Electronic Prescription Service – Release 2 User Guide

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Electronic Prescription Services (EPS) – Release 2

What's New in EPS?

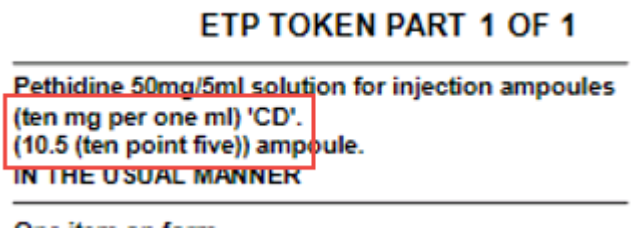
Latest Release

DLM 520 February 2017

The following changes are being made to the Electronic Prescription Services (EPS) as part of the Vision DLM 520 update:

Important - Do not use these settings until authorised to do so by NHS Digital.

- **Schedule 2 and 3 via EPS** - You can now enable the inclusion of acute and repeat issues of schedule 2 and 3 controlled drugs via EPS, see Enabling Schedule 2 and 3 Controlled Drugs for EPS.
- **Schedule 2 and 3 controlled drugs Quantity** - The quantity entered for schedule 2 and 3 controlled drugs automatically prints in both numbers and words preceded by **'CD'**.



- **Schedule 4 and 5 Repeat Dispensing** - It is now possible to issue schedule 4 and 5 controlled drugs via Repeat Dispensing, simply tick **Batch** when adding the therapy.
- **Schedule 2, 3, 4 and 5 controlled drugs on one prescription** - Schedule 2, 3, 4 and 5 controlled drugs now all print on the same prescription, they are no longer split.
- **Recording EPS Exceptions** - If a patient has requested not to receive electronic prescriptions the appropriate Read codes should be added to their medical record. Once added, a paper FP10 prescription is produced, see *Recording EPS Exceptions* (page 61).

Previous Releases

DLM 470 (11/06/2014)

- **Search for Prescription by Unique Identifier** - There is a new option to search for the Prescription ID on the All Prescriptions view. See *Search for Prescription by Unique Identifier* (page 55).
- **Date of Printing and Nomination Details on RHS -** The date of printing and dispensing contractor nomination details are now included on the right hand side of the EPS prescription. See *Prescription Tokens* (page 20).

DLM 460 (10/06/2014)

- **Bug Fix - Bulk Signing Window** - A fix has been made to the Bulk Signing window to ensure that when an item is cancelled from an EPS prescription, the details are viewable on the rejection tab. Also, Consultation Manager no longer crashes when selecting "Print as FP10" from the bulk signing window. See *Bulk Signing - All Prescriptions View* (page 47).
- **Bug Fix** - Electronic prescriptions with Nominated Appliance Contractors no longer disappear from the Prescription Manager screen. See *Nomination* (page 56).
- **Bug Fix** - Individual items from a post dated EPS prescription can no longer be cancelled. See *Post Dating Prescriptions* (page 55).
- **Bug Fix** - Reprocessing ETP messages in transmission error no longer results in the message being duplicated and rejected.

DLM 410 (08/08/12)

3rd Party Nomination Changes

From DLM 410, the following changes have been made to the Preferred and Nominated Pharmacy functionality for EPS2 enabled sites:

- If a patient has a Nominated Pharmacy set up, when EPS2 is enabled the Preferred Pharmacy details are no longer used. The Nominated Pharmacy is used by default for all prescriptions issued to the patient.
- If the patient does not have a Nominated Pharmacy the Preferred Pharmacy details are used by default for all prescriptions issued to this patient. (EPS2 eligibility still applies, in that a patient will not be eligible for EPS2 prescriptions without a nomination prior to EPS2 phase 4.)
- If the Preferred Pharmacy differs from the Nominated Pharmacy an alert is displayed to enable you to notify the patient of the change to their dispensing pharmacy. Once informed the alert can be removed and the Preferred Pharmacy will be subsequently changed to the same details as the Nominated Pharmacy to reflect this.

See *Nomination* (page 56).

DLM 400/401 (28/06/2012)

The introduction of the new Gemscript dm+d Drug dictionary means that the Name Replace Utility does not need to be run prior to upgrading to EPS Release 2 as this should already have been done as part of the DLM 400/401 upgrade when Gemscript was received. Please see DLM 400/401 user guide for further instructions.

DLM 390 (20.12.2011)

Clear Notes on Finalise - You can now clear EPS prescription notes when the prescription is signed in Consultation manager. See *Other Options* (page 78).

DLM 350 (21.07.2011)

England - EPS Release 2 – Phase 3

The following changes have been made to full EPS 2 functionality:

- **Controlled Drug Changes -** All users can now see in the Options-Setup screen from the front screen of Vision, if schedule 2 & 3 and private prescribing are enabled for EPS 2.
- **Cancellation changes**
  - You can now view rejected and cancel failed prescriptions in the bulk signing view - rejections tab.
  - You can now access the cancellation reason, dispenser and dispenser telephone number from Prescription Manager.
- **Bulk Signing changes**
  - **F9 to Sign** - You can now press F9 to sign selected prescription(s) in the workflow list.
  - **Urgent Prescriptions** - Prescriptions marked as urgent are now displayed at the top of the selected patient's drug list in the bulk signing screen with the following urgent icon: .
  - **Prescriptions displayed oldest first** - The order of prescriptions in the patient drugs to sign in the bulk signing screen is now ordered oldest prescription first rather than alphabetical order.
  - **Edit Additional Instructions –** You can now select Edit Additional Instructions from the bulk signing screen after a prescription has been sent to change information for the dispenser.

DLM 320 (23.09.10)-Electronic Prescription Service Release 2 (EPS2)

DLM 320 brings Electronic Prescription Service Release 2 (EPS R2). The roll out of EPS R2 is divided into 3 separate phases which are:

- **EPS 2 - Phase 3 (Deployed Disabled)** – is the default initial setting which behaves as per EPS Release 1 with changes to Prescription Manager and the introduction of Dispensing Contractor Nomination. **This is automatically enabled in DLM 320 for practices using EPS Release 1**. See "*EPS Release 2 - Phase 3 (Deployed Disabled) - Previously EPS 1* (page 13)"
- **Phase 3 –** By default, prescription is electronic with token. The message is legal entity. Your PCT will work closely with your practice to assist you with the transition to EPS R2 Phase 3. **You cannot be enabled for this functionality until you have been instructed by your PCT, who need ministerial approval, to go ahead**. See "*EPS Release 2 – Phase 3* (page 19)".
- **Phase 4 – Phase 4 –** By default, prescription is electronic only. The message is legal entity and you will be able to send prescriptions irrespective of nomination. **Activation details for Phase 4 to be confirmed by NHS Digital**.

Changes for Current EPS R1 Practices (now known as EPS 2 - Phase 3 (Deployed Disabled)):

For practices currently using EPS Release 1, from 320 onwards EPS R1 status is referred to as **EPS 2 - Phase3 (Deployed Disabled)**. EPS R2 functionality is present in 320 but is switched off by default. However, you will notice the following changes in Consultation Manager:

- **Nomination** is a new process used for EPS R2 that gives patients the option to choose, or nominate, a dispensing contractor to which their acute, repeat and repeat dispensing prescriptions can be sent automatically. You can start recording nomination preferences from DLM 320.
- See "Nomination".
- **Prescription Manager**
  - There are new **Prescriber to Sign** and **Assign To** options which replace the Authorised Signatory box.
  - You can **refresh** the item list by pressing
  -

If the patient has no nominated pharmacy, then this will be disabled and unchecked. If the patient has a nominated pharmacy, then this will be checked.
  - There is an option to Add a free text **Prescription Note**: . This displays as a reminder on the patient record. When using EPS phase 3, the notes option is useful for bulk signing.

  See "*Prescription Manager and EPS* (page 66)"
- **Therapy List** -You will see a new symbol **in the drug select list. This is not in use until you receive the EPS 2 DM &D drug dictionary**.

  When you have received the **EPS 2 DM &D** drug dictionary, is displayed when a drug is eligible for EPS messaging and is displayed when a drug is not eligible.

16.08.06 - Any new GP starting at the practice must immediately insert their SSO Smartcard so that their details can be picked up. If this is not done, ETP scripts cannot be produced, and an ordinary script without a bar code is printed instead.

09.06.06 - DLM 202 - Doctor to Sign Prescription now renamed Authorised Signatory on Prescription Manager screen. Every time a clinician is selected in the Authorised Signatory field in the Simple and Active tabs on Prescription Manager, the script types will be updated to suit the clinician's ETP status, ie change between Dual and Paper.

11.05.06 - Revised edition for website.

27.03.06 - DLM 200 - ETP activation (see "*Activation of ETP* (page 11)"). Advanced Printing does NOT need to be switched on before enabling ETP. Explanation of "*Prescription Manager - Errors tab* (page 72)". Filtering of ETP messages in Mail Manager (see "*Prescription Message* (page 79)").

26.01.06 - DLM 195 - There is a new Errors tab in Prescription Manager which shows details of prescriptions that fail to load.

17.11.05 - Introducing **Electronic Prescription Service** (EPS). The Electronic Transmission of Prescriptions (ETP) programme will create and implement the Electronic Prescription Service and then integrate it with the National Care Records Service. The Electronic Prescription Service will operate throughout England. Text updated in line with Health and Social Care Information Centre website. Core ETP renamed ETP Release 1, Full ETP renamed ETP Release 2.

26.10.05 - In ETP, the status of a receptionist issuing a repeat master can result in either Dual or Paper prescriptions. Various scenarios can happen with regards ETP-eligible and non-ETP eligible drugs. See "*Issuing a Repeat Prescription* (page 17)".

25.04.05 - Printing for ETP - Bar Codes and Quality - For the codes printed at the GP practice to be read successfully at the pharmacy, the printing must be of good quality. To ensure this, read the guidelines in Printing for ETP - Bar Codes and Quality.

11.04.05 - Electronic Transmission of Prescriptions (ETP) - Core ETP implemented with new Prescription Manager screen replacing Print Therapy screen.

Electronic Prescription Service Release 2 (EPS2)

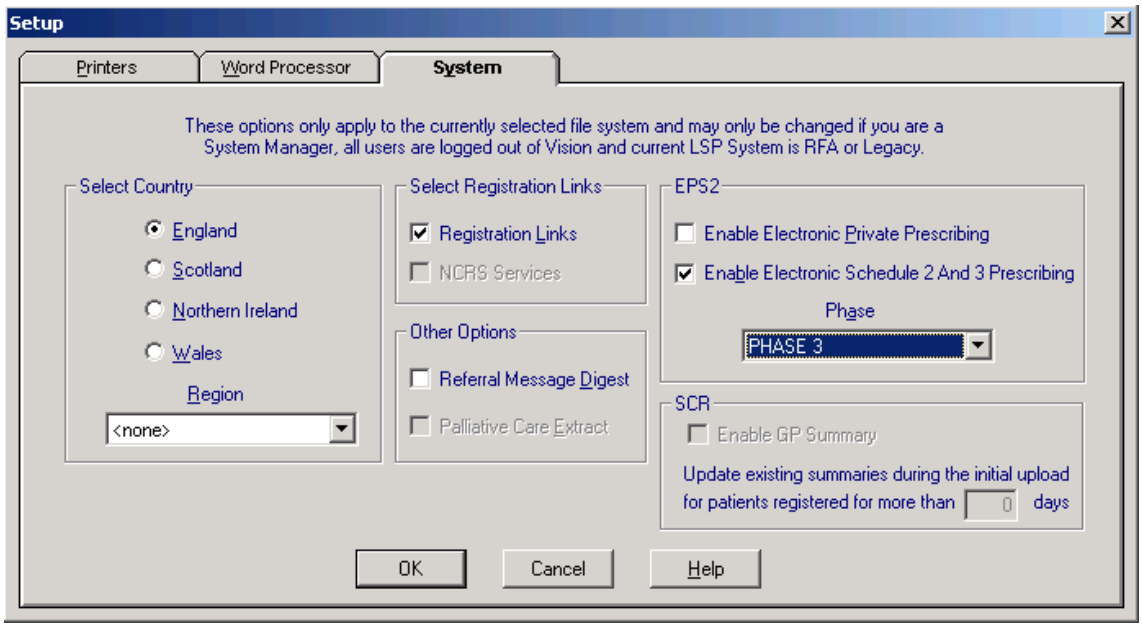
Vision Electronic Prescription Service – Release 2 (EPS R2) is an NHS Digital programme and is a planned major release that builds on the core functionality of EPS 1 software that is already in use in Vision. EPS R2 allows prescribers to generate and transmit electronic prescriptions to a dispenser, such as a pharmacy of a patient's choice, using Vision.

The roll out of EPS R2 is divided into the following available phases:

- **EPS 2 - Phase 3 (Deployed Disabled)** – is the default initial setting which behaves as per EPS Release 1 with changes to Prescription Manager and the addition of Dispensing Contractor Nomination. See *EPS Release 2 - Phase 3 (Deployed Disabled) - Previously EPS 1* (page 13)
- **Phase 3 –** By default, prescription is electronic with token. The message is legal entity. Your CCG will work closely with your practice to assist you with the transition to EPS R2 Phase 3. **You cannot be enabled for this functionality until you have been instructed by your CCG, who need ministerial approval, to go ahead**. See *EPS Release 2 – Phase 3* (page 19).

Activating EPS

1. From the Vision front screen, select **Options – Setup**.
2. Select the **System** tab.



3. In the **EPS2** section, complete as follows:
   - **Enable Electronic Private Prescribing** - Do not tick as it is not yet permitted to send private drugs via EPS.
   - **Enable Electronic Schedule 2 And 3 Prescribing -** You cannot update this option manually. Once the ability to issue acute and repeat schedule 2 and 3 controlled drugs can be sent via EPS it will be updated automatically.
   - **Phase - Select from**
     - **Phase 3 (Deployed Disabled)** - Dual electronic and paper prescribing where the paper is the legal entity.
     - **Phase 3** - Also known as EPS Release 2. Electronic prescription with token. The message is the legal entity. Your practice cannot be enabled for this functionality until you have been instructed by your CCG, who need ministerial approval, to go ahead.
     - **Phase 4** - By default, prescription is electronic only. The message is the legal entity and you will be able to send prescriptions irrespective of nomination. Activation details for Phase 4 to be confirmed by NHS Digital.

> **Note** – Settings saved in **Options – Setup - System** are practice wide.

4. Select **OK** to save the changes.

EPS Release 2 - Phase 3 (Deployed Disabled) - Previously EPS 1

> **Note** - EPS 1 functionality is now referred to as **EPS 2 Phase 3 (Deployed Disabled)**. This is because whilst you are still using release 1 functionality, you can now nominate dispensing contractors and have the software capability to switch to EPS 2 Phase 3 when ready.

The Electronic Prescription Service (EPS) allows prescribers working in primary care settings to generate and transmit electronic prescriptions using their computer system.

The electronic prescription is sent to the Electronic Prescription Service on the Spine, where it can be downloaded by a dispenser who has also upgraded their computer system to use EPS.

EPS Release 1 (known as **EPS 2 Phase 3 (Deployed Disabled)**) is implemented with **dual** or **printed** prescriptions:

- **Dual prescriptions** – This is an unsigned electronic prescription with a signed printed token / FP10. A token looks similar to a paper prescription but has a bar code on it - this allows the pharmacist to obtain details of the prescription from the NCRS. The prescription (token) is printed at the GP surgery and is handed to the patient. At the same time as printing, an XML message is sent to the Spine. Once the pharmacist scans the prescription, the message is retrieved from the Spine and can be dispensed.
- **Paper prescriptions** – Signed FP10s for items that do not fall in the ETP category (see Medication items not eligible for EPS Phase 3).

Changes for practices moving to EPS 2 - Phase 3 (Deployed Disabled)):

For practices previously using EPS Release 1, moving to **EPS 2 - Phase 3 (Deployed Disabled),** full EPS R2 phase 3 functionality is present but is switched off by default. However, the following changes are made in Consultation Manager:

- **Nomination** is a process used for all phases of EPS R2 that gives patients the option to choose, or nominate, a dispensing contractor to which their acute, repeat and repeat dispensing prescriptions can be sent automatically. You can start recording nomination preferences from DLM 320. See Nomination.
- **Prescription Manager**
  - There are **Prescriber to Sign** and **Assign To** options which replace the Authorised Signatory box.
  - You can **refresh** the item list by pressing
  - If the patient has no nominated pharmacy, then this is disabled and unchecked. If the patient has a nominated pharmacy, then this is checked.
  - There is an option to Add a free text **Prescription Note**: . This displays as a reminder on the patient record. When using EPS phase 3, the notes option is useful for bulk signing.

