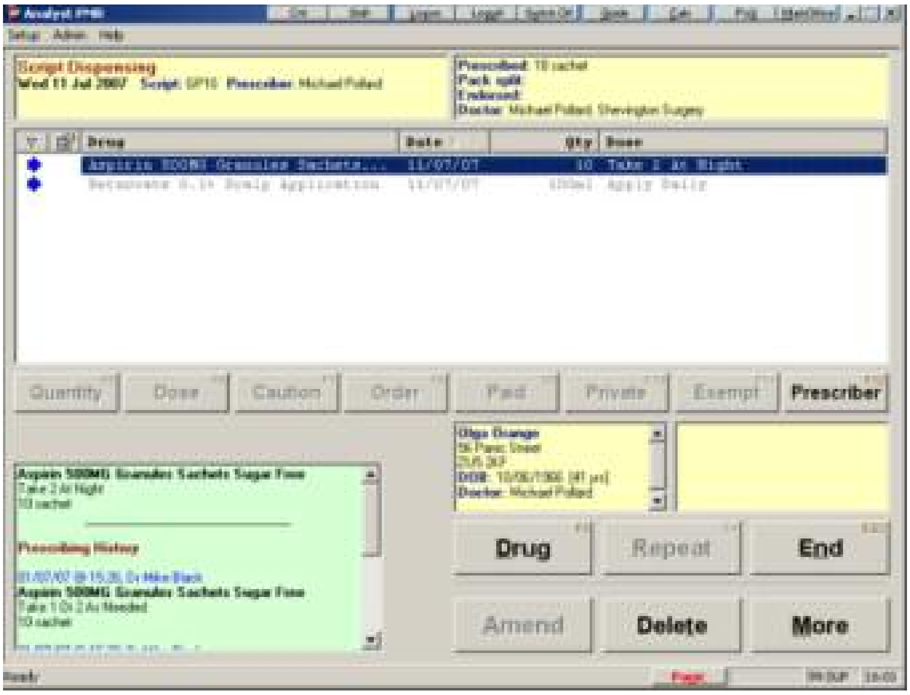


The prescriber's details are displayed in the yellow pane at the bottom for reference. Select the doctor or prescriber responsible for the script and click **OK**. If the doctor does not exist on your system they must be added before the script can be dispensed. Click the **Print** button to print the details onto a dispensing label. Unfortunately, doctors cannot be automatically added to Analyst, so the label will help when entering their details in the normal way.

Once added the script can be dispensed, though this doctor selection screen may appear once more to formally make the link. Each prescriber only has to be linked once, so after the initial few weeks this should be a rare occurrence.

Scanning in Items

If you prefer to scan your items into the PMR you can continue to do so with an AMS script. Select and expand the script as described in the previous topic to display the contents of the script.



Select the items off the shelf and scan the first item in. It doesn't matter which order you scan them in, Analyst will match up the item you have scanned with the correct item in the script. If you are dispensing more than one pack of the same item, just scan one of them.

Entering the Quantity

The Drug Quantity screen is displayed after each pack is scanned and defaults to the prescribed amount. The quantity of some items can be 'ambiguously prescribed': liquids, creams and inhalers in particular where 150ml, 30g or 200D may be prescribed. Depending on the selected pack this might need amendment to the correct number of bottles, tubes or inhalers.

The dispensed amount defaults to the amount prescribed but can be amended if you need to create an owing. Click **Accept** when the amount dispensed is correct.

Repeat this procedure with each item on the script and click **End** to end the session when all the details are correct and to close the session.

Scanning Errors

Only items which match those in the script and are contained in the Dictionary of Medicines and Devices (dm+d) can be scanned in. If you scan something which cannot be matched to an item on the script or is not in the dm+d an error will appear.

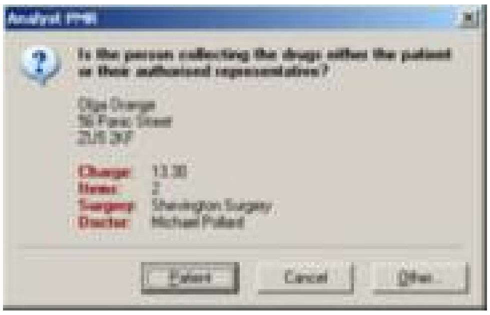
The barcode may not recognised if it has not been entered into the system before. If required it can be added to the appropriate product by pressing **CTRL+Q** to bring up the Product Search dialogue, searching for the appropriate drug and adding the barcode to it.

If the item can not be matched or is not in the dm+d then another equivalent drug must be selected.

Collection of AMS Scripts

The collection of AMS scripts is done in the usual way by scanning the barcode on the bag label, but it is required by the authorities to record who has collected the script.

Scan the barcode on the bag label to confirm that the script is being collected.



Check that the patient's details on the screen match those on the bag and select who is collecting the items. Click **Patient** if the patient is collecting their own medicine or **Other** if they have sent a representative.

Search Analyst for the person collecting the items. If they are not on your system they must be created.

Errors and Amendments

Occasionally there will be errors will be thrown up by the system and they can be for various reasons, which are explored here.

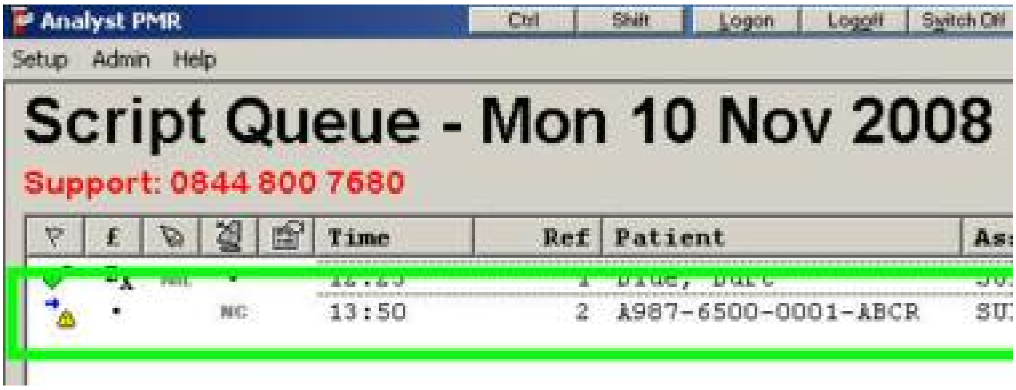
Already Scanned

If the same token is entered more than once a warning is displayed. As each token is unique it can only be scanned or type into Analyst once. If the warning that the token has already been entered appears check you've not scanned it before.

This can be used to your advantage in that faxed scripts can be electronically entered by typing the token in (the barcode probably won't be good enough to scan). When the actual script is presented Analyst will prompt that the token has already been entered and will prevent a double dispense.

Script Errors

An small number of errors can occur with the script once scanned. An error icon is displayed on the Script Queue screen if one occurs.



The token has been scanned but the Pharmacy Store has refused to issue the script. Highlight the line in error and click **Expand** to see the reason.

Invalid Token	The barcode scanned or number has been misread or incorrectly entered.	Try re-scanning or re-typing the token in.
Token Not Found	The token cannot be found on the Pharmacy Store.	Leave a little time before trying again. The prescriber's system may not have posted the script yet. If it fails to appear check with the prescriber; it might be counterfeit.
Token Already Dispensed and Claimed	The script associated with this token has already been dispensed and claimed for.	This script is being re-presented somehow. It might have been initially elsewhere so it's difficult to check.

In each of the cases, if the script is genuine and all systems are functioning correctly, the prescriber will need to re-issue the script to create a new token and form.

Amendments by the Prescriber

Unlike the paper system alone, the prescriber has the ability to add to, amend or remove items on the script after the GP10 has been printed and issued. The prescriber is able to do this up to the point where Analyst requests the script from the Pharmacy Store. The script and all amendments are received together from the Store.

The script overview window displays the final script after all of the amendments have been processed.