  See *Prescription Manager and EPS* (page 66)

- **Therapy List** -You will see a symbol **in the drug select list.** is displayed when a drug is eligible for EPS messaging and is displayed when a drug is not eligible.

Prescription Token

In ETP R2 - Phase 3 (Deployed Disabled), the prescription form is called a token. A token is printed on FP10 stationery, the only difference being a barcode which is placed down part of the right-hand side. The barcode represents a unique code to identify the prescription. It contains no personal information. It links the patient with a unique prescription within the prescription database and enables any pharmacy to retrieve their electronic prescription. Alongside the bar code is an alphanumeric code which is unique to that script.

This token (prescription) is printed at the same time as the message is sent. The GP should first sign the token before handing it to the patient.

> **Note** - It is extremely important to print the prescription with a printer that has an adequate toner cartridge so that the bar code prints clearly. If not, scanning of the prescription token is impeded and thus the whole process jeopardised. Printing must be done on a laser printer with a print quality of at least 600 dpi (not 300 dpi).

Points to Note

- EPS 1 functionality is referred to EPS 2 Phase 3 (Deployed Disabled). This is because whilst you are still using release 1 functionality, you have the ability to switch to EPS 2 Phase 3 when ready.
- Mail Manager has filters to hide successful EPS messages from view (in Mail Manager, go to **Tools - Options - Message** tab - **Show Sent Electronic Prescriptions**). If you are EPS enabled, we recommend that you leave this option **unticked** so that only unsuccessful/error messages are displayed, as this improves performance and declutters your screen. If this option is ticked, all messages including sent and complete EPS messages are displayed.
- Staff need to use their Smartcards for barcoded prescriptions to be produced. However, not all prescriptions produced have barcodes (some items, e.g. appliances, are not eligible for EPS).
- Vision determines if a prescription can be printed with a barcode and how items are grouped together on prescriptions.
- Items issued BEFORE EPS switch-on cannot be reprinted; they have to be reissued. Items issued AFTER EPS switch-on can be reprinted as normal.
- Repeat masters issued before EPS switch-on are still usable as before.
- EPS and non-EPS items are printed on separate FP10's. **You may get more than one prescription printed whereas before you would only get one.**
- NHS number is now printed on the prescription.
- The printed and signed FP10, with or without barcode, is still the legal entity from which items are dispensed.

- The Rejected tab shows where the EPS system has found a technical, not clinical, problem with the message. Please tell us if you see anything in the Rejected tab.

New Prescribers Joining the Practice

When a new GP joins the practice, it is important that his Smartcard is inserted for SSO immediately so details can be picked up. Ideally this would happen at the same time as any outgoing GP is deactivated.

Until a new GP signs on with his Smartcard, then prescriptions are printed without barcodes, ie they are not EPS scripts.

Adding New Acute Medication

For EPS 2 Phase 3 (Deployed Disabled), you can add an acute as follows:

1. From **Consultation Manager**, use **Therapy Add** in the usual way to add the medication.
2. Double click in **Drug Name** to access the **Drug Select** screen. You can check that the medication is part of EPS by looking at the Product Information in the bottom pane (use the down scroll arrow to reach this). If it has a DM+D mapping, then it can be included in EPS, with certain exceptions - see Medication items not eligible for EPS.
3. Select **OK** to complete Therapy Add.
4. Press F9 or select **Print** .
5. On the Prescription Manager screen (See *Prescription Manager and EPS* (page 66)), any acute medications added today are selected by default.
6. Select **Finalise** or press F9.
7. The prescription is printed, and the EPS message sent off, if the item is eligible for EPS.

Therapy Not Eligible for EPS Phase 3 (Deployed Disabled)

- Controlled drugs from Schedule 1.
- Therapy that are not to be printed on the left-hand side. This includes private prescriptions and non-FP10 drugs, discontinued drugs, non-drug therapies.
- Drugs without a DM+D code mapping. On the Drug Select screen, you can check that the prescribed item is part of EPS by looking at the Product Information. If it has a DM+D mapping, then it can be included in EPS. (DM+D stands for **Dictionary of Medicines and Devices** defined as "The source of terminology and a common health language for medicines and devices used in healthcare. Standard coding scheme for the exchange of information regarding medicines and devices.").
- PA Practice administered are not part of EPS, therefore at present, print as paper prescriptions only.
- Batch prescriptions for controlled drugs from Schedule 1, 2 and 3.
- Devices and appliances, even those with DM&D codes.

Issuing a Repeat Prescription

For EPS 2 Phase 3 (Deployed Disabled), you can issue a repeat as follows:

1. If a receptionist is printing repeat prescriptions on behalf of the GP, then s/he should sign on using SSO with the Smartcard.
2. In Consultation Manager, select the patient.
3. On the Therapy Repeats list, select the repeat medication you want issued.
4. Press F9 or click on **Print** .
5. On the Prescription Manager screen (see *Prescription Manager and EPS* (page 66)), you can right click on the selected item and change the status from non-urgent to urgent:
   - **Non-urgent** - when you click on Print/Finalise, the prescription is printed, and the message is sent when you deselect the patient at finishing the consultation.
   - **Urgent** - when you select on Print/Finalise, the prescription is printed, and the message is sent immediately.
6. The repeat issue and all acutes added the same today are also automatically selected. You can select or deselect an item by removing or adding a tick in the second column from the left.
7. Select Print/Finalise or press F9.
8. The prescription token is printed, and the EPS message sent off either immediately, or on deselecting the patient, depending on the urgent or non-urgent status selected.

Please note the following:

- If a doctor, who has NOT signed in with their Smartcard and creates a repeat master which happens to be an EPS eligible drug, then if a receptionist (who has activated EPS) will get a warning when they select the repeat master and issue against it: *The clinician selected to sign these prescriptions is not correctly configured to send electronic prescriptions. To use this clinician, change all prescriptions to be*

printed to Paper prescriptions before proceeding. Right click on the line(s) to change from dual (electronic) prescriptions to paper prescriptions.

- Every time a clinician is selected in the Authorised Signatory field in the Simple and Active tabs on Prescription Manager, the script types will be updated to suit the clinician's EPS status. So if someone who is set up for EPS is selected, any items that can be dual will be switched to dual. If the person cannot do EPS, all items will be set to paper. When a different clinician is selected, the item selections will not change, even if the new person is able to sign more items. This is because the user may have already selected all the items they want to print and they will not want to have to redo that.

- If the prescription is set to **Dual** and the Authorised Signatory/Assigned To clinician is the non-SSO GP, then when they select and try to print the item, they are told that it cannot be done: *The signer details are invalid. The signer must (1) Be a prescriber (2) Have a valid role for sending prescriptions (3) Have a valid Unique Identifier (SOS Id) (4) Be assigned a default authorising role.* Changing the prescription to **Paper** stops this.

EPS Release 2 - Phase 3

EPS Release 2 – Phase 3

Vision Electronic Prescription Service – Release 2 (EPS R2) is a major release that builds on the core functionality of EPS 1 software that is already in use in Vision. EPS R2 allows prescribers to generate and transmit electronic prescriptions to a dispenser, such as a pharmacy of a patient's choice, using their Vision application. **EPS R2 is an NHS Digital programme** which delivers the following enhancements to prescribing in Vision:

- **Nomination of dispensers** - Patients can nominate a dispenser to receive their electronic prescriptions automatically. See *Nomination* (page 56).
- **Use of advanced electronic signature on electronic prescriptions** –This means that prescribers can apply an advanced electronic signature to the electronic prescription message, making the message the legal prescription. See *Signing Prescriptions - Overview for Prescribers* (page 32).
- **Bulk signing** – You can apply an advanced electronic signature to multiple prescriptions for multiple patients in a single operation. This process encapsulates all existing procedures that occur in the paper based process. A new **All Prescriptions View** in Consultation Manager provides a multi-patient view of prescriptions, allowing bulk signing, prescription view and summaries of rejections. See *Bulk Signing - Overview* (page 35)
- **Electronic repeat dispensing** – You can use EPS to generate repeatable prescriptions electronically. Unlike conventional paper-based repeat dispensing, electronic repeat dispensing is possible from a single electronic prescription message. See *Electronic Repeat Dispensing* (page 38).
- **Electronic cancellation** – You can cancel electronic prescriptions at any point up until they are downloaded at the dispensary contractor site. See *Electronic Cancellation* (page 41).
- **Addition of RHS items** – Items which normally print on the right hand side of a prescription are now included in the electronic message, along with any clinical message from the prescriber to patient.

Differences between EPS 1 and 2

The table below shows the basic differences between EPS release 1 and fully implemented EPS release 2 functionality.

Function	EPS R1	EPS R2
Electronic transmission of prescription data between prescriber and dispenser	Yes	**Yes**
Barcode printed on paper	Yes	**Yes (where required)**
Printing of prescription token	No (paper prescription is still required)	**Yes (where required and for Repeat Dispensing)**
Electronic Repeat dispensing	Yes	**Yes**
Release/return of prescription message	No	**Yes**
Cancellation of prescription	No	**Yes**
Digital signing of prescription messages	No	**Yes**
Patient nomination of preferred pharmacy	No	**Yes**
Electronic reimbursement claim (pharmacy)	No	**Yes**

Prescription Tokens

Paper copies of electronic prescriptions are called 'tokens'. They act as a hard copy of the details contained within the electronic prescription. There are two types of token, known as 'prescription tokens' which are produced by the practice and print on FP10s and 'dispensing tokens' which are produced by the pharmacy and print on an FP10.

For EPS 2, a prescription token must accompany an electronic prescription in the following situations:

- at the start of a repeat dispensing regime
- where clinical information needs to be communicated to the patient
- at a patient's request
- if the prescriber deems it necessary to do so

The Nominated Pharmacy and the Prescription ID prints on the right hand-side of the script along with any other repeat reorder information you have set-up in Consultation Manager.

EPS R2 Phases

The roll out of EPS R2 is divided into 3 separate phases which determine how prescriptions are produced (ie electronic/dual).

- **Phase 3 (Deployed Disabled)** – is the default initial setting which behaves as per EPS R1 with the following additional functions available:

  – Nomination of dispensing contractors.

  – By default, prescription is Dual – paper is legal entity.

  – Prescription Manager changes.

  Phase 3 (Deployed Disabled) is automatically enabled for existing EPS 1 practices as part of DLM 320.

- **Phase 3** – By default, prescription is electronic with token. The message is legal entity. Your CCG will work closely with your practice to assist you with the transition to EPS R2 Phase 3.
- **Phase 4 –** By default, prescription is electronic only. The message is legal entity and you are able to send prescriptions irrespective of nomination. **Activation details for Phase 4 to be confirmed by NHS Digital**.

Prerequisites for EPS R2 – Phase 3

In order to use EPS R2 - Phase 3, you must:

- Have been instructed by your CCG to go ahead.
- Have the relevant **RBAC** roles programmed onto your Smartcard (the RBAC user guide).

Role Based Access (RBAC)

As with all Spine services, access to EPS is controlled through the use of Smartcards and a Smartcard passcode. This gives the individual users different levels of access to Vision depending on their role registered on the Smartcard.

Previously, the role on your Smartcard did not have great bearing on your access to Vision, eg you needed a specific role to use Choose and Book, but access to other functions was set in **Control Panel – Security**. From now on, the role(s) and function(s) logged on your Smartcard dictate your access rights in Vision. Please ensure that you have the correct roles entered on your Smartcard. This is done via your Registration Authority.

> **Note** - When RBAC is enabled, in Mail Manager, you can only allocate messages to users that have logged in once since RBAC was switched on.

Please see the Role Based Access (RBAC) user guides for further information.

Introduction to EPS R2 Phase 3 in Vision

There are three main prescribing models applicable to EPS R2: **Acute Issues, Repeat Issues and Electronic Repeat Dispensing**. The processes for these models are detailed in the Prescribing Models section. It is advised that you decide on the best management of each prescribing model for your practice before EPS R2 is implemented. You need to consider the following:

- How you currently manage prescriptions in your practice
- How are you going to manage administrative and clinical roles with EPS R2 replacing the need for paper?
- How are you going to manage nomination?
- How are you going to use repeat dispensing?

Most of the EPS R2 Phase 3 functionality in Vision can be found in the following sections in Consultation Manager:

- **Nomination Management View** – allows you to record the patient's nominated dispensing contractor. See Nomination.
- **Prescription Manager** – provides access to all prescription-specific information for the selected patient. See *Prescription Manager and EPS* (page 66).
- **All Prescriptions View –** provides a multi-patient view of prescriptions. All prescriptions view gives access to bulk signing, workload processing, and rejection summaries See All Prescriptions View.

Prescribing Models

There are two prescribing models available to EPS R2: *Acute and Repeat Issues* (page 23) and *Repeat Dispensing* (page 24).

Acute and Repeat Issues

Acute and repeat issues for Release 2 are dealt in a similar way to paper prescribing, though the workflows that produce these are very different. With EPS R2 fully enabled, there are four possible scenarios how prescriptions are produced (this depends on nomination status, whether drugs are mapped to DM+D etc):

- **Scenario 1** – The GP prints a FP10, signs it and gives a paper copy to the patient. The patient visits the Pharmacy with a normal FP10.
- **Scenario 2** – The GP produces a prescription which is sent electronically to the Spine for the pharmacy to download. A bar coded prescription is printed, signed and given to the patient. The patient presents the signed prescription to the Pharmacy which is the legal entity.
- **Scenario 3** – The GP produces an electronic prescription which is digitally signed. An electronic message is sent electronically to the Spine for the pharmacy to download. A token is printed for the patient but not signed by the GP as the message is the legal entity.
- **Scenario 4** – The GP produces a prescription, digitally signs it and an electronic message is sent electronically to the Spine for the pharmacy to download. No token is printed for the patient as the message is the legal entity.

See *Signing Prescriptions - Overview for Prescribers* (page 32).

Electronic Repeat Dispensing

EPS R2 allows you to generate prescriptions for repeat dispensing. Unlike conventional paper-based repeat dispensing, electronic repeat dispensing is possible from a single electronic prescription message, with prescribers able to apply an advanced electronic signature to, and therefore authorise a specific number of issues.

At the start of a repeat dispensing cycle, the patient is given a prescription token. This can then be taken to any ETP 2 enabled pharmacy in order to obtain the first and subsequent issues of their medication.

> **Note** - If a patient has nominated a pharmacy and they wish to change it part way through a repeat dispensing cycle, all repeatable prescription issues that have not been downloaded are transferred to the new nominated pharmacy.

See *Electronic Repeat Dispensing* (page 38).

Business Processes

EPS R2 brings a different approach to issuing and signing prescriptions whereby paper prescriptions are potentially non-existent. There are several processes for *Clinicians* (page 24) and *Admin Staff* (page 27).