To view the amendment history of each item scroll down the page. The image above has been expanded for clarity. The top section above the dividing line is the final script that should be dispensed. Each diving line beneath that represents the changes to an item on the script. More than one amendment can be listed for each line: it depends on how many were made. Each of the amendments are dated and the change to the previous instruction are shown in red.

Amendments by the Dispenser

Although many of the details of each item are completed by the prescriber there is still the facility to make amendments. Once the item has been dispensed use the **Amend** button. The quantity prescribed or dispensed, the description of the drug, the dose instructions, the charge and the caution can all be changed before issuing the items to the patient.

Endorsing and Claiming

The Endorsement

In addition to printing the endorsement on the GP10 to claim payment, an electronic claim must be sent. The endorsing is performed in the usual way, though with eMAS Structured Endorsing is always used when editing the endorsement. Read the Structured Endorsing topic for a more complete guide on this section.

Modify the endorsement to suit your needs including the AMS only fields of Installments and the dispensed Quantity over-ride and click **OK**. Though note: Installment dispensing can only be endorsed if it has been sent with an endorsement from the prescriber.

When all of the endorsements in a session are correct click the **Print** button to complete the GP10. If the endorsement of an item has not entirely fit into given space during printing a warning will appear on screen to manually check and modify the endorsement.

The Claim

From February 2010 the claim is now be sent to the Pharmacy Store for payment electronically for 80 lines out of Part VII of the Drug Tariff. The content of the claim conforms totally to the specification of the Health Board, has undergone rigorous testing and has been approved by the Health Board.

From the Script Queue screen click on the **Misc** button and select the "AMS Dispensing Claims" or hit CTRL+K on the keyboard.

The Claims screen will now display.

The scripts which have not claimed appear at the top in blue with claimed scripts lower down in green. To claim for a script highlight the line in the list and click the **Submit** button. Don't expect an immediate acknowledgement from the Pharmacy Store as it can take some time to process the claim. Analyst will wait for up to 4 days for a response.

When a response is received the status will change.

Claimed	The claim has been accepted
Already Claimed	A claim for this token has already been processed
Claim Timeout	No response has been received in 4 days

Revoking a Claim

If a mistake has been made in a claim which has been submitted it can be revoked, as long as it hasn't been processed already. Highlight a script which still marked as 'Claiming...' and click the **Revoke** button. The status will change to 'Revoking' and will eventually change to one of the following:

Revoked	The revocation has been accepted
Already processed	The claim has already been processed
Revoke timeout	No response has been received in 4 days

Once the script has been revoked the endorsements can be amended and re-submitted by clicking the **Submit** button.

Automating the Claim Procedure

If required the electronic claim can be sent to the Pharmacy Store when the GP10 is endorsed. Open the ETP/AMS Tab of the PMR System Configuration and select the option "Submit AMS dispensing claim when endorsements are printed". When selected the claim will be submitted when the **Print** button is clicked for the endorsement.

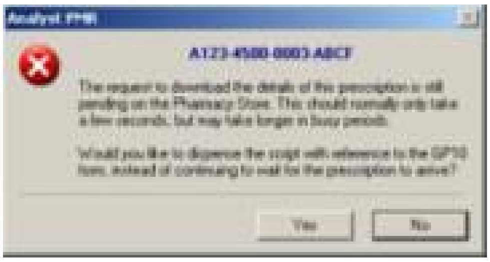
The drawback of this option is that scripts which do not need a physical endorsement will still need to be sent through the printer to submit the claim. Though the manual claim procedure outlined above will still be available.

Freehand AMS Dispensing

Occasionally there might be a delay in the delivery of the script from the Pharmacy Store. This will not affect your ability to dispense the script through Analyst.

Once a token is scanned in, Analyst allows 30 seconds for the script to be retrieved from the Pharmacy Store. If the script is not send down in that time, it can be dispensed manually.

Highlight the line in the Script Queue screen and click **Expand**. A warning will appear explaining that the script has not been downloaded yet.



Click **Yes** to dispense the script from the GP10.

A normal non-AMS dispensing session will now begin. Dispense the items as prescribed on the GP10.

Reconciling the AMS and Freehand scripts

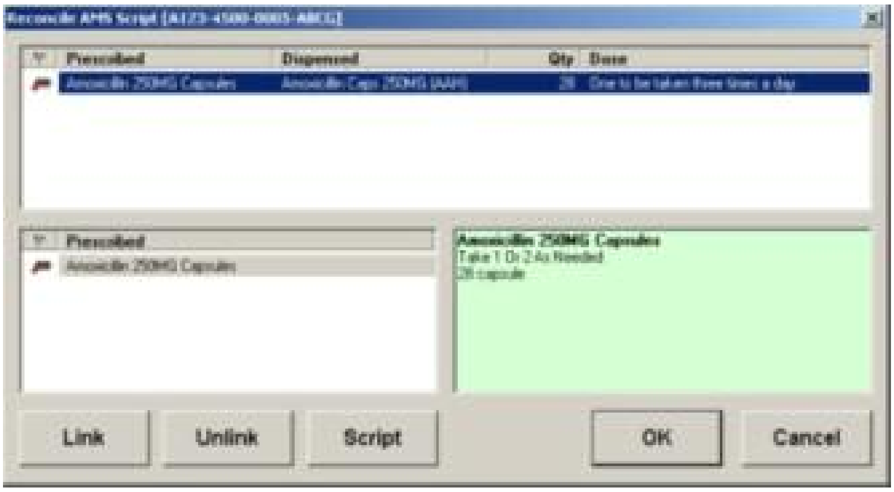
The script will eventually be retrieved from the Pharmacy Store. Analyst already knows what was dispensed from the freehand session which was performed, but the two need to be manually reconciled.

Once the script has arrived, denoted by the inbound blue arrow and patient's name being displayed, go into the AMS Dispensing Claim section by clicking **Misc** and selecting **AMS Dispensing Claims** or by pressing CTRL+K on the keyboard.

The session in question will show in the list as 'Not Reconciled'. Highlight the line and click the **Reconcile** button at the bottom of the screen (It replaces the **Retry** button when a non-reconciled line is highlighted).

If the patient which was manually dispensed to does not match the patient in the electronic script then they too will have to be reconciled.

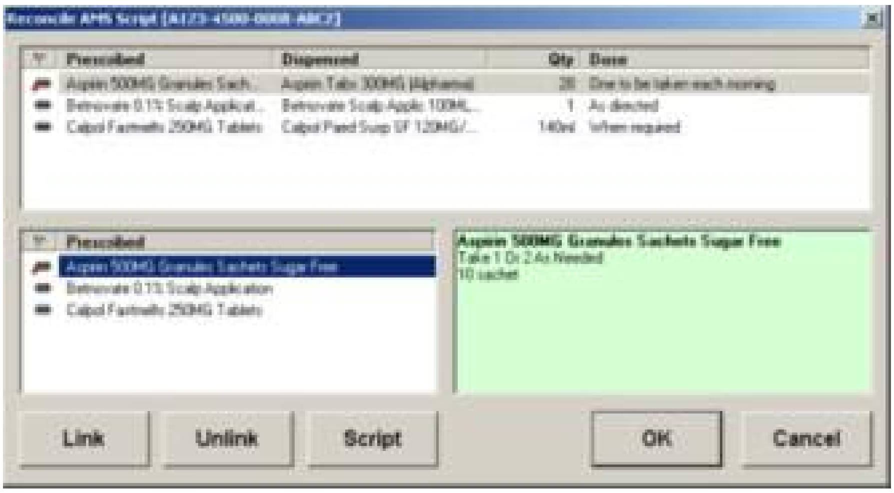
The Drug Reconciliation screen will appear.



The top pane shows what was actually dispensed during the freehand dispensing session. The bottom left lists the prescribed items on the script and the bottom right in green shows the actual electronic script details for the item highlighted in the bottom right pane.