Clinician

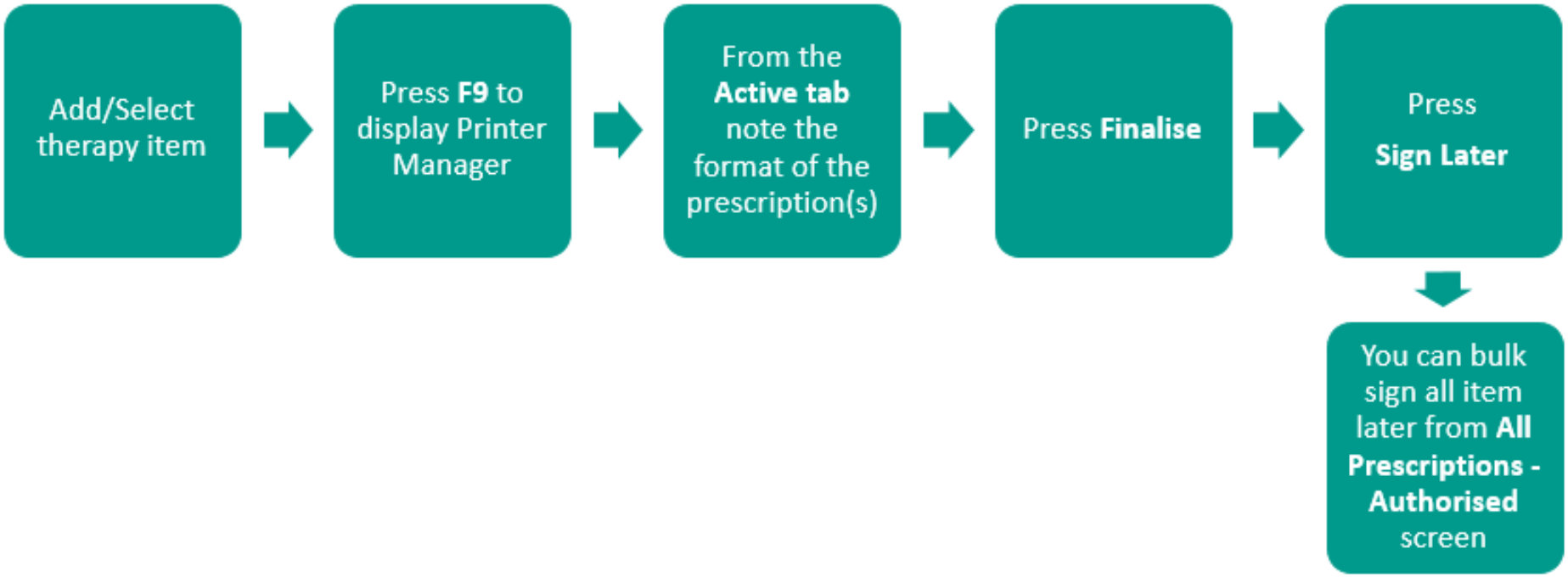
Issue and sign now

You can choose to issue and electronically sign and send ETP 2 prescriptions from the individual patient record in Consultation Manager. The process is as follows:

See *Signing Prescriptions – Overview for Prescribers* (page 32).

Issue and sign later

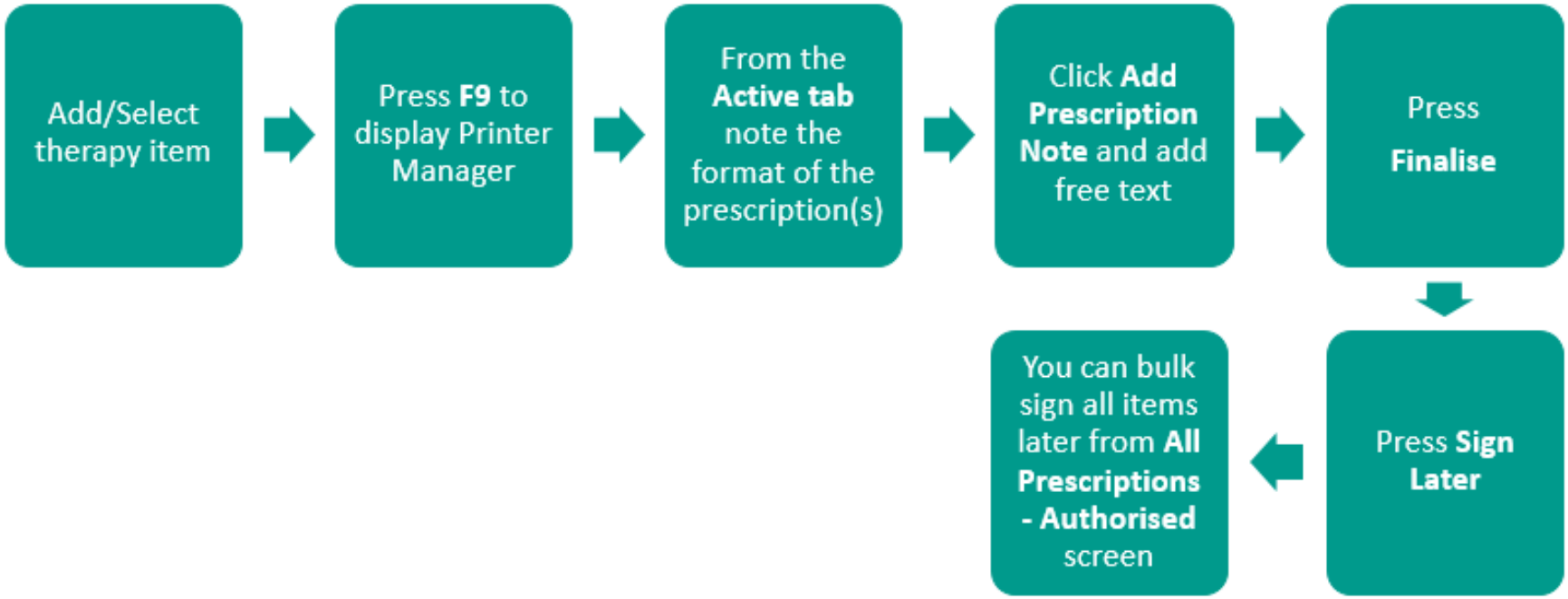
You can choose to issue a prescription now, but electronically sign and send ETP 2 prescriptions later via bulk signing. Bulk signing is accessed from the new All Prescriptions view in Consultation Manager. The process is as follows:



See *Signing Prescriptions – Overview for Prescribers* (page 32) and *Bulk Signing – Overview* (page 35).

Need review before signing

You can choose to issue a prescription now, add a prescription message and select to sign later. This means that the item can be reviewed and electronically signed at a later stage via bulk signing. The process is as follows:



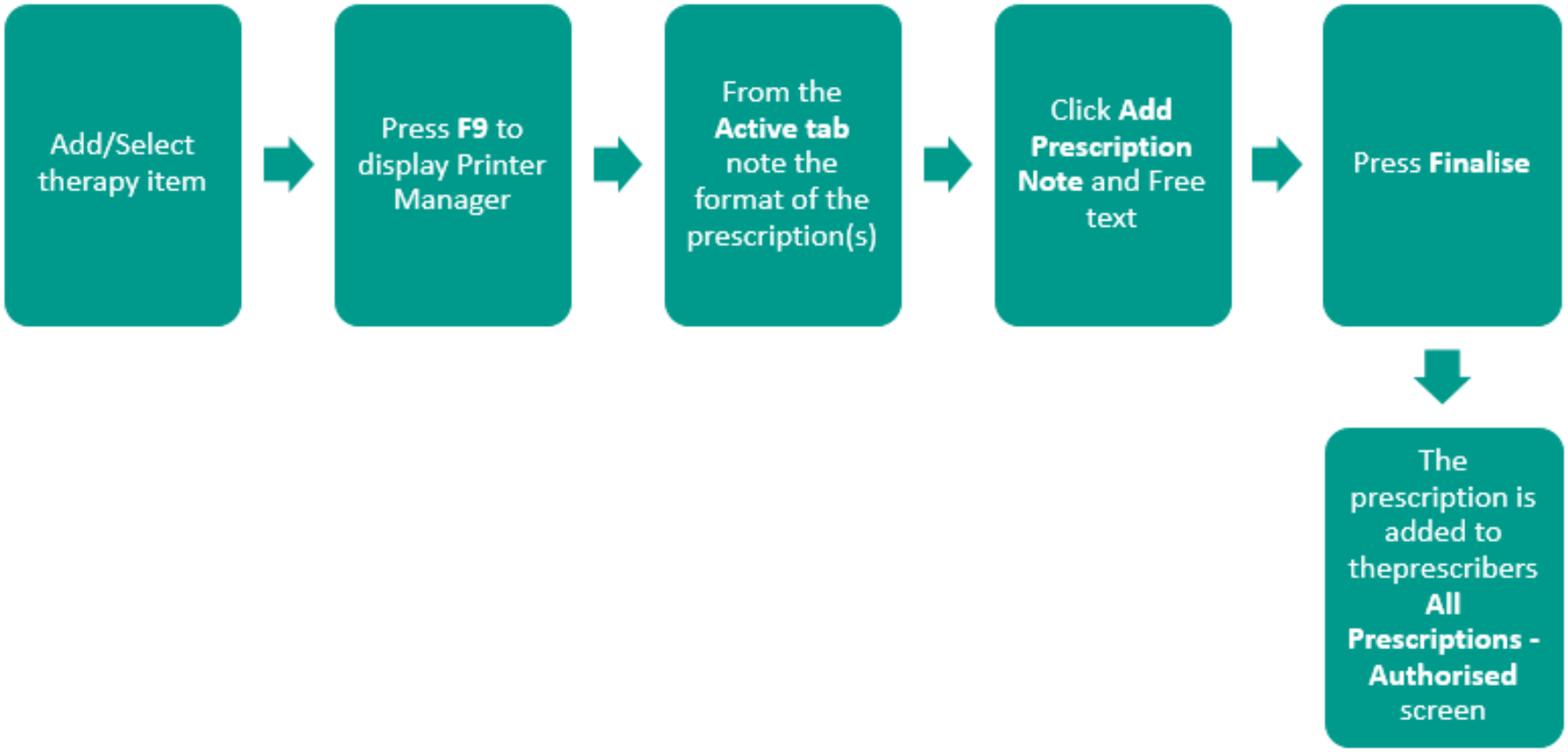
See *Signing Prescriptions – Overview for Prescribers* (page 32) and *Review Required - Overview* (page 36).

Admin staff

Issue and send to prescriber for signing

See "*Issuing Prescriptions – Overview for Administrative Staff* (page 30)".

Issue and send to prescriber for review



Note – Please bear in mind that Vision automatically decides how the prescription items are issued (ie electronic, electronic +token, dual and paper. It is possible that one patient could receive a mixture of printed and electronic items). If an item cannot be mapped to DM+D, it is printed on FP10 paper; other items ordered at the same time could be sent electronically. You need to decide how this scenario is managed within your practice.

Re-ordering Repeat Prescriptions

Once nomination has been recorded, patients should continue to re-order their repeat prescriptions from your surgery in the same way as normal. However, instead of having to make arrangements to collect the prescription from you, the prescription is sent electronically to the contractor they have nominated.

SLS Endorsing

For NHS prescribing, certain items can only be prescribed as NHS prescriptions if they comply with specific criteria. Such items are endorsed with "SLS" on the prescription form. Vision automatically does this for you.

However, some items which require SLS endorsement belong to more than one action group (ie Clobazam belongs to both Control of Epilepsy and Anxiolytics action groups). Vision endorses the prescription with "SLS" regardless of the action group. This is because SLS items for NHS prescribing are linked to the drug item and not the action group selected in Vision. Where prescribing falls outside of the SLS regulations, the item may not be prescribed on the NHS. If prescribing items listed in Part XVIIIB of the Drug Tariff for conditions other than the stated purpose, the prescriber must manually amend the medication item to a private prescription.

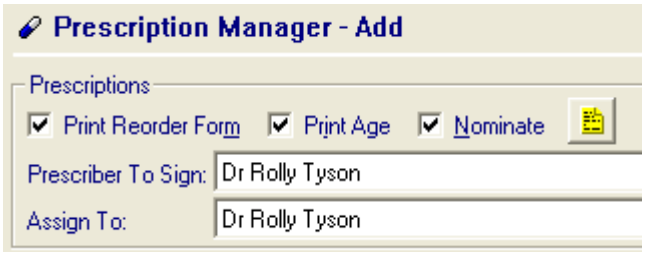
EPS R2 and Imported GP2GP Repeats

Once you are enabled for EPS2, it is advised that you do not reauthorise repeat items which have been received via GP2GP messages. Instead, we recommend that you re-enter any required repeat items. This is to avoid the process of trying to convert the GP2GP therapy items to match DM+D.

Issuing Prescriptions - Overview for Administrative Staff

The steps below provide an overview for administrative staff for issuing and allocating electronic prescriptions. See "*Prescription Manager and EPS* (page 66)" for more detailed information on Prescription Manager.

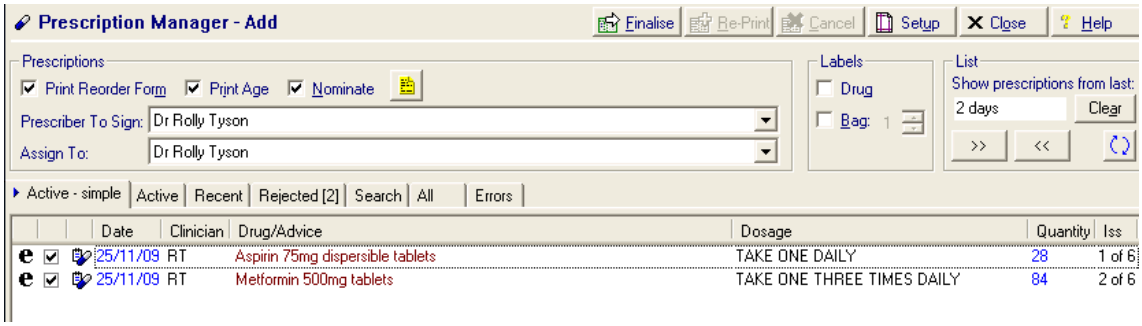
1. From **Consultation Manager**, select the patient.
2. Select the **Therapy** tab and add or issue the acute/repeat therapy as usual.
3. Press **F9** to display **Prescription Manager**. Check the details in this screen. You might like to change the following:



Prescriber To Sign - A single prescriber is selected during any given print or ETP operation. This prescriber is set as the author within the prescription message, and is required to re-authenticate their Smartcard passcode during the signing process.

Assign To - This denotes the intended member of staff who is next in line to process the prescriptions. This defaults to be the same as the signer, though it is possible to assign the patient's prescriptions to another member of staff if required. The selection is stored against the prescription record and used by the bulk prescribing view to produce the list of prescriptions to process.

Prescription Notes - Allows you to add a note to be conveyed to the prescriber in the All Prescriptions screen. Typically, this holds details of a requested change to the prescribed items. This also uses the existing Vision reminders system and is displayed alongside other reminders in the usual way.



4. It is advised that you also check the type of prescription that has been generated:

- **Electronic** signed electronic message. The message is the legal entity.
- **Electronic +Token** - For if the patient requires a paper copy of the electronic prescription. The message is the legal entity.
- **Dual** - a single ETP message and dual signed script/token. Paper is the legal entity.

- **Paper** (signed script only, eg FP10) - this is the only icon you can see if ETP is not enabled. Paper is the legal entity.

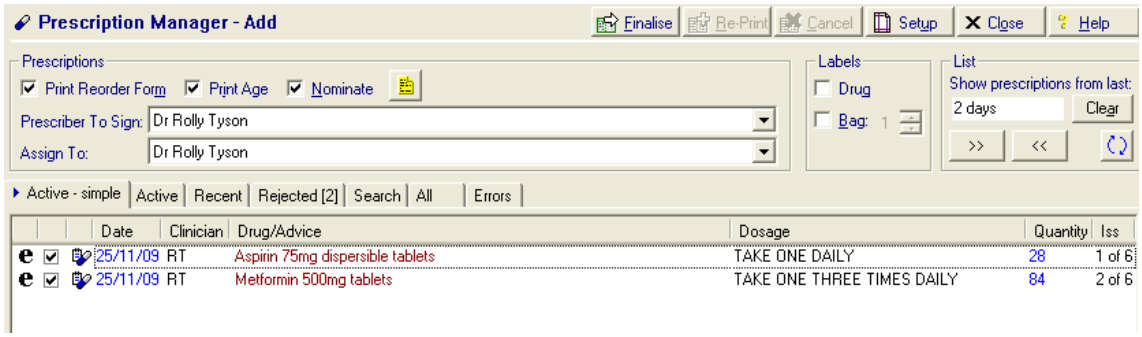
Note – Please bear in mind that Vision automatically decides how the prescription items are issued (ie electronic, electronic +token, dual and paper.) It is possible that one patient could receive a mixture of printed and electronic items. If an item cannot be mapped to DM+D, it is printed on FP10 paper; other items ordered at the same time could be sent electronically. You need to decide how this scenario is managed within your practice.

5. Select **Finalise**.
6. The electronic prescriptions are sent to the prescriber for signing. These are found in **Consultation Manager - All Prescriptions – Authorised**, or **All Prescriptions - Review Required**, if a note has been added or an item was on its last issue.

Signing Prescriptions - Overview for Prescribers

The steps below provide an overview for prescribers for digitally signing prescriptions after they have been issued from Consultation Manager. You have the option to sign now or sign later. See *Prescription Manager and EPS* (page 66) for more detailed information.

1. From **Consultation Manager**, select the patient.
2. Select the **Therapy** tab and add or issue the therapy as usual. See *Select Drug List* (page 34) for icon changes.
3. Press **F9** to display **Prescription Manager**. Check the details in this screen.