Analyst will attempt to link the items together. Lines which have the chain link icon next to them are already linked, but they should be checked to make sure they are linked together correctly. In the example above, with only one item, the linking is straightforward. When correct click **OK**.

This example contains three items:



The link icon with the red dot indicates that line corresponds to the line in the opposite pane which is highlighted. Look through the three lines and check that Analyst has linked them correctly. If not, highlight an incorrectly linked lines, in either pane, and click **Unlink**. Unlink all incorrectly linked items.

To re-link items highlight the correct items to be linked in each of the panes and click the **Link** button.

Click the **Script** button to see the details of the original electronic script.

When all of the items are linked correctly click the **OK** button. The script will now appear on the claims list as 'Not claimed'.

Installment/Weekly Dispensing

Analyst doesn't contain a specific facility to cater for the 'Dispense Weekly' instruction in Scotland. But it can endorse correctly to ensure correct payment.

Dispensing

The easiest way to deal with the weekly dispensed scripts is to treat them as owings. If 28 tablets are prescribed over a 4 week term it should be entered that 7 will be dispensed this time and 21 will be owed.

The owings label which is produced can be attached to the patient's folder or card to make the dispense quicker next week.

For the following week pick up the owing in the patient's history or scan the owings labels into Analyst and dispense another 7 leaving 14.

If you're scanning the labels, the new one which printed now needs to be attached to the patient's folder or card.

Repeat each week until all installments have been dispensed.

Endorsing

Once complete (or after the initial dispense if this option [PMR System Configuration | Endorsing | Warn when endorsing scripts with outstanding owings] is selected) the script can be endorsed.

Be sure to **Edit** the endorsement as Analyst will not automatically add the installment endorsement.

Check the box for Installments. The following box will appear:

Complete the total number of installments, the number of those which were supervised and the quantity issued for each installment. Then click **OK**.

The endorsement is then displayed in the agreed format. Now click **Print** to print the endorsement on the script.

CMS

Introduction To CMS

CMS is the Chronic Medication Service launched in Scotland on 2010 to cater for repeat dispenses to patients in the community.

A single GP10 is issued by the prescriber which is used several times to dispense installments of medication over a period of time. Analyst has been developed in consultation with NHS Scotland and has been passed as compliant with all their requirements.

Responsible Pharmacist

In order to communicate with the ePharmacy Store (The Store) the Responsible Pharmacist must be identified in Analyst. This is done by using the Responsible Pharmacist feature.

Configuration

Your printer will need to be loaded with the new forms which contain the CP3s for CMS registration. The configuration of their printing is on the MAS/CMS Tab of the System Configuration.

More Information

For more information on the scheme contact your Health Board or click here to read up on the web.

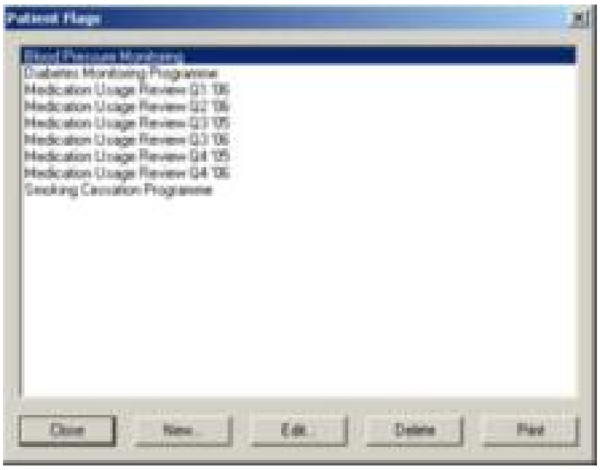
Identifying CMS Candidates

The biggest task initially is to identify candidates for the scheme and to sign them up. There is no specific tool for this in Analyst as there are already adequate mechanisms. Potential candidates can be identified from their medication history, known list of conditions, demographics or other set of criteria and have a Patient Flag set against them. This flag will pop up each time their dispensing screen appears as a reminder to complete the registration.

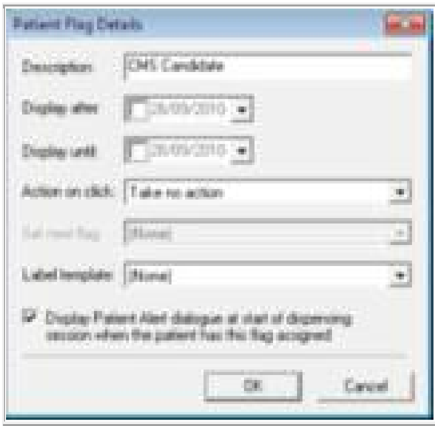
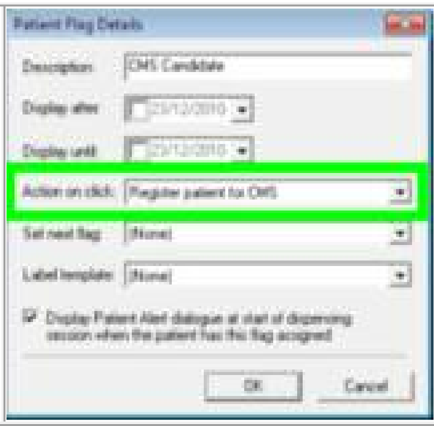
Setting up the Patient Flag

Open the Patient Flags section by clicking Setup, Patients and Patient Flags.

The list of existing flags now appears.



Click on the **New** button to add another.

	
Version 3.45.10	Version 3.46

Type in the name 'CMS Candidate' at the top. It can be set to operate over a date range if required but in this instance leave them alone. If you're still using Analyst 3.45.10 that's all you can do. Version 3.46 allows direct access to the CMS registration by clicking on the flag in the patient alert. If you're using the new version drop down the 'Action on click' box and select 'Launch CMS registration dialogue', and leave the 'Set next flag' at '(none)'. In either case there's no need to select a label template and the tick at the bottom must be ticked to make the thing appear.

Click **OK** when complete.

Using the APS to assign the flag to candidates

The Advanced Patient Search (APS) is a facility which allows a list of patients to be displayed that match certain criteria.

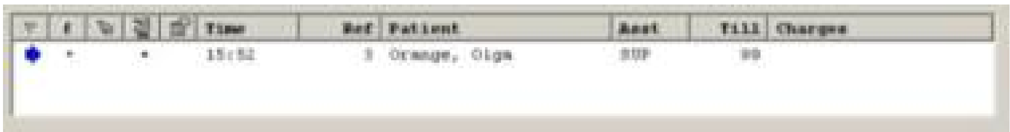
Requesting the Script

The script is requested in one of three ways. The token can be scanned like an AMS script or, if this is not the first installment of a new script, it can be requested through the CMS Prescription Request section found under the **Misc** button.

Scanning the token

The token should be scanned on the Scripts Queue screen. The details will then be retrieved from the Store.

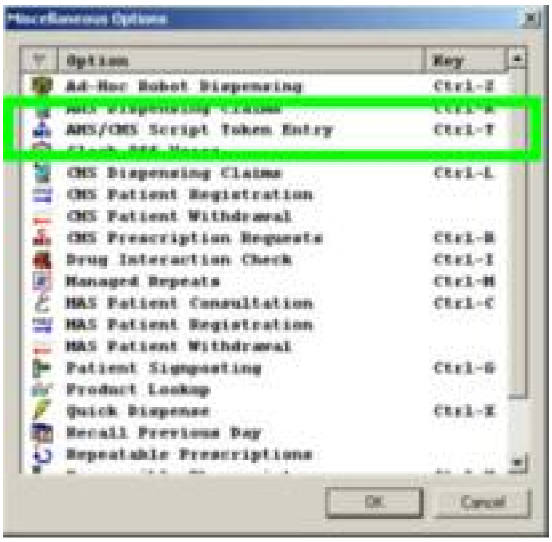
An hourglass appears next to the token ID while the Store is processing the request.