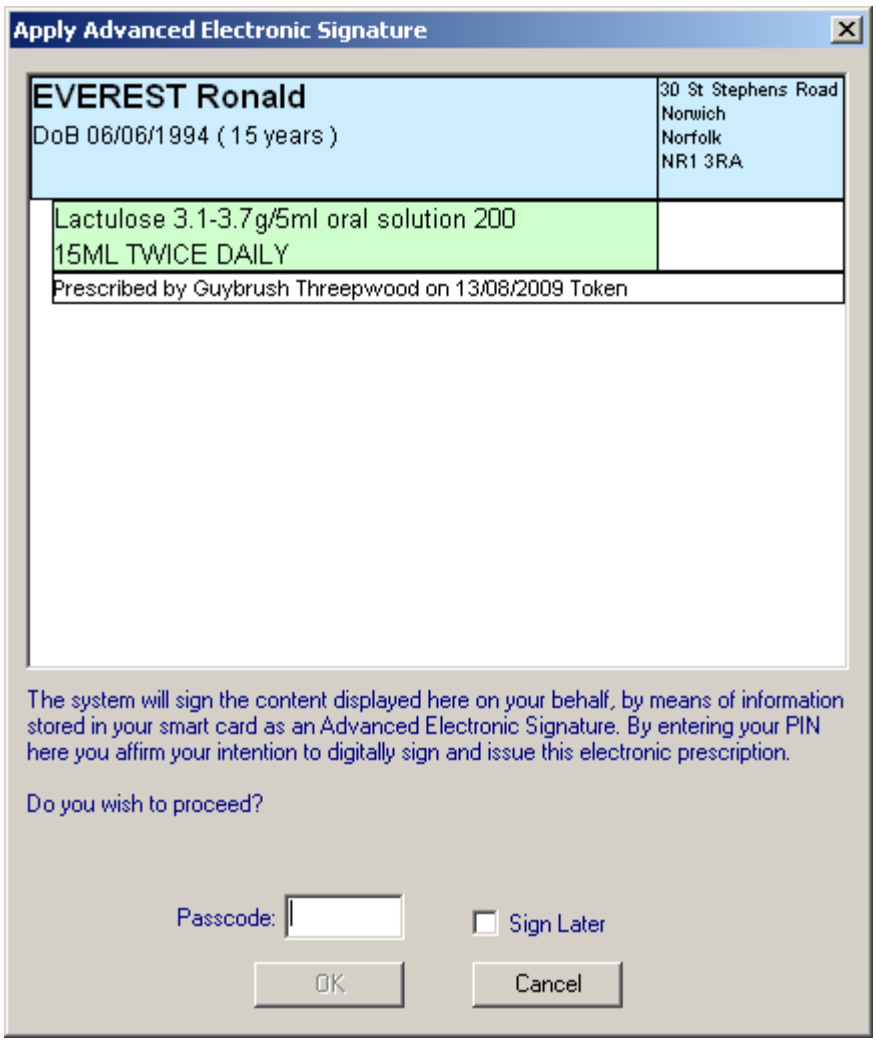


4. It is advised that you also check the type of prescription that has been generated:
   - **Electronic** signed electronic message. The message is the legal entity.
   - **Electronic +Token** - For if the patient requires paper or Repeat Dispensed items. The message is the legal entity.
   - **Dual** - a single ETP message and dual signed script/token. Paper is the legal entity.
   - **Paper** (signed script only, eg FP10) - this is the only icon you see if ETP is not enabled. Paper is the legal entity.
5. Press **Finalise**.

Note – Only prescribers are able to electronically sign prescriptions. Admin staff can issue and finalise prescriptions but these are forwarded to the allocated Prescriber To Sign and/or Assigned To clinician.

Sign Now

Next, you are prompted with the **Apply Advanced Electronic Signature** window. Review the patient and drug details, then enter your Smartcard passcode to sign the prescription now.



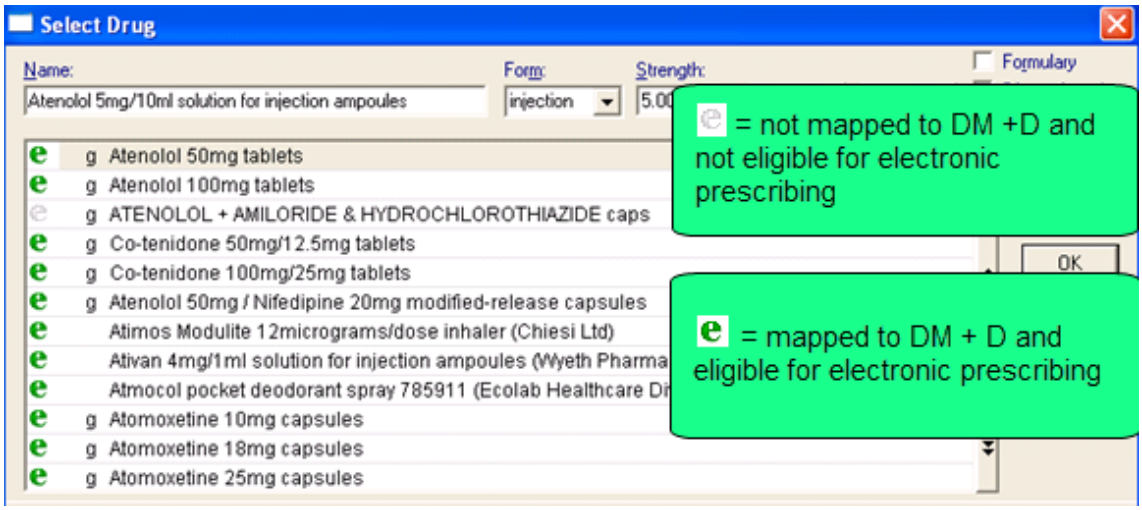
Sign Later

Alternatively, instead of entering your Passcode to sign now, you can tick **Sign Later** and select **OK**. This does not send the prescription now, but adds the prescription to the **All Prescriptions** screen where you can sign and/or review your prescriptions in bulk at a later date.

6. Select **OK** to continue. The prescription message is sent to the Spine.

Select Drug List

As long as you have run the DM+D mapping utility, adding prescription items to the patient record for EPS R2 is carried out in Consultation Manager as per usual. The only difference you might notice is the appearance of ℮ next to the drug name and description in the Select Drug screen. When the symbol is inactive, it means that the item has not been mapped to DM +D and that it is out of scope for electronic prescribing.



Not Eligible for EPS R2

Prescribing is not possible for the following patients:

- Patients who are deceased.
- Patients who are not synchronised with PDS.
- Patients who are marked as "sensitive" on PDS.
- Patients who have requested not to receive electronic prescriptions, see *Recording EPS Exceptions* (page 61).

The following medication is **not** eligible for **electronic + token** prescriptions:

- Controlled drugs from schedule 1.
- Controlled drugs from schedule 2 and 3 unless this has been enabled in the system.
- Private prescriptions, unless this has been enabled in the system.
- Drugs without a DM+D code mapping.
- Drugs without a DM+D description and unit.
- Prescriptions without a nomination in Phase 3.

Note - Electronic prescriptions can only be produced without a token for patients who have **nominated** who meet the above requirements.

The following medications are **not** eligible for **dual** prescriptions:

- Controlled drugs from schedules 1, 2, and 3.
- Drugs without a DM+D code mapping.
- Drugs without a DM+D description and unit (phases 3 and 4).

- Private prescriptions.
- Dual prescriptions are not available in Phase 4.

Therapies with the following characteristics are **not** eligible for **electronic repeatable** prescriptions:

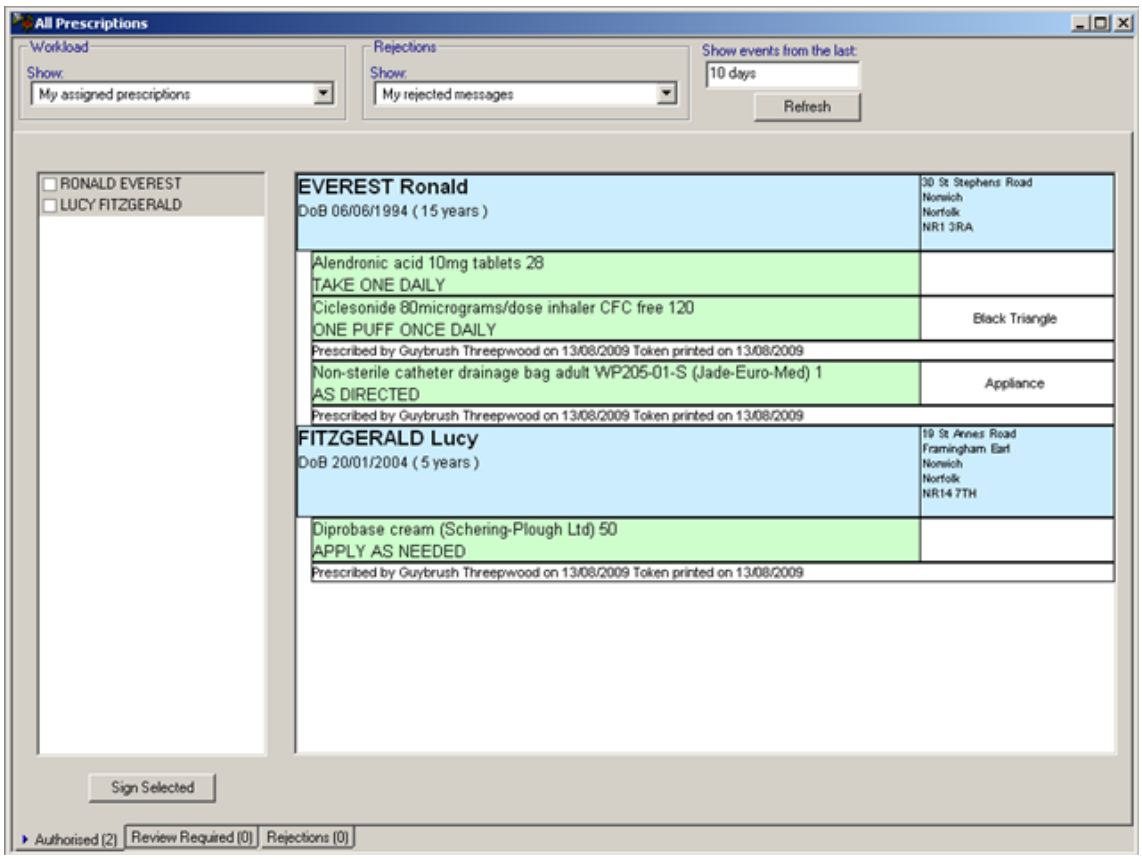
- Controlled drugs from Schedule 2, and 3

Bulk Signing - Overview

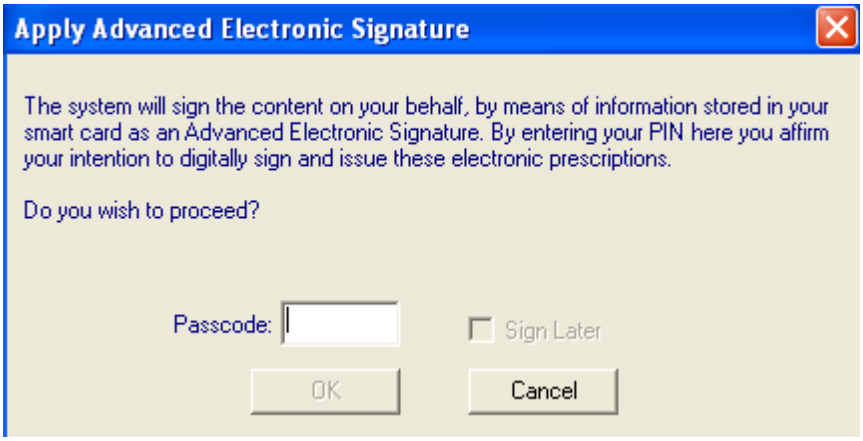
The Authorised tab lists patients and prescriptions which have been marked for signing later. This tab is accessible to prescribers only and **it is advised that you check this at the end of each surgery session**. From here you can review and sign prescriptions individual or multiple prescriptions.

To process your prescriptions:

1. From **Consultation Manager**, select .
2. **List All Prescriptions** icon (you do not have to have a patient selected to access this screen).
3. Select the **Authorised** tab to display unsigned prescriptions assigned to you in the last 10 days (depending on your filter settings).
4. Select the required patients in the list, their demographics and prescription details are listed in the display screen.
5. When you have checked each prescription (you must make sure you scroll down to the bottom of the list), select **Sign Selected**.



6. You are prompted to enter your Smartcard passcode.



7. Enter your passcode and select **OK**.
8. Vision then starts to digitally sign and send the prescriptions for the selected patients. The following screen displays whilst this is happening and shows the patient and prescription details as they are being processed:

Note – If you select **Cancel** to halt the operation, the process is aborted after the current prescription is processed and no further prescriptions are sent.

9. The prescriptions that have just been signed are now cleared from this view.

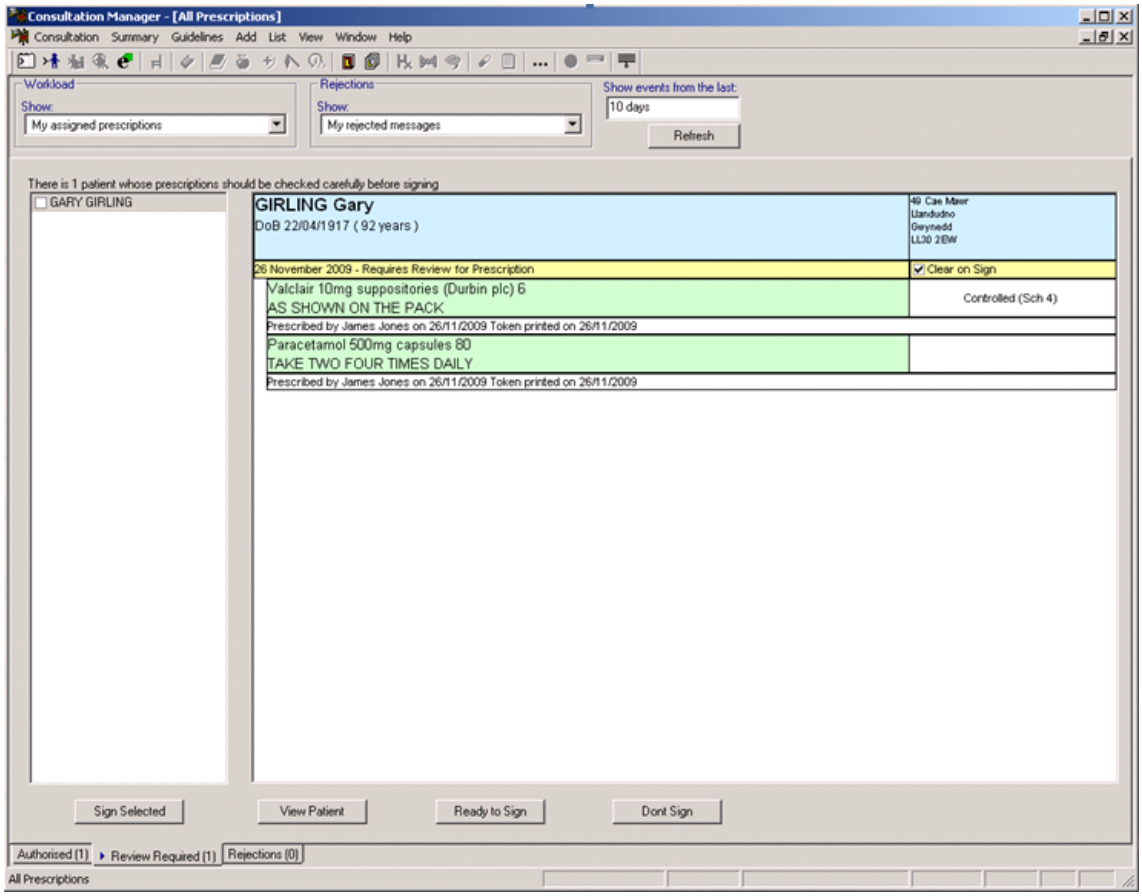
See *All Prescriptions View* (page 47) for further information.

Review Required - Overview

The **Review Required** tab in All Prescriptions View list prescriptions which require a more detailed review before signing. These include:

- Items which have a prescription note (these can be added by administrative staff) or
- Items which are on the final issue of a repeat master.

1. From **Consultation Manager**, select .
2. **List All Prescriptions** icon (you do not need to have a patient selected to access this screen).
3. Select the **Review Required** tab to display prescriptions assigned to you in the last 10 days (depending on your filter settings) which need review before signing.
4. Select the required patients in the list, their demographics and prescription details are listed in the display screen.
5. You have the following options to pick from:
   - **Sign Selected** – Allows you to sign all the prescriptions for the selected patients in the list. Once you have done this, the patient names are removed from the review required list
   - **View Patient (Ctrl O)** – Opens the patient record in Consultation Manager. A consultation is not started regardless of your Consultation Manager settings.
   - **Ready to Sign (Ctrl S)** – Selects/ticks the highlighted patient name. This is not enabled unless you have scrolled to the bottom of the prescription list for the patient where relevant.
   - **Don't Sign (Delete)** – Deselects/unticks the highlighted patient name and moves to the next patient. This does not delete the item from the patient record.

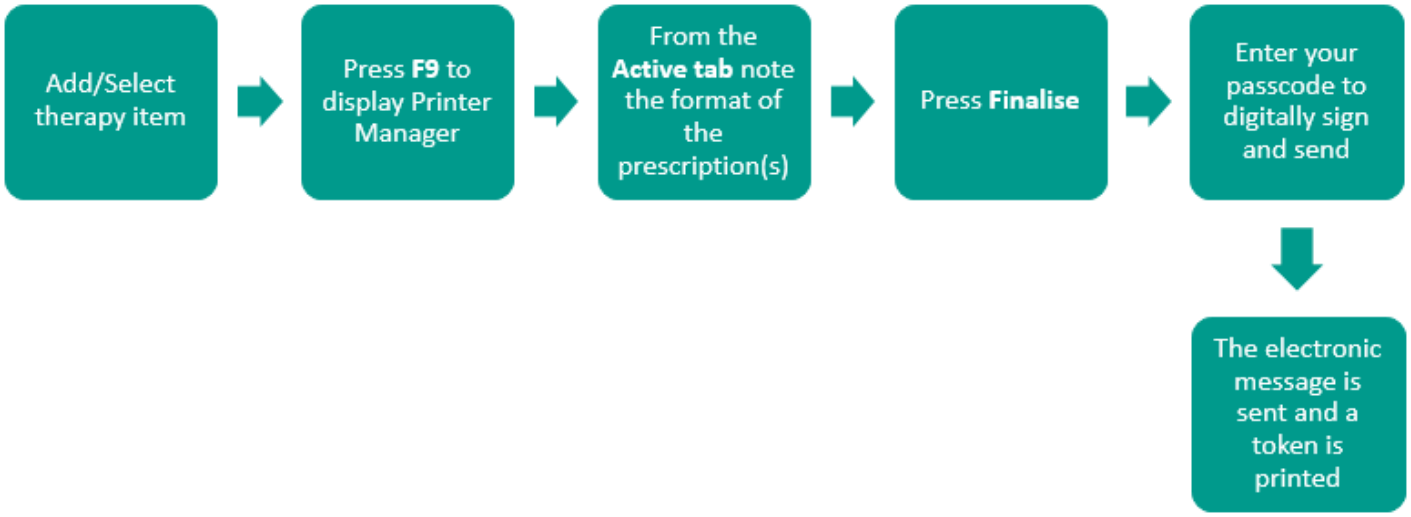


Electronic Repeat Dispensing

Repeat dispensing allows you to authorise several issues of a prescription at once. This means that the patient does not have to return to your practice each time to collect another prescription issue and instead goes direct to the pharmacy.

In the initial stages of EPS R2, electronic Repeat Dispensing is only available to patients who decide to use a nominated dispensing contractor. Batch issues from the Repeat Dispensed items are not printed; however a token is always printed.

If the patient changes their nomination part way through a repeat dispensing cycle, all outstanding prescription issues are transferred to the new nominated dispensing contractor automatically.

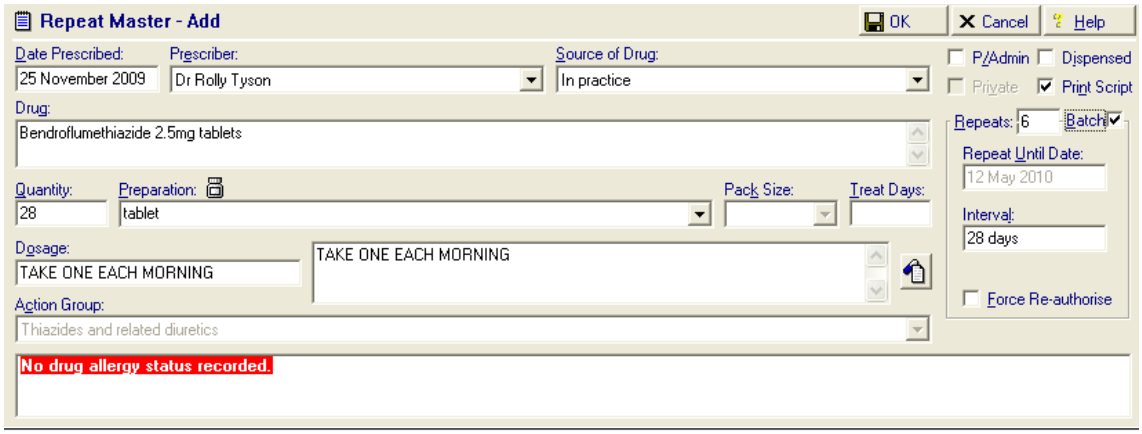


Note – For electronic Repeat Dispensing items, the electronic message is the legal entity, not the paper token.

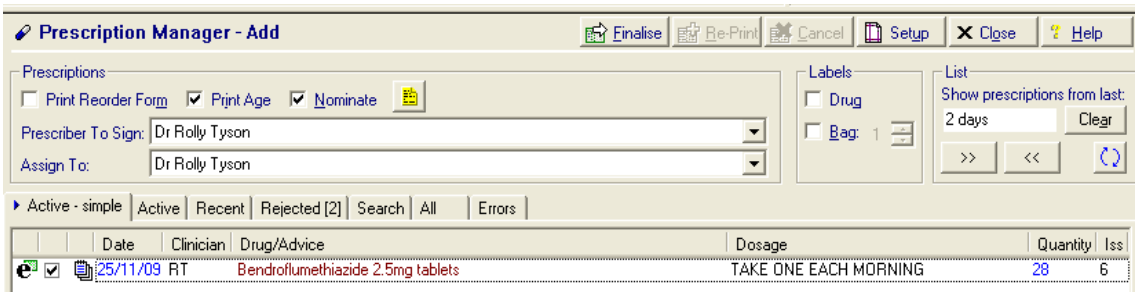
Prescribing Electronic Repeat Dispensing

The instructions to follow give an overview of how electronic Repeat Dispensing works in Vision. Please see Consultation Manager on-screen help for details of how to enable and manage general Repeat Dispensing.

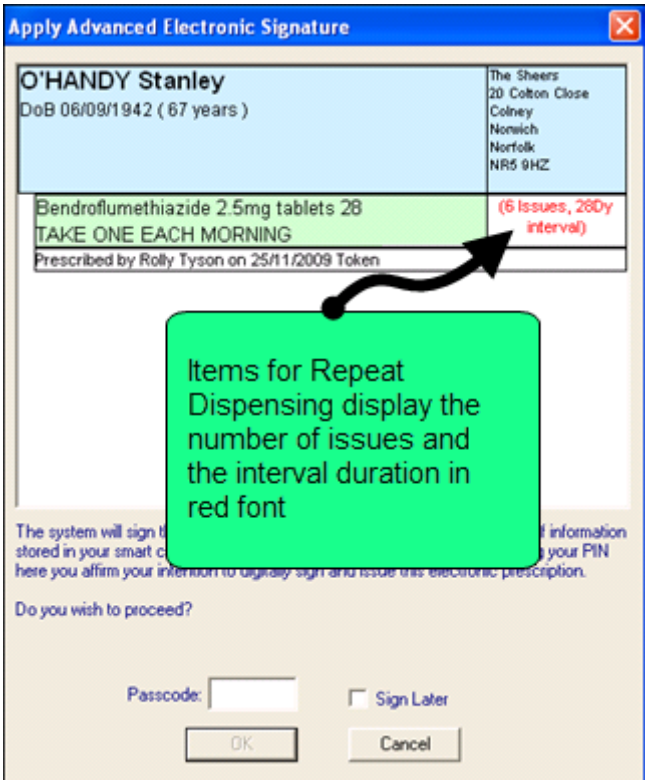
1. From **Consultation Manager**, select the patient.
2. Select **Therapy** tab, add the repeat details as usual, or highlight an existing repeat and re-authorise.
3. To turn the repeat master into an electronic Repeat Dispensing item, tick **Batch**. You then need to add the number of repeats required. The repeat until date and interval are updated automatically, although you are able to adjust this if required.



4. Select **OK** to save.
5. Press **F9** to display **Printer Manager**. Check the details in this screen. You can see that items for Electronic Repeat Dispensing are produced as **Electronic +Token** prescriptions. Remember the message is the legal entity.



6. Select **Finalise**.
7. The **Apply Advanced Electronic Signature** window is displayed. Review the patient and drug details, then enter your Smartcard passcode to sign the prescription now or tick **Sign Later**.



8. Once the message has been digitally signed, a single Repeatable Prescription Authorising Token is printed on FP10 paper (batch issues are not printed). You should give this to the patient to take to the nominated pharmacy.

9. You should instruct the patient that each subsequent repeat item should be collected from their nominated pharmacy without the need to contact your surgery.

Note – Electronic Repeat Dispensed items can be cancelled at anytime up until they are downloaded by the dispensing contractor.

See also Turn Repeat Item(s) into Repeat Dispensing Items.

Electronic Cancellation

Prescribers (or other authorised staff working in the GP practice where the prescription was generated) can cancel electronic prescriptions at any point up until they are downloaded by the dispensing contractor.

You can cancel therapy items in one of the following ways:

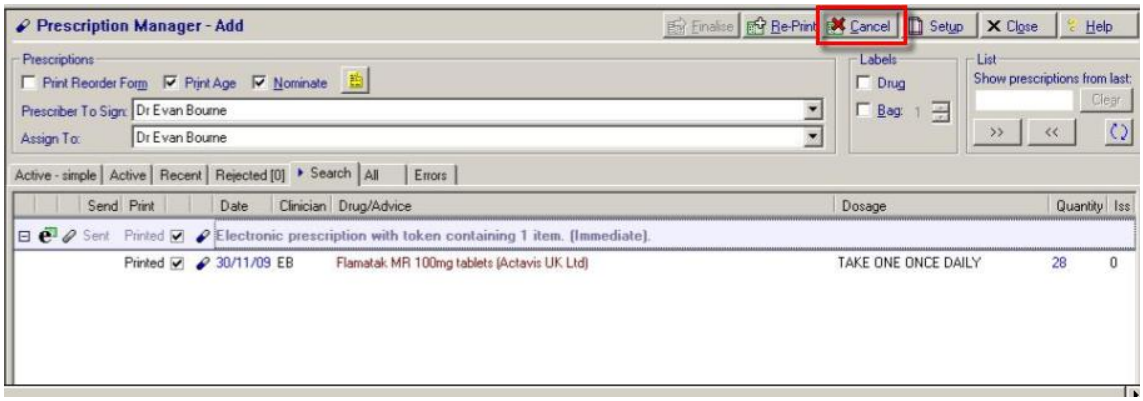
- Remove the therapy from the **Prescription Manager** view, (this allows you to cancel entire prescriptions rather than individual items). To do this press **F9**, to display the Prescription Manager screen. Highlight the item(s) and select **Cancel**.
- Delete the item from the **Therapy – Scripts** screen. To do this right click on the item and choose **Delete.** You are prompted to confirm that you wish to cancel the therapy. See *Cancellation Confirmation - Therapy* (page 43).
- **Inactivate** or **Reauthorise** a repeat with outstanding issues. Highlight the repeat item and choose the option to either Inactivate or Reauthorise. You are prompted to confirm that you wish to cancel the therapy. See *Cancellation Confirmation – Inactivated/Reauthorised Repeat* (page 43).

When an electronic prescription is cancelled, a reason for the cancellation must be given. A message is then transmitted to the Electronic Prescription Service and you must await a response. **Transmitted therapy is not deleted until a successful cancellation acknowledgement has been received**.

> **Note** – You must have RBAC rights to delete therapy in order to cancel electronic prescriptions.

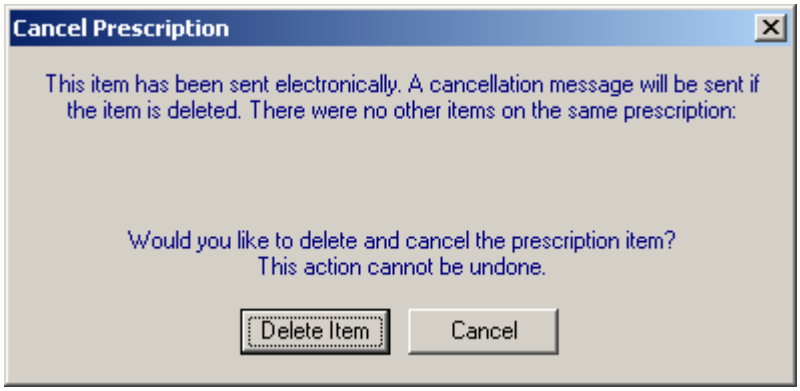
Cancelling Therapy

When the **Prescription Manager** screen is displayed, select **Cancel**. The following message appears: *Would you like to delete the following local item as well? Delete/Leave/Cancel.* Press **Delete**.



Cancellation Confirmation - Therapy

When a therapy item is cancelled that has been sent electronically, the following message appears: *This item has been sent electronically. A cancellation message will be sent if the item is deleted. There were no other items on the same prescription. Would you like to delete and cancel the prescription item? This action cannot be undone.* When there are other items on the same prescription, these items are listed in the window and you can choose to delete the individual item or all the items on the prescription. Note that once a prescription has been cancelled, it cannot be reinstated.



Cancellation Confirmation – Repeat Dispensed Item

When a Repeat Dispensed item is cancelled that has been sent electronically, the following message appears: *Warning. This is a batch issue. All later issues in this batch will also be deleted. Do you wish to send a cancellation message to prevent further issues? This action cannot be undone. Yes/No/Cancel.*

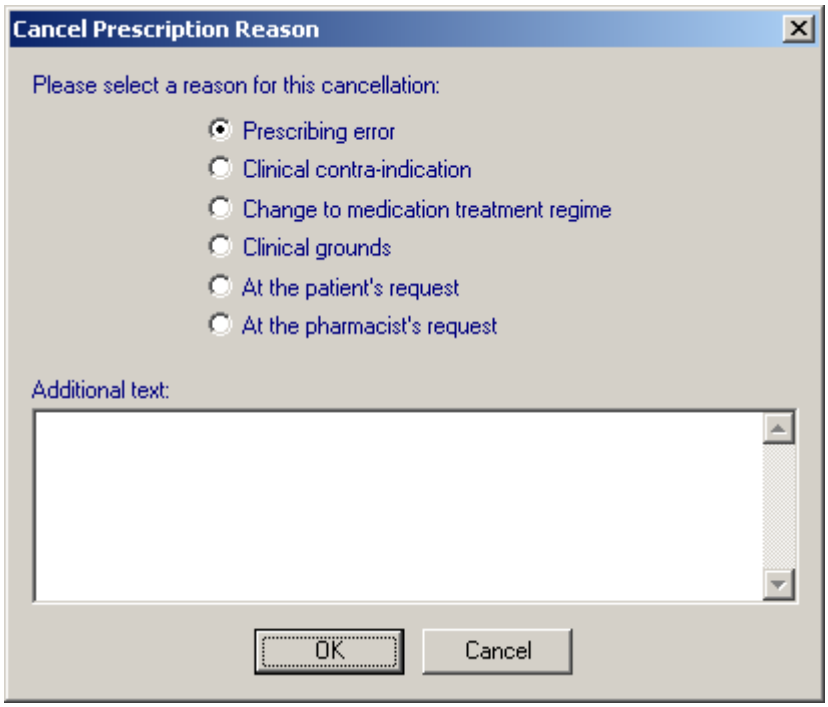
Cancellation Confirmation – Inactivated/Reauthorised Repeat

When a repeat item is inactivated or reauthorised which has not passed its final issue date, the following message is displayed: *This item/some of these items may have outstanding issues at the pharmacy. Do you wish to send a cancellation message to prevent further issues? This action cannot be undone. Yes/No/Cancel.*

Cancellation Reason

After you have confirmed you wish to cancel an item/prescription, you must select a reason for cancellation:

- Prescribing error
- Clinical Contraindication
- Change to medication treatment regime
- Clinical grounds
- At the patient's request
- At the pharmacy request



Additional text is optional. The reason for cancellation is not sent to the pharmacy.