When the details have been retrieved the patient's name is displayed and the hourglass is replaced with a blue arrow. The items can now be dispensed.

Entering the token manually

If the token barcode will not scan, but the number is still legible it can be entered manually by selecting the "AMS/CMS Script Token Entry" option under the **Misc** button.

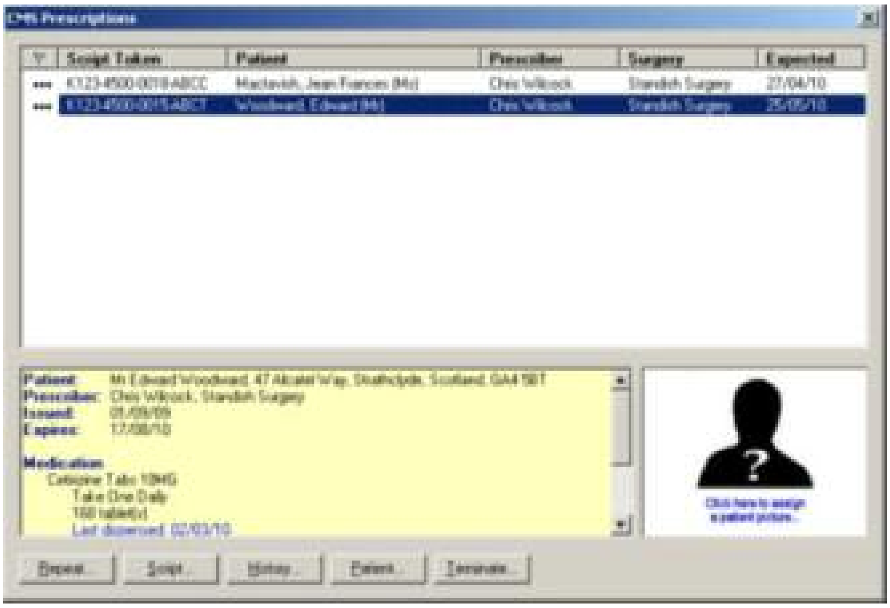


A keyboard dialogue appears for the token to be typed into. When complete click the **OK** button or press Enter and the script will be retrieved from the store. When the patient's name is displayed with a blue arrow on the Script Queue screen it is ready to dispense.

Without scanning the token

The first time a CMS script is presented it must be scanned, or have the number typed in manually. After this though the script can be requested from a list of ongoing CMS scripts. Click on the **Misc** button and select the "CMS Prescription Requests", or use the CTRL+R keyboard short cut.

The CMS script list appears and displays all ongoing scripts.



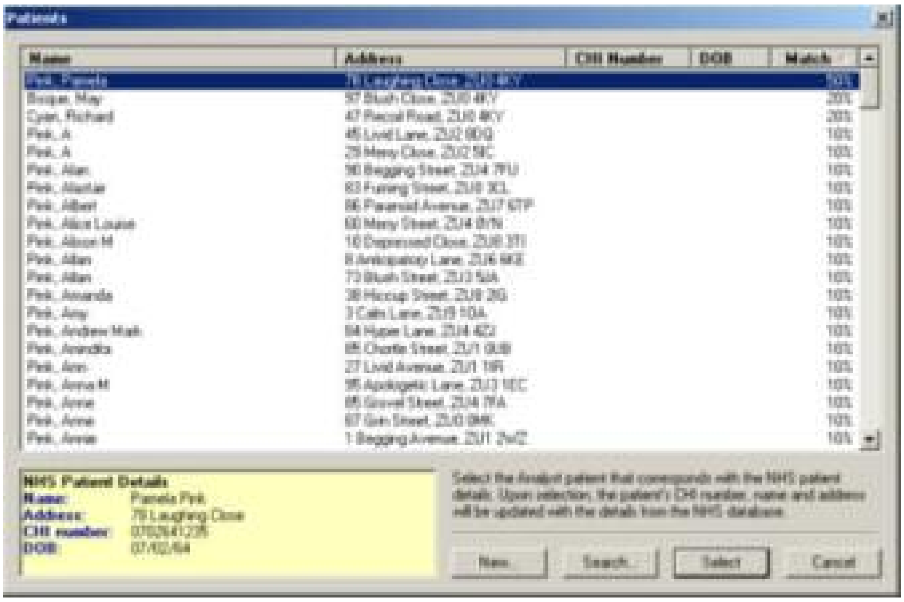
This screen is explained in the Managing CMS Scripts topic.

For now, select the required patient and click the **Repeat** button. This sends the request to the store and returns to the Script Queue ready to dispense it.

Reconciling New Patients

Patients are linked through the system mainly on their CHI number. If a new patient arrives in the pharmacy or their record is incomplete on the system a one-off linking procedure will have to be done.

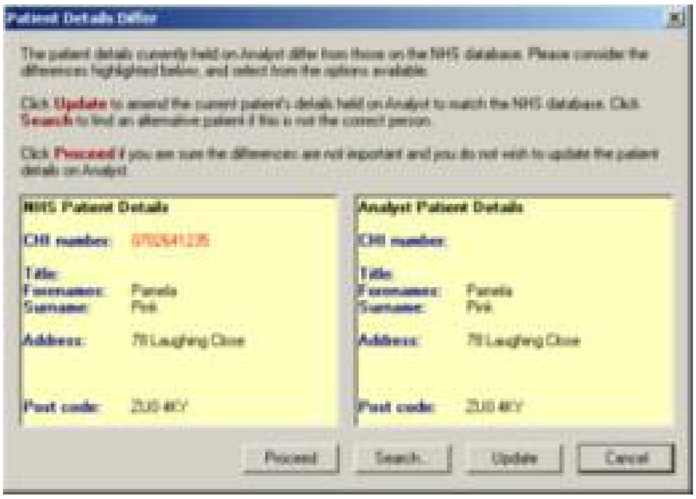
The script will be retrieved from the Pharmacy Store as normal and the patient's name will be displayed as that is taken from the information contained within the script. If there is no suitable match found between the patient on the script and the patient records on the system the following screen will appear:



The details of the patient in the script are displayed in the yellow pane at the bottom left. Analyst performs a search based on the name, address, CHI number and date of birth of that patient and provides a list based on the best matches. The column on the right rates how good the match is and sorts the most likely candidates at the top.

If you are sure that a patient in the list is the correct match for the patient on the script highlight them and click **Select**. If there is no suitable match then either search manually using the **Search** button to find one or **New** to create a new patient on the system. If Creating a new patient, the details available from the script are added to the record to help speed things up.

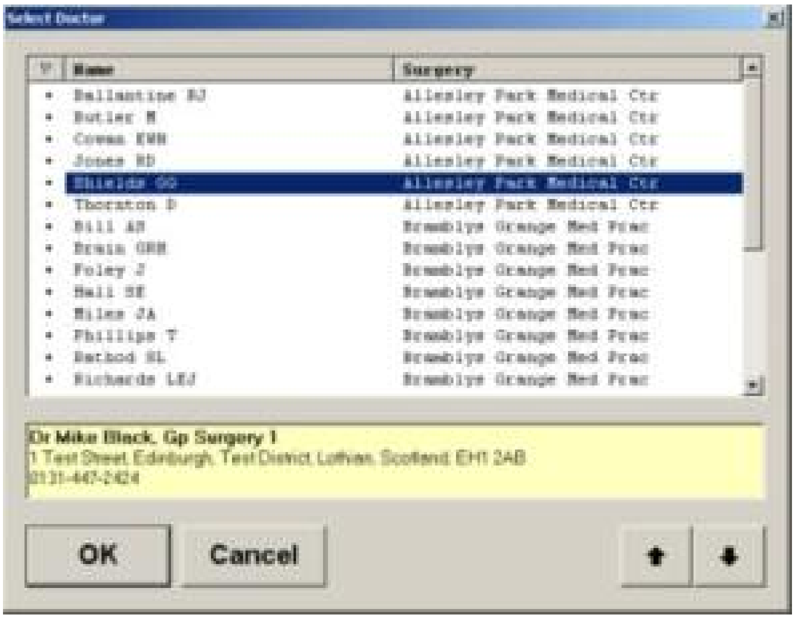
If a match has been found but there are details which have come from the script which don't match the record on Analyst an update screen will appear.