Cancellation Response Message

After you have entered the cancellation reason, a response message is returned. This could be successful (the item is cancelled) or unsuccessful (ie, if the pharmacy have already dispensed item, the item cannot be cancelled).

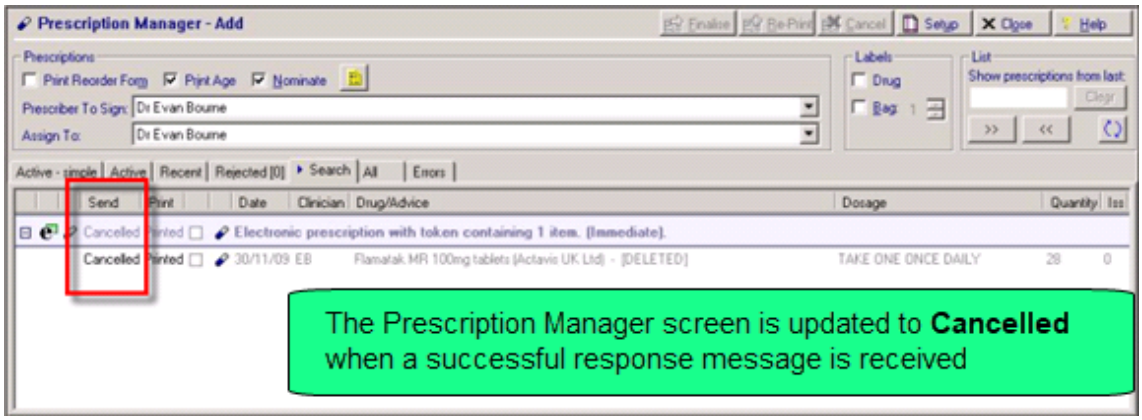
Category	Description	Desired user action
Successful	The cancellation was successful.	None
At pharmacy	The prescription has been downloaded by a dispensing contractor, but has not yet been dispensed.	Contact the pharmacy
Already Dispensed	The prescription has been dispensed to the patient.	Contact the patient
Transmission Issue	The message could not be transmitted due to a messaging issue.	Contact the patient
Prescription not found	This may be because the cancellation message arrived before the electronic prescription. The spine cancels the prescription automatically when it arrives.	None

If you do not receive a cancellation response or you close Consultation Manager before the response it received, the following warning message is displayed: *No cancel verification has been received for the following items for <patient_name><list of items>you should contact the patient or the pharmacy to cancel these items.<pharmacy and patient contact details>OK/Already Cancelled/Continue*

> **Note** – It is your responsibility to make sure that the patient is informed of any drug cancellations generated at your practice.

Successful Cancellation

If a successful cancellation is received, the Prescription Manager screen shows that the prescription has been **Cancelled**.



For more information on Cancellation Messages in Mail Manager. See *Cancellation Request Messages – Phase 3 only* (page 82).

Also see *Cancelling an electronic prescription* (page 86) FAQs.

Repeat Electronic Private Prescribing

Repeat Electronic Private prescribing can be applied to acute, repeat or items for repeat dispensing.

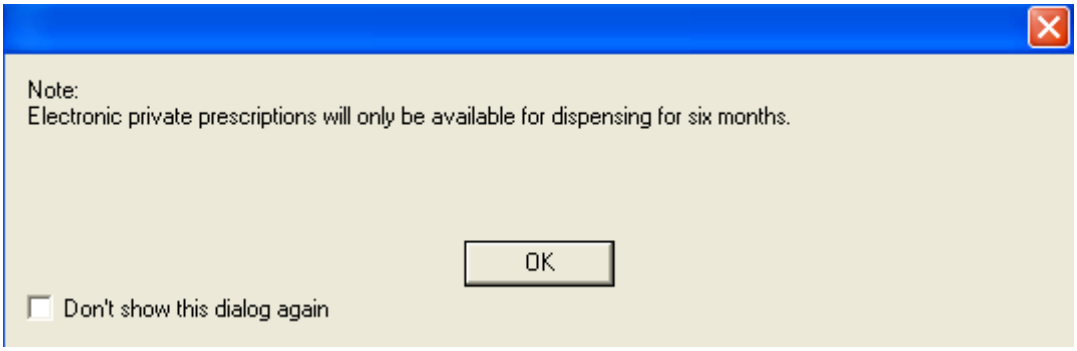
For non-schedule 2 and 3 controlled drugs, the prescription details are printed on the right hand side of the prescription form with a barcode and the message is marked as private.

Unless you have enabled electronic prescribing for drugs within the schedule 2 and 3 arena, the FP10PCD stationery is used and the medication is printed on the left hand side.

Please note the following:

- **It is only possible to send private prescriptions electronically if this has been enabled on the system. This option is currently unavailable until Phase 4 of the Electronic Prescription Service is introduced. See "Activation of EPS (page 11)"**
- You need to make sure that the prescribing clinician has their PCD code entered in Control Panel – File Maintenance.

When adding or re-authorising an EPS R2 eligible repeat that is also private, you are prompted with the following message: *Electronic private prescriptions will only be available for dispensing for six months.* Click OK to continue.

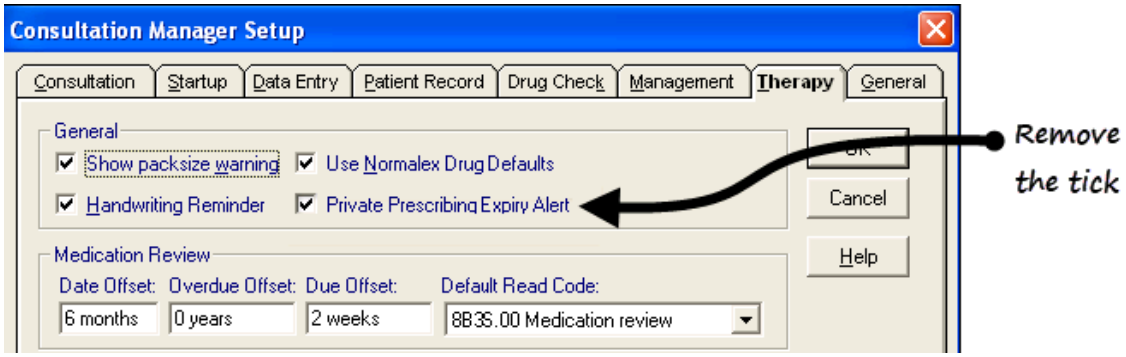


Note – This message is only displayed once per Consultation Manager session.

Private Prescribing Alert Set-up

You can disable the private prescribing alert from Consultation Manager:

1. From **Consultation Manager**, go to **Consultation – Options – Setup – Therapy**.
2. In the General section, remove the tick from **Private Prescribing Expiry Alert**.
3. Select **OK** to save.



Bulk Signing - All Prescriptions View

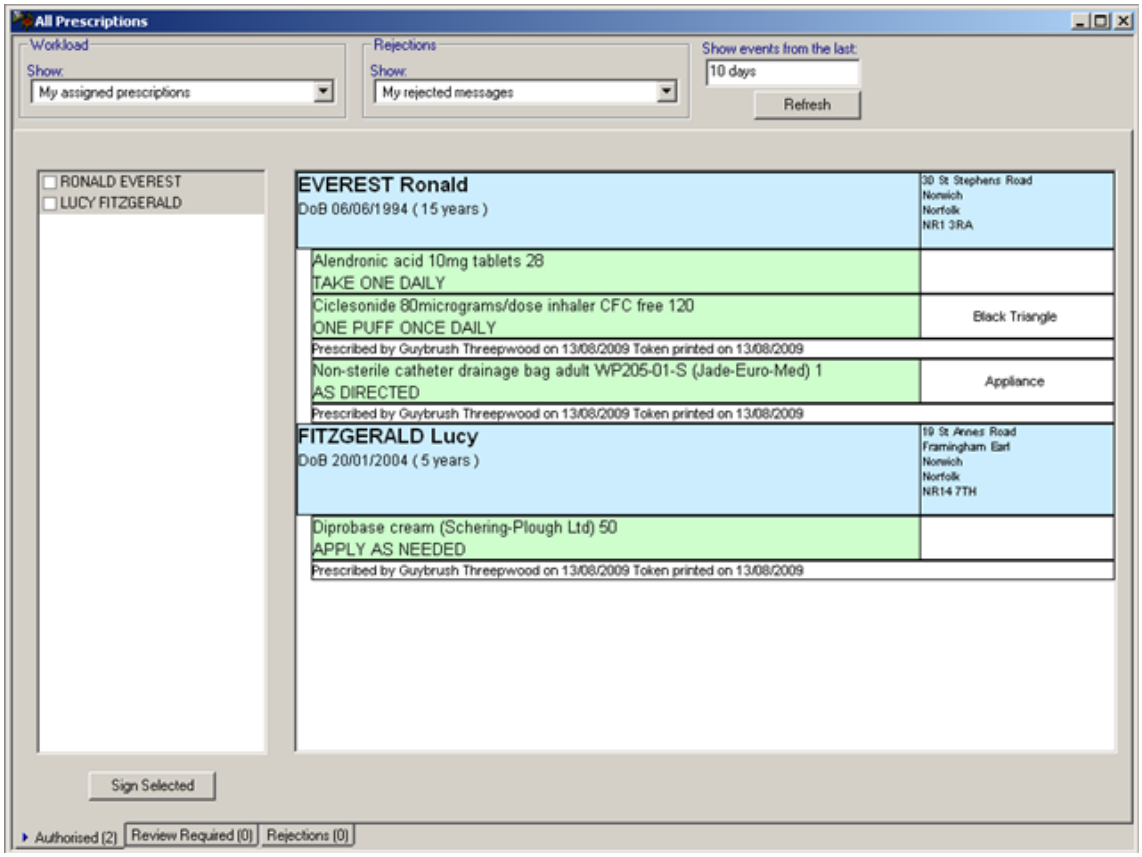
The All Prescriptions view provides a multi-patient view of prescriptions which is accessed via Consultation Manager. This screen has three main purposes:

- To facilitate the bulk signing process after prescriptions have been issued either by admin or clinical staff.
- To process items which need review before signing.
- To facilitate the handling of message rejections.

To access All Prescriptions view:

1. In Consultation Manager either click on the List All Prescriptions icon or go to **Consultation – List All Prescriptions**.
2. The All Prescriptions icon changes appearance depending on the current state of prescriptions in the system. There are the following possibilities:

   - - No prescriptions in workload and no errors
   - - Prescriptions in workload
   - - Rejected items have been detected
3. The All Prescriptions screen is displayed.



All Prescription Filters

From the Workload and Rejections sections, you have the following options to select from:

Workload

Allows you to filter:

- **My Assigned Prescriptions** – any unsent prescriptions where you are the assigned clinician.
- **All My Prescriptions** – any unsent prescriptions where you are the "assigned" or "sign by" clinician.
- **All Prescriptions** – all unsent prescriptions within your practice.
- **Assigned to** – select a name to display unsent prescriptions for specific clinicians.

Rejections

Allows you to filter:

- **My Rejected Messages** – any rejected messages sent by the current user.
- **All Rejected Messages** – any rejected messages sent by any clinician.
- **Assigned to** – select a name to display rejected prescriptions for specific clinicians.

Show Events from the last

- Allows you to enter a date range for the workload and rejected views. The default setting is the last 10 days but you can change this (using w for weeks, m for months and y for years) to anything between the last 5 days and 10 years.

Refresh

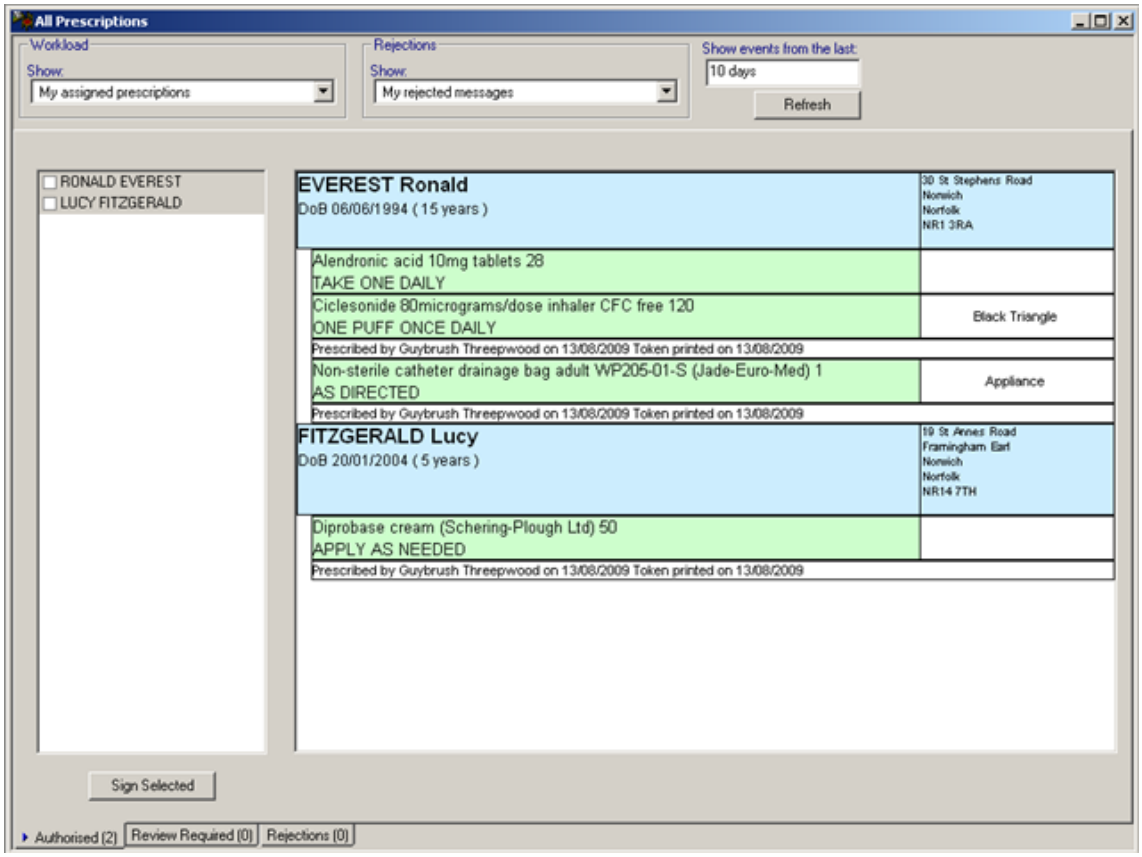
- The refresh button refreshes the views on the current screen.