The NHS details are displayed on the left with any non-matching items shown in red. The Analyst record is shown on the right for comparison. Click the **Proceed** button to carry on with this patient without updating their record, **Search** to find an alternative patient, **Update** to update the Analyst record with the NHS details and proceed to the dispensing screen. **Cancel** will return to the Script Queue screen without performing any updates.

Identifying the Prescriber

The identity of the prescriber is included in the script and must be recorded in Analyst. If the prescriber is not recognised by Analyst the following screen will appear listing al of the doctors (or prescribers) in the system:



The prescriber's details are displayed in the yellow pane at the bottom for reference. Select the doctor or prescriber responsible for the script and click **OK**. If the doctor does not exist on your system they must be added before the script can be dispensed. Click the **Print** button to print the details onto a dispensing label. Unfortunately, doctors cannot be automatically added to Analyst, so the label will help when entering their details in the normal way.

Once added the script can be dispensed, though this doctor selection screen may appear once more to formally make the link. Each prescriber only has to be linked once, so after the initial few weeks this should be a rare occurrence.

Registering Patients

To dispense a CMS script to a patient they must be registered with your pharmacy. This can be done as part of the dispensing procedure or separately.

As part of a dispensing session

Scan or manually enter the new CMS script as normal and open the script to dispense it. Reconcile the patient to your records or add them if necessary. If the patient is not currently registered at this pharmacy the following message will appear to tell you so and will give you the opportunity to register them now.

Click **Yes** to register them now. Their details are now displayed.

All of the fields highlighted in red must be completed for the CMS registration. Some of the fields will be completed with the information which was retrieved from the Store. When complete click **OK** to print out their registration form (CP3). This will require the patient's signature.

Once the form is printed the dispensing session is started as normal. The electronic registration process continues in the background.

Registering without dispensing

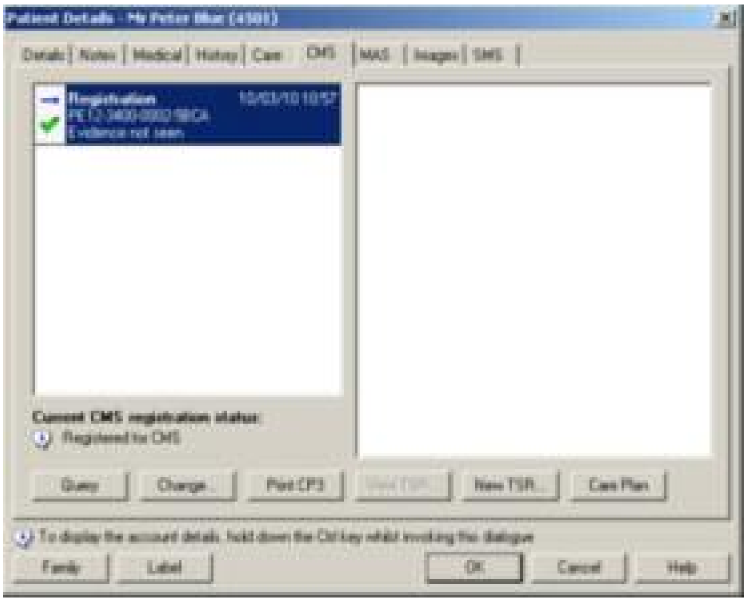
Patient's can be registered without the need for them to present a script. Click on the **Misc** button and select the CMS patient registration option.

Search for the patient. Select them from the search list or click **New** to add them to your system.

Their details are now displayed and all of the fields marked in red must be completed. Click **OK** when complete to print of the CP3. The electronic registration process completes in the background.

Checking a patient's registration status

To check a patient's CMS registration status open their record in the patient editor. This can be done through Setup, Patients and Search Patients or by clicking on the patient info panel from their dispensing screen. Click on the CMS tab.



The patient's registration is displayed at the bottom left. This can be checked directly with the Store by clicking the **Query** button. They can be registered or withdrawn by clicking the **Change** button and a CP3 can be printed at any time by using the **CP3** button.

Treatment Summary Reports can be created and viewed using the **View TSR** & **New TSR** buttons. Use the **Care Plan** button to view the patient's care plan online or export the PMR history.

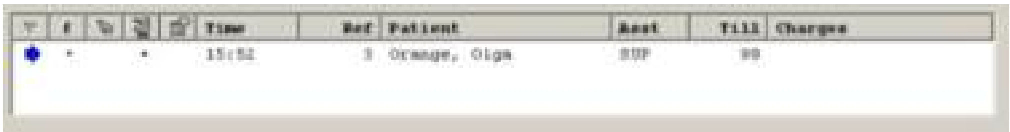
Bulk Registration

By using the Advanced Patient Search facility, a list of suitable candidates for CMS can be listed and registered en masse. Follow the instructions in the APS section and use the confirmed conditions and medication history to limit the report to patients who will benefit from the scheme.

Dispensing a CMS Script

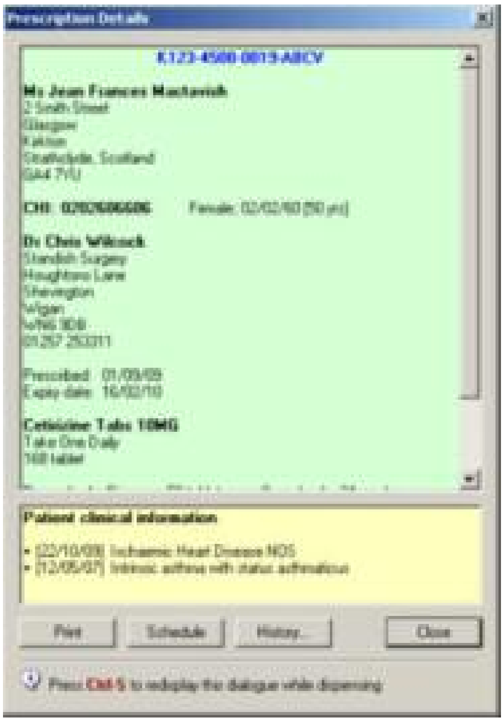
Once the script details have been retrieved from the Store it can be dispensed to the patient. If the connection to the Store has been lost or it is taking a very long time to retrieve the details, the script can be dispensed manually.

Scripts which are ready to dispense are displayed on the Script Queue screen with a blue arrow next to them



To dispense it highlight it and click **Expand** or double click it.

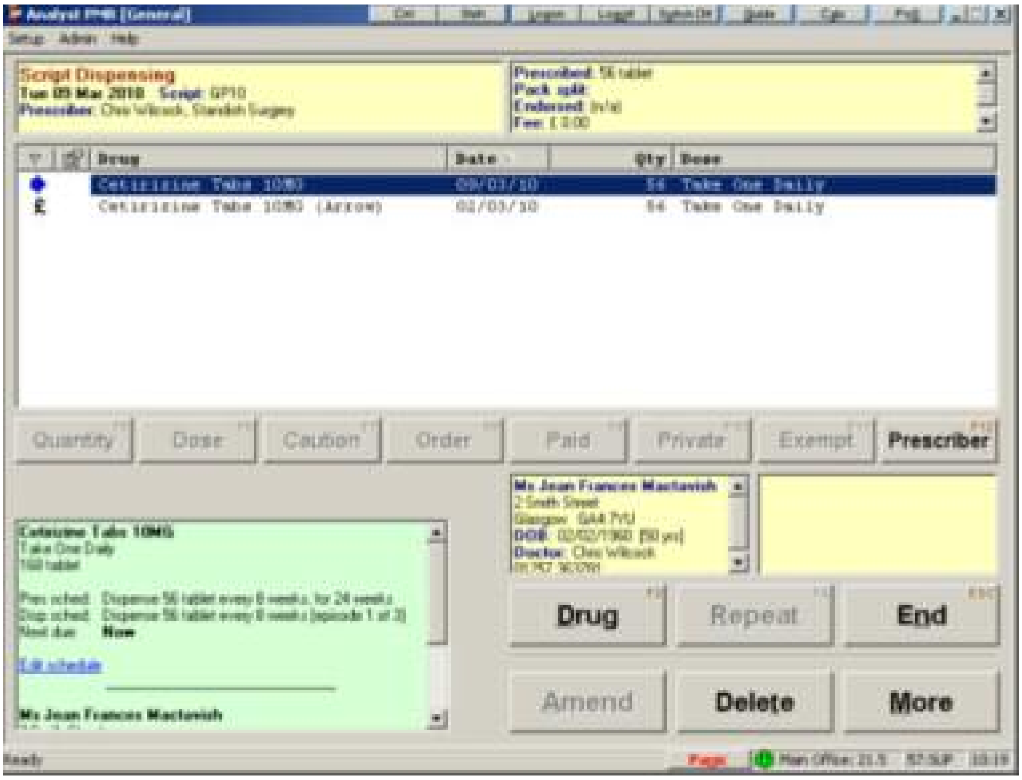
The dispensing screen for the patient opens and the script details are displayed.



This details on screen should match the GP10 in hand, but the prescriber does have the ability to make changes once the GP10 has been issued. Any changed which have been made will be displayed here.

Click on **Close** once the script has been reviewed for any changes and to start dispensing.

The patient's dispensing history is now displayed with the new CMS lines at the top with blue arrows next to them and the method of dispense is identical to dispensing AMS items.



If you have requested the script before it is due or if it has already been dealt with you may see some other icons next to items too:

	This item is ready to dispense
	This item's schedule has already been satisfied
	This item has been requested before the next scheduled installment is due
	This item has already been over-dispensed

If the item has been requested early, or is satisfied or has been over dispensed already you will be asked to confirm that you really do want to dispense it now.

Confirming the Charge

The CMS regulations require that the charge for each item, if appropriate, is confirmed if the patient is not exempt from charges. After dispensing each chargeable item the charge box will appear.

The default charge for an item is taken from the System Configuration and in most cases will simply be confirmed. If this is a multiple charge item this might need to be changed. Confirm the price or amend it to be correct and click **OK** or press Enter. If and when the NHS Prescription charge is abolished in Scotland this confirmation will no longer be displayed.

Ending the Session

At the end of the session the reason for any exemption must be stated and the evidence they have presented must be confirmed as seen. A valid postcode of the patient must also entered.

The reason for the patient's exemption is displayed at the top. If this is not correct drop down the options using the arrow to the right of the field and select the correct exemption reason. These are listed in the same order as they are on the back of the GP10.

Exemption reasons which are age related to not require evidence to be checked, but all the others do. Click the 'Exemption evidence seen' box to confirm whether it has been checked or not.

Also place a tick in the 'Patient declaration seen in pharmacy' to indicate that the signed declaration on the back of the GP10 has been seen and checked in the pharmacy.

There are a number of options to help move the workload around the pharmacy so the this screen will appear in front of the right person at the right time. Certain options can also be automatically ticked, simply requiring confirmation that exemption evidence has been seen, for example. Look at the options on the ETP/AMS Tab of the PMR system configuration for more details.

This screen can be called at any time during the session by clicking ALT+F2.

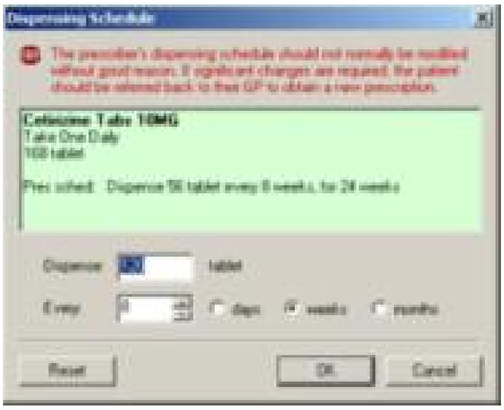
Changing the Schedule

When the script is opened there is the opportunity to change the schedule specified by the prescriber.

Only minor changes should be made to the schedule to correct errors. If major changes are required or the schedule is inappropriate the script should be returned to the prescriber for a replacement.

On the script preview scroll down the details and click 'Edit Schedule' underneath the item of choice or click the **Schedule** button. A list of items contained in the script will appear from the button. Select the item to change.

The prescriber's schedule is now displayed.



Change it to suit and click **OK**. If the new schedule exceeds the total amount prescribed a warning will appear.

CMS Claims

All claims for CMS activity is electronic and must be submitted manually. As scripts are dispensed the claim list accumulates in the background ready for you to review and submit them.

To review the claims click on the **Misc** button and select 'CMS Dispensing Claims' or use the CTRL+L keyboard shortcut.

The CMS Claims screen is then displayed.

The left column displays the claim status icon. The second, displays whether or not the patient declaration has been completed (without which a claim cannot be submitted). The time of the dispense and the patient name are next followed by the drug. Unlike the AMS where the claim is lodged for each script, CMS claims are per item.

To submit a single claim it must have a completed patient declaration and be 'Not claimed', 'Amended' or 'Revoked'. Highlight it and click **Submit**. The Store will process the claim and will soon return notification that the item has been 'Claimed' or 'Rejected'.

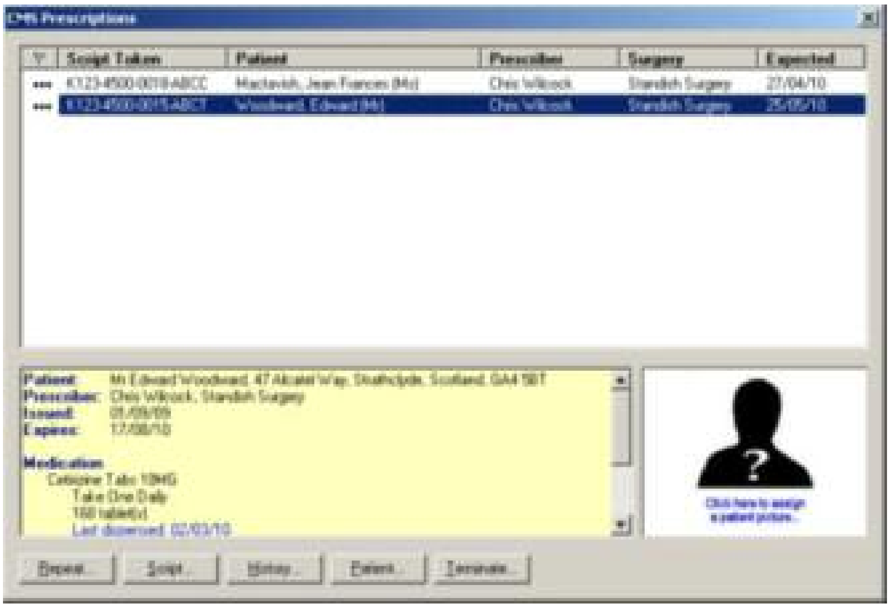
Here is a full list of statuses and how they can be turned round into a successful claim, if at all.