All Prescriptions Sub-views

There are three tabbed sub-views within the **All Prescriptions** screen. What you see is determined by whether you are a prescriber or non-prescriber:

Authorised Tab - Bulk Signing

The Authorised tab in All Prescriptions view only displays for prescribers. The Authorised tab lists patients and prescriptions which have been marked for signing later, i.e. no action is needed other than a quick confirmation and application of an electronic signature. From here, you can choose to bulk sign all prescriptions in the list:



Urgent Prescriptions

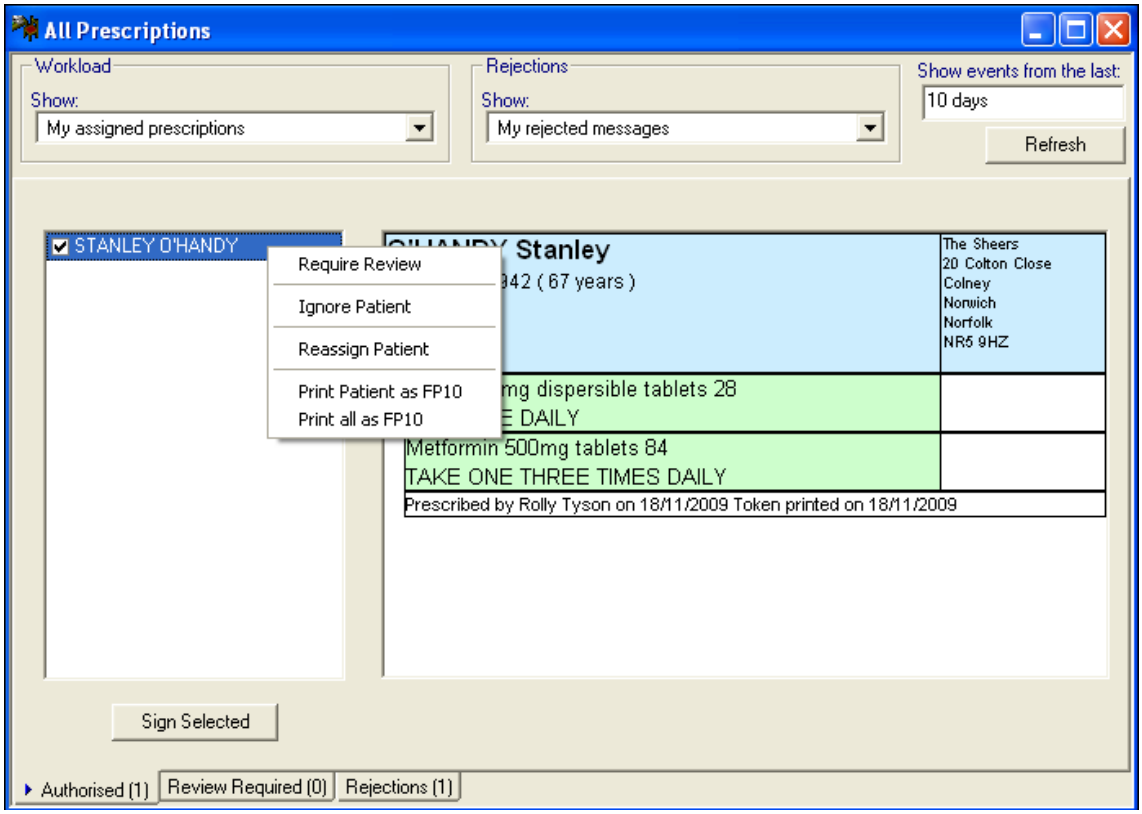
Prescriptions marked as urgent are displayed in the bulk signing screen at the top of the selected patient's prescription items list with the following symbol .

Prescriptions Displayed Oldest First

The order of prescriptions in the patient's prescription items list in the bulk signing screen is ordered oldest prescription first, rather than in alphabetical order. Unless there are urgent prescriptions which are at the top of the list with the following symbol .

Authorised Tab - Right Click Functions

If you right click on a patient name in the Authorised list, you can choose one of the following options:



- **Review Required** – Moves the current patient and all of their prescriptions in the Authorised tab to the Review Required tab.
- **Ignore Patient** – Removes the patient from the list temporarily. The ignored items re-appear once the screen is closed and re-opened.
- **Reassign Patient** – Displays a list of other prescribers in your practice who you can transfer the prescription to. This removes the current prescription from your "My Assigned Prescriptions" section.
- In the event that Spine services are not available, you have the option to either:
- **Print Patient As FP10** - Converts the prescriptions for the currently selected patient to FP10 and prints them.
- **Print All As FP10** – Converts the prescriptions for all selected patients to FP10 and prints them.

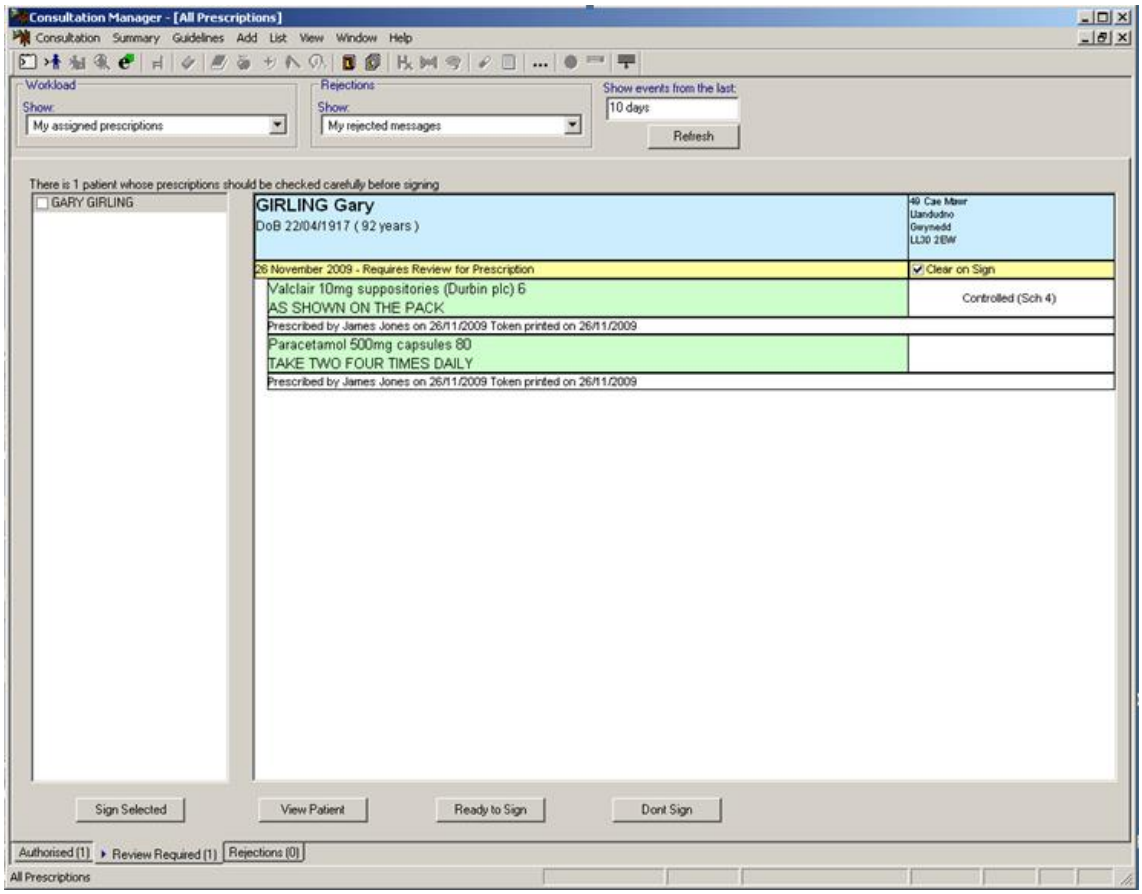
Note – For hosted practices, it is advised that you do not bulk sign an excessive amount of prescriptions at one time.

Review Required Tab

The **Review Required** tab in All Prescriptions View is for prescribers and lists patients and prescriptions where a more detailed review is required. For example, repeats that need re-authorising or items with a requested change following a prescription note from issuer are displayed here. You can also access the patient record in Consultation Manager.

Prescriptions display as Review Required when:

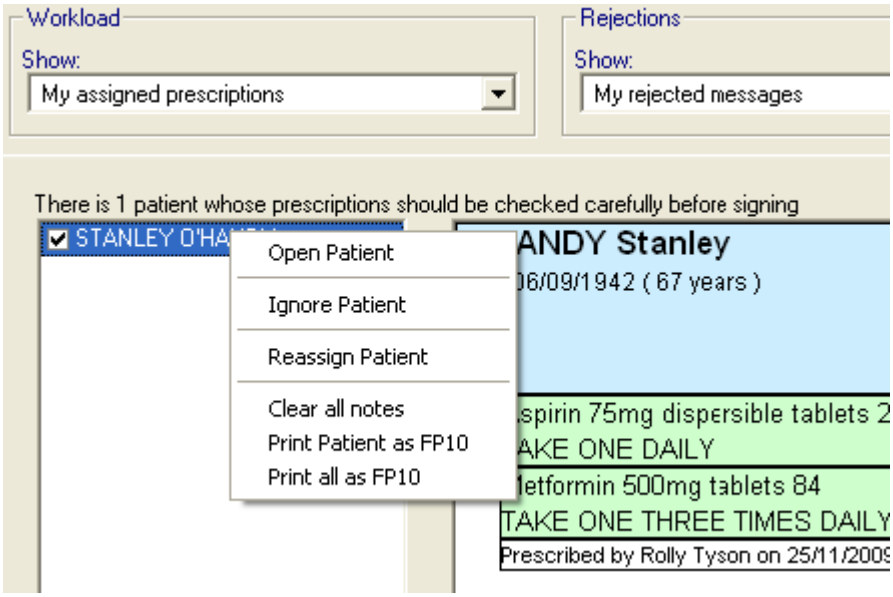
- A prescription has a prescription note.
- Any item in the prescription is the final issue of a repeat master.



- **Sign Selected** – Allows you to sign all the prescriptions for the selected patients in the list. Once you have done this the patient names are removed from the review required list.
- **View Patient (Ctrl O)** – Opens the patient record in Consultation Manager. A consultation is not started regardless of your Consultation Manager settings.
- **Ready to Sign (Ctrl S)** – Selects/ticks the highlighted patient name. This is not enabled unless you have scrolled to the bottom of the prescription list for the patient where relevant.
- **Don't Sign (Delete)** – Deselects/unticks the highlighted patient name and moves to the next patient.

Review Required – Right Click Functions

If you right click on a patient name in the Review Required list, you can choose one of the following options:



- **Open Patient** - Opens the patient record in Consultation Manager. A consultation is not started regardless of your Consultation Manager settings.
- **Ignore Patient** – Removes the patient from the list temporarily. The ignored items re-appear once the screen is closed and re-opened.
- **Reassign Patient** – Displays a list of other prescribers in your practice who you can transfer the prescription to. This removes the current prescription from your "My Assigned Prescriptions" section.
- **Clear All Notes** – removes the prescription note and cancels the corresponding reminder. This is done automatically once the prescription is signed anyway.

- In the event that Spine services are not available, you have the option to either:
  - **Print Patient As FP10** - Converts the prescriptions for the currently selected patient to FP10 and prints them.
  - **Print All As FP10** – Converts the prescriptions for all selected patients to FP10 and prints them.

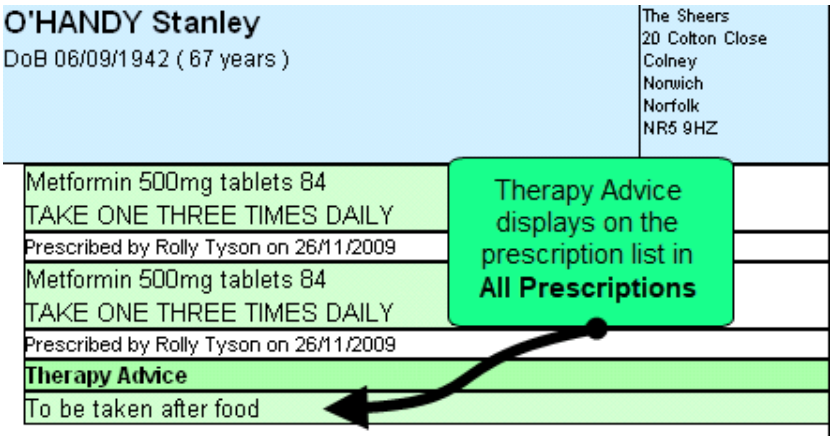
Paper Prescriptions

For the Authorised and Review Required tabs, any paper or dual prescriptions that were printed in the last two days are listed in the prescription window by default. This is to alert you that you may have outstanding prescriptions to sign in ink that the patient needs to collect.

Therapy Advice

You can select Advice from the toolbar to add Therapy Advice.

For the Authorised and Review Required tabs, any therapy advice added to the prescription displays in the prescription window. This prints on FP10 paper for the patient and is included in the electronic message.



Rejections Tab (prescribers and non-prescribers)

The Rejections tab in Consultation Manager – All Prescriptions provides a list of all prescriptions or prescription cancellations that have been rejected. The All Prescriptions icon also changes to indicate that rejected items have been detected .

> **Note -** A patient does not need to be selected when the rejection is received in order for their name to be added to the Rejection list.

From here you can open the patient and do one of the following options:

- Review the rejection and finalise the item(s) again.
- Change the prescription to paper only.

Review the rejection and finalise the item(s) again

1. Highlight the patient and select **Open Patient.**
2. Press **F9** to display the Prescription Manager screen.
3. The **Finalise** button is inactive until the prescription is selected.
4. Tick the prescription and select **Finalise.**

Change the Prescription to paper only

1. Highlight the patient and select **Open Patient.**
2. Press **F9** to display the Prescription Manager screen.
3. Select the prescription, right click and select **Paper.**

Post Dating Prescriptions

Please be aware that as with paper prescriptions, once an electronic repeat prescription has been issued, you cannot issue another prescription from the master until the date of the last issued prescription has been reached.

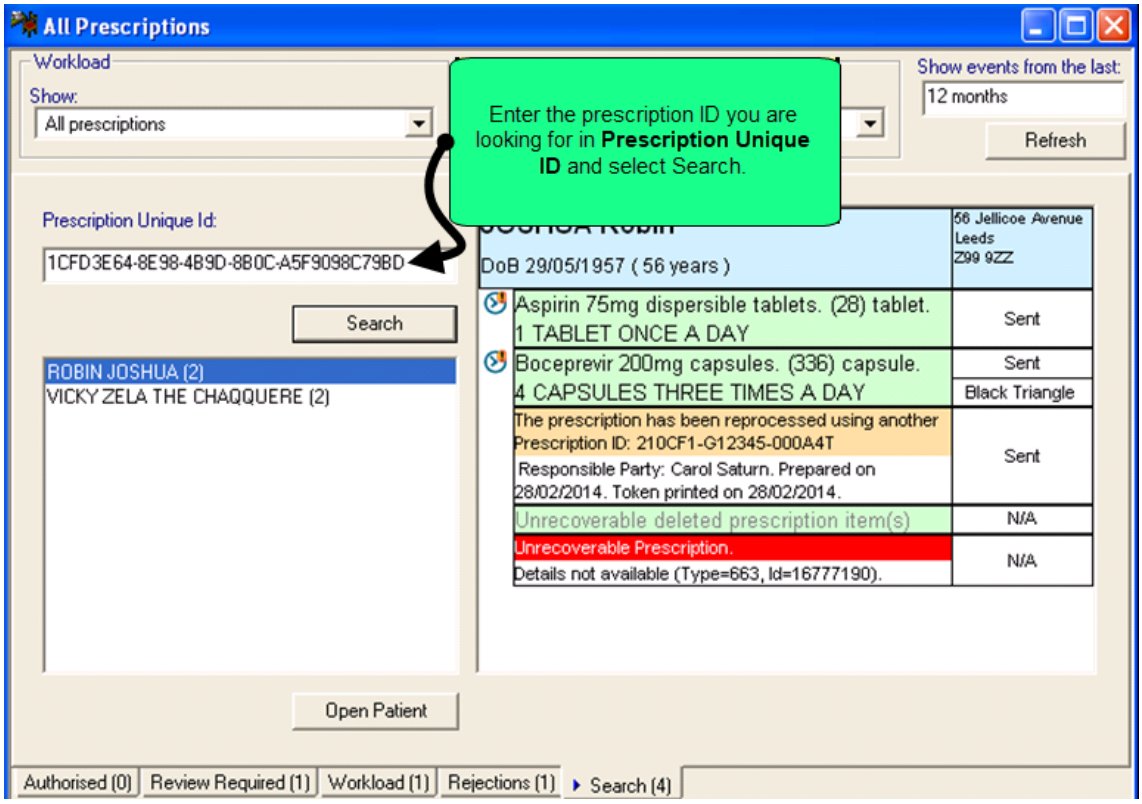
> **Note** - Previously, if you wanted to cancel one item from a post dated EPS prescription that contained other items, Prescription Manager displayed the individual item as being cancelled with the other items still valid when in fact the entire prescription message was cancelled on the Spine. From DLM 460, as a temporary fix, it is no longer possible to cancel individual items for post dated EPS prescriptions. We will be fixing this in a later release in line with Spine Version 2.

Lost Prescriptions

If electronic prescriptions are "lost" it is advised that you check your **All Prescriptions** view in **Consultation Manager** (prescriptions may not have been signed, thus not sent) and also the prescription status in **Prescription Manager** and **Mail Manager** to make sure there are no errors.

Search for Prescription by Unique Identifier

You can search for the Prescription ID on the **Bulk Signing - All Prescriptions** view. The search is performed on all EPS messages including sent, deleted, cancelled and rejected messages.



If the unique Id is found the All Prescription screens displays:

- The patient highlighted with their prescription details
- The Search tab displays the total number of prescriptions found

Note - If the prescription has been deleted, the message **Deleted** precedes the medication item.

If the unique Id is not found you see the message, "*No results found*"".