Status	Icon	Problem	Action	Outcome (after the Store has processed it)
Not Claimed	*	Not yet claimed	Ensure the patient declaration is complete and submit the claim with the **Submit** button.	Claimed
Amended		The details of the dispense have changed since the initial claim was submitted.	Resubmit the claim with the **Submit** button.	Claimed
Claim timeout				
Not reconciled		The script was dispensed manually after the Store took too long to return the details.	Use the **Submit** button to reconcile the manually dispensed lines to the CMS lines. The claim is submitted automatically afterwards.	Claimed

No Items		No items were dispensed on this script.	None required.	
Claiming		The Store is processing the claim. This should take seconds but can sometimes take longer or get stuck.	Non required. The store is processing.	Claimed
Revoking		The Store is processing the revocation. This should take seconds but can sometimes take longer or get stuck.	Non required. The store is processing.	
Revoked		This item has been claimed.	The claim can be submitted again if required but using the **Submit** button.	Claimed
Claimed		This item has been claimed.	None required. Sit back and wait for payment.	
Claim rejected		The Store have rejected the claim.	If you know why it's been rejected, amend it and re-submit. Otherwise call the PCD.	
Already claimed		A claim for this item has already been submitted.	None necessary unless the original claim needs to be amended and re-submitted.	

Managing CMS Scripts

Once a patient has registered at your pharmacy and has presented a CMS script, the details of the script can be viewed in a separate section of Analyst. Click on the **Misc** button and select 'CMS Prescription Requests' and click **OK**, or use the CTRL+R keyboard shortcut.



All patients who have ongoing CMS prescriptions, or who have recently finished a course, are displayed in this screen. The icon down the left indicates the status of each script.

	The next scheduled installment is overdue
	The next scheduled installment is due within three days
	The script has been requested but has not yet been released by the Store
	The script has been retrieved and is ready to dispense
	This patient is up-to-date with their medication and has further installments due
	This script has been withdrawn by the prescriber or has expired
	All installments of this script have been dispensed
	This script has been deleted
	This patient has withdrawn from CMS at this pharmacy

The Script Token can be used to distinguish between several scripts for the same patient. The patient's name, prescriber of the script and their surgery are straightforward. The Expected column displayed the next date of dispense, as laid out in the schedule.

The full details and dispensing history for each script can be viewed in the bottom left when a script is highlighted.

Requesting the Script

When a patient is due their next installment of medication the icon will change to the calender. The script can be requested from the Store by highlighting the patient and clicking the **Repeat** button. This screen will then disappear and will return to the Script Queue screen ready to dispense the script.

More than one script can be highlighted at once and requested all at the same time.

Other facilities

The details of the script can be viewed at any time by clicking the **Script** button.

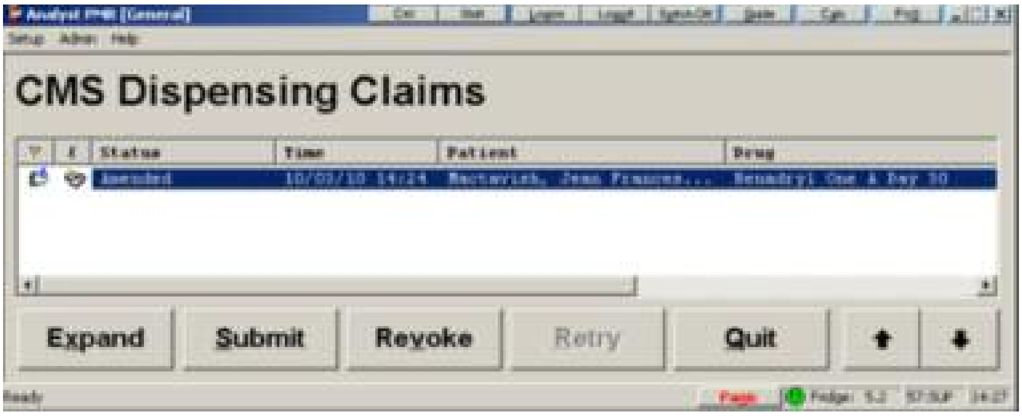
The dispensing history of items associated with this script can be viewed using the **History** button either from this script view or from the main screen. The patient details can be viewed using the **Patient** button and the script schedule can be terminated at any time with the **terminate** button.

Making Amendments

Amendments to dispensed items are permitted even once the original dispense had been claimed for.

Amendments are possible in the usual way: by opening either the patient's record in a new dispensing session ore opening the actual session to be amended. Select the drug to change in the patient's history and click **Amend** then the aspect of the drug to be changed.

Once the change has been made the claim will need to be resubmitted. Open the claim screen and locate the claim. It will be marked as 'Amended'. and the icon will include a delta (δ) symbol.



Highlight the amended items and click **Submit**. Amended claims do not have to be revoked before re-submitting.

Manually Dispensing and Reconciling

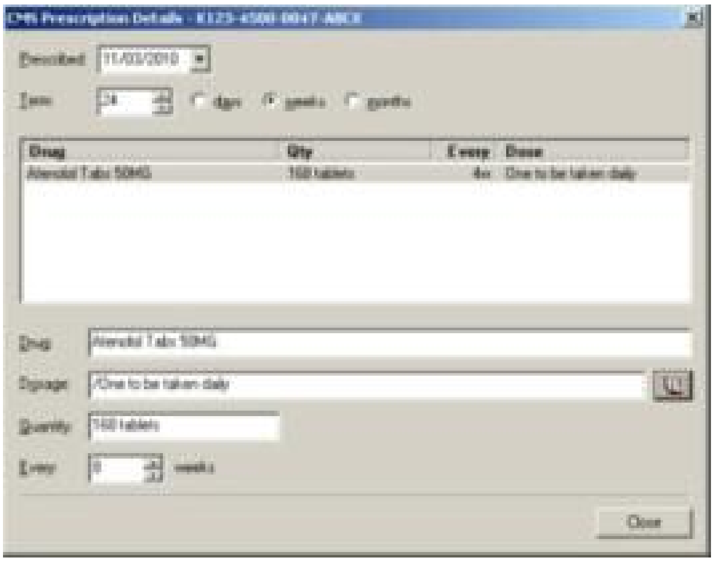
If the Store takes more than 30 seconds to deliver the script it can be dispensed manually with reference to the GP10. But in order for it to be claimed the dispensed items must be married up to the prescribed items when the script is finally returned from the Store.

After 30 seconds of waiting for the script click **Expand**.

To dispense the script manually click **Yes**.

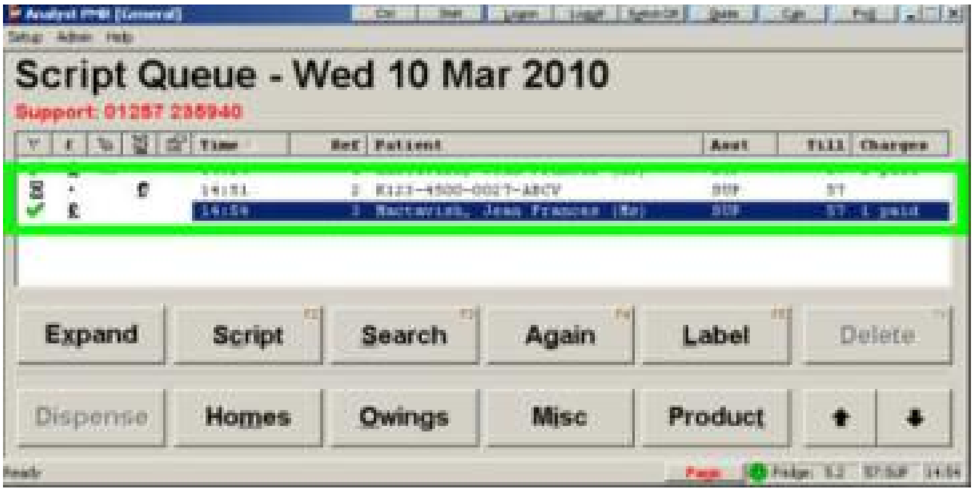
As the patient hasn't been identified by their CHI number you will have to search for them manually. Once identified, dispense to them manually with reference to the GP10.

At the end of the script you'll need to add in the schedule details to complete the claim.

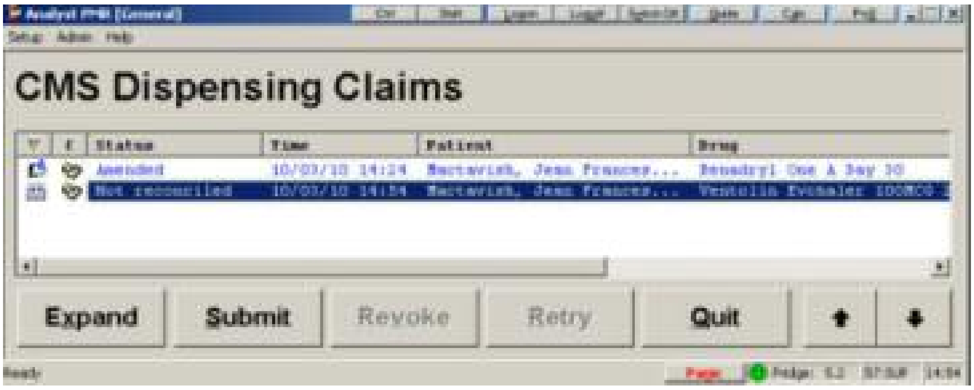


Fill in the details on the screen. The Prescribed date will default to today and the term to 24 weeks. For each item dispensed complete the dose instructions, the TOTAL to dispense quantity over the full term and the frequency.

When complete the session appears on the Script Queue screen in addition to the electronic script request which is now marked as dispensed manually.



The item is listed as 'Not reconciled' in the claims list and until the script is retrieved from the Store it cannot be submitted.



Whether or not the script eventually arrives from the Store it can still be claimed.

Claiming without the script arriving from the Store

Highlight the line in the claims list and click **Submit**.

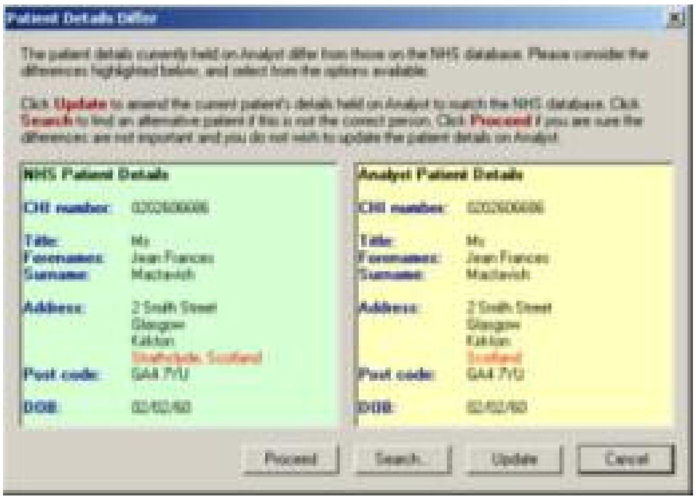
The schedule for each of the dispensed lines will appear.

These are the details you completed when the item was dispensed. Check they are correct and click **OK**. When all lines on the script have been confirmed the claim is submitted.

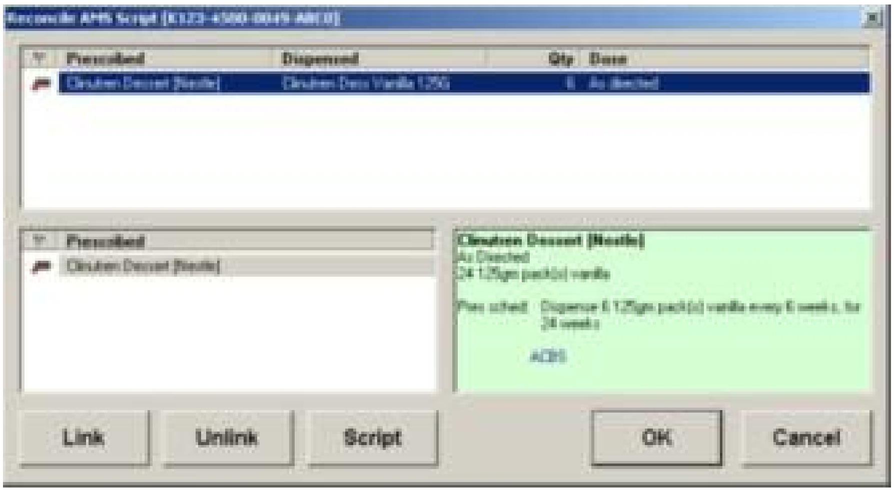
Claiming after the script has finally arrived

If the script does arrive, and you might not know if it has until you claim, the original dispense must be reconciled to the script.

The patient will also need to be reconciled. If the details on Analyst don't match the NHS details a patient update screen appears.



Once updated the items will need to be reconciled.



The items at the top are the items dispensed. The items in the bottom left are those prescribed with the detail of the highlighted item displayed on the bottom right. Analyst make the best effort to link them together, but if any are wrong highlight them and click the **Unlink** button. Then select the correct pair and click **Link**. When correct click **OK**.

The claim is then submitted. The schedule information is not asked about as this is read directly from the script which has now arrived.

Treatment Summary Reports

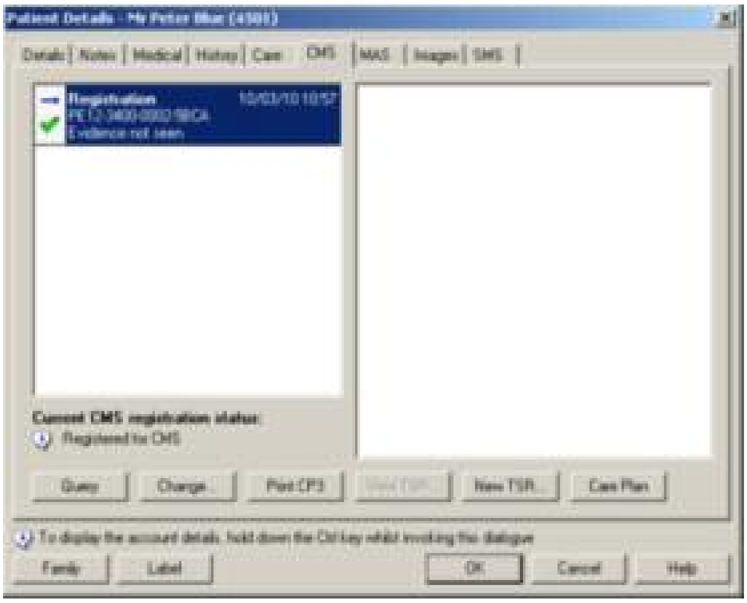
A treatment summary report (TSR) must be returned to the prescriber after 20 weeks of treatment and every 24 weeks thereafter. These must be generated and sent manually.

Identifying Patients Ready for TSRs

Click Setup, Patients, and CMS treatment summary reports.

Displayed is a list of patients with an outstanding requirement for a TSR. Highlight them and click **New** to create and send the report.

Alternatively open the patient's details in the editor and click on the CMS Tab.



Click the **New TSR** button.

Whichever way is used the date dialogue appears.

Select the date range to report on and click **OK**.

The items which have appeared on a CMS script in that period are now displayed. The dispensing history and script associated with teach line can be viewed using the buttons at the bottom.

Select each item in turn and decide whether a new repeat request is required, the date it would be required for and whether any other notes are required. The icons change to reflect what has been done with each line.

	A repeat has not been requested for this item
	A repeat has been requested for this item
	Notes have been added to this item

When complete the report can be viewed using the **View TSR** button and can be sent using the **Send TSR** button.

The report will be sent to the prescriber through the Store in exactly the same format as the View option displays.

Capitation Report

A Capitation Report is available in the Reports side of the PoS (Mgmt) of Analyst. Highlight the report in the list and click **Run**.

Enter the date to query and select which information should be displayed. Click **OK** to run the report.

The summary at the top displays the number of patients that were flagged as 'Registered' and 'Withdrawn' on that day. The details of the individual patients are displayed below.

Index