Nomination

What is Nomination?

Nomination gives patients the option to choose, or nominate, a dispensing contractor, (for example, a pharmacist), to which their acute, repeat and repeat dispensing prescriptions can be sent automatically via the Electronic Prescription Service. This removes the need for most patients to call at their GP practice to collect a paper prescription form.

> **Note** – Patients are not obliged to nominate a dispensing contractor. However, if the patient does not nominate, prescriptions cannot be digitally signed and Vision reverts to using barcoded prescriptions which must be manually signed (as per EPS 1).

Patients can choose to nominate up to three dispensing contractors at any one time, including:

- One community pharmacy;
- One dispensing appliance contractor; and,
- One dispensing GP practice (if eligible). You cannot record the nomination of a dispensing GP in Vision unless you are the dispensing GP practice.

Patients can only nominate a place to receive their electronic prescriptions that is using release two of the Electronic Prescription Service. Within Vision, you can assist the patient by searching for such contractors.

Please note the following:

- If a patient has a Nominated Pharmacy set up, when EPS2 is enabled the Preferred Pharmacy details are no longer used. The Nominated Pharmacy is used by default for all prescriptions issued to the patient.
- If the patient does not have a Nominated Pharmacy the Preferred Pharmacy details are used by default for all prescriptions issued to this patient.
- If the Preferred Pharmacy differs from the Nominated Pharmacy an alert is displayed to enable you to notify the patient of the change to their dispensing pharmacy. Once informed the alert can be removed and the Preferred Pharmacy is subsequently changed to the same details as the Nominated Pharmacy to reflect this.

  For example, a patient has their Preferred Pharmacy set to Boots and their Nominated Pharmacy set to Lloyds: If the practice is not EPS2 enabled the prescriptions for the patient are, by default, be sent to Boots. If the practice becomes EPS2 enabled, the prescriptions for the patient are automatically sent to Lloyds by default instead. An alert is displayed in Consultation Manager to enable you to notify the patient of the change.

  Reminder:

  - **Preferred Pharmacy** is used to record the patients' preference for their paper (FP10) prescriptions; this is added by the practice.
  - **EPS Nominated Dispensers** is used to record the patients' preference for their Electronic prescriptions; this is added by the practice or pharmacy and is transmitted via PDS.

The patients pharmacy preferences can be viewed in Consultation Manager select the Patient Details tab, then select Preferences tab.

If an EPS nomination is received that differs from the Preferred Pharmacy an EPS Nomination Mismatch message is shown in the Alerts pane.

Where Can Patients Nominate?

Patients can nominate a dispensing contractor to receive their electronic prescriptions at any of the following places:

- GP practice.
- At any dispensing contractor that offers the EPS R2 service.

Once patient nomination has been recorded, all future prescriptions can be electronically sent to the place the patient has nominated.

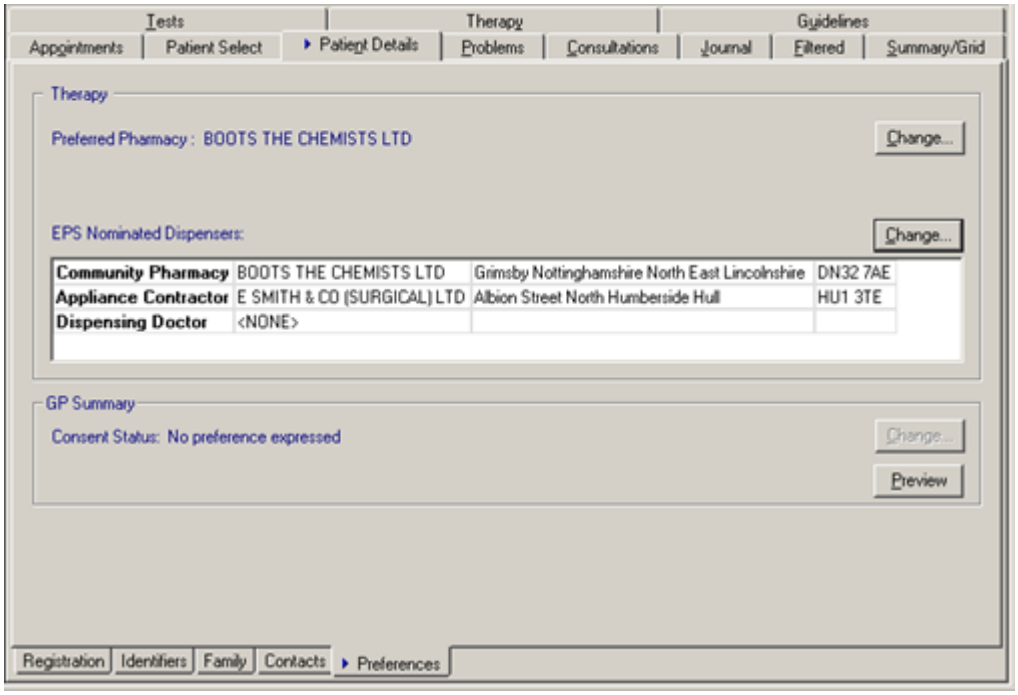
The patient should be encouraged to go to the nominated place to collect their medication or appliance – unless they have made alternative arrangements.

Recording Contractor Nomination

You can search for dispensing contractors via the Nomination Management window in Consultation Manager. Pharmacy details are maintained via the patient choices database on the PDS system:

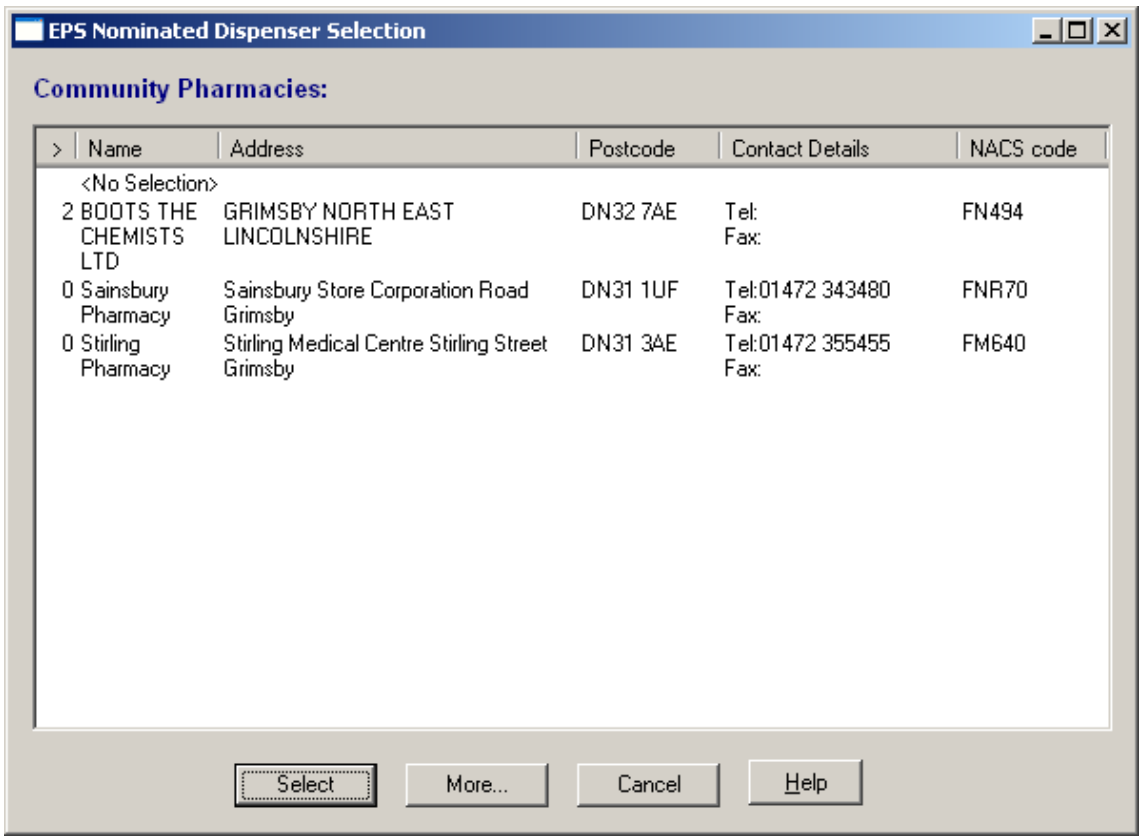
> **Note** – All instructions assume that you are logged into Vision with your Smartcard and that you have the appropriate role/functions to access EPS R2 functionality.

1. In Consultation Manager, select the patient and open a consultation.
2. Select **Patient Details** or tab.
3. From the bottom row of tabs, select **Preferences**. Under the EPS Nominated Dispensers section, any dispensers previously nominated by the patient are listed (the type of contractor, name and address are displayed).
4. To change or select a new dispensing contractor, click on either Community Pharmacy, Appliance Contractor or Dispensing Doctor, then click on the **Change** icon.



Note – To nominate a pharmacy chain, i.e. Boots, you must select a specific pharmacy location/address. It is not possible to select just a generic pharmacy name.

5. The **EPS Nominated Dispenser Selection** window is displayed. You are initially presented with a list of all the dispensers previously selected by patients at your practice by order of frequency.

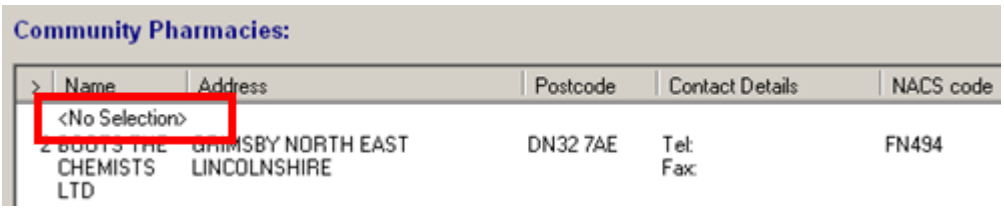


Select Pharmacy from the Practice Preferred List

Choose a pharmacy from the preferred list (generated by the most used at your practice) and click the **Select** button. Vision checks with PDS whether the pharmacy is still participating in EPS R2. If the pharmacy is not participating, the following message is displayed "*This site is no longer available to use this service*" and it is removed from the preferred list. If the pharmacy is participating, the window closes and the pharmacy is recorded as a nominated pharmacy for the selected patient.

Remove Selected Pharmacy

Choose **No Selection – Select** to remove the patient's currently nominated pharmacy.



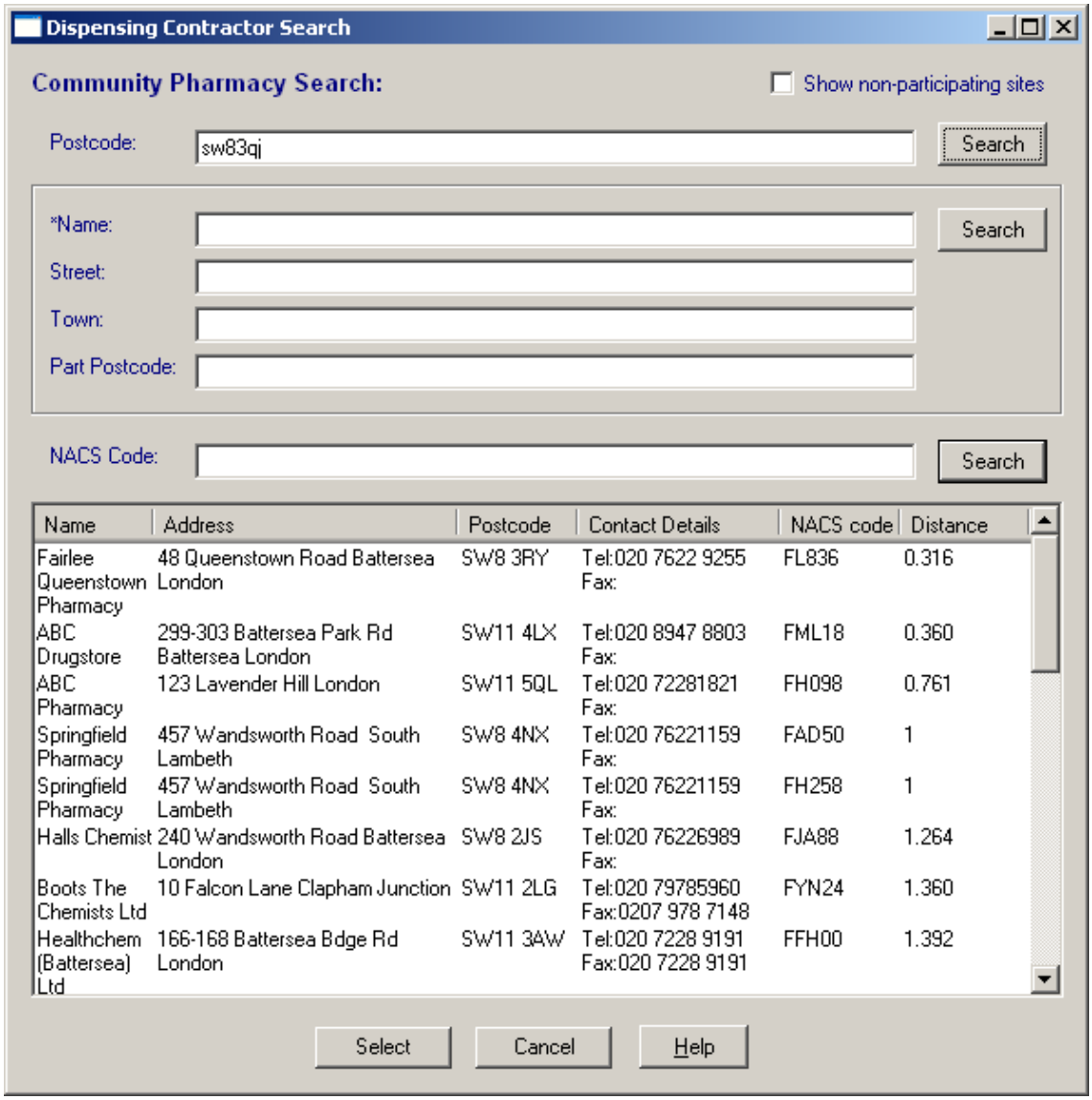
<No Selection> is now displayed in the Community Pharmacy field of the EPS Nominated Dispensers section to depict that the patient has no nominated pharmacies recorded.

Detailed Pharmacy Search

Click on **More...**

within the EPS Nominated Dispenser Selection window to run a detailed pharmacy search. The Pharmacy Search window is displayed. From here, you can use one or more of the following options to search for a Community Pharmacy:

- **Show non-participating sites** – includes dispensing contractors in the search who are not compliant with EPS R2. Any matching non-compliant pharmacies display in greyed out text and cannot be selected. This selection is unchecked by default.
- **Postcode** – enter the full postcode to find a matching pharmacy.
- **Part Postcode** – enter up to 4 characters of a postcode.
- **Name, Street, Town** – enter the name or location of the pharmacy.
- **NACS Code** – Search by NACS code (National Administrative Codes Service).



Once you have found the required pharmacy, click on **Select** to save. Nominations are not stored in Vision. When a pharmacy is nominated, a PDS update is generated and a message is sent to the Spine.

Re-ordering Repeat Prescriptions

Once nomination has been recorded, patients should continue to re-order their repeat prescriptions from your surgery in the same way as normal. However, instead of having to make arrangements to collect the prescription from you, the prescription is sent electronically to the contractor they have nominated.

Acute Prescriptions and Nomination

Nomination can be used for acute prescriptions that only need to be collected once, but as most are issued following a face-to-face consultation, it probably does not save the patient a trip to the GP practice.

Recording EPS Exceptions

You can exclude the following patients from using the EPS service by recording the following corresponding Read code on their record:

- Patients who live on the border of England and collect their items from Scotland or Wales:
  - **9Re..** Electronic Prescription Service exception - cross-border patient,
- If your practice or the practice that patients collect their prescriptions from is a dispensing practice who is not EPS enabled:
  - **9Rf..** Electronic Prescription Service exception - dispensing general practice not yet Electronic Prescription Service compliant

Note - The Spine Demographics consent flag does not apply to EPS and can therefore be ignored for EPS processes.

Changing Nomination

Nomination is very flexible and can be changed or cancelled at any time. Patients can change nomination at:

- Their GP practice.
- Any pharmacy or dispensing appliance contractor that offers the EPS R2 service.
- In the future, by logging into *HealthSpace.* (*http://www.healthspace.nhs.uk*)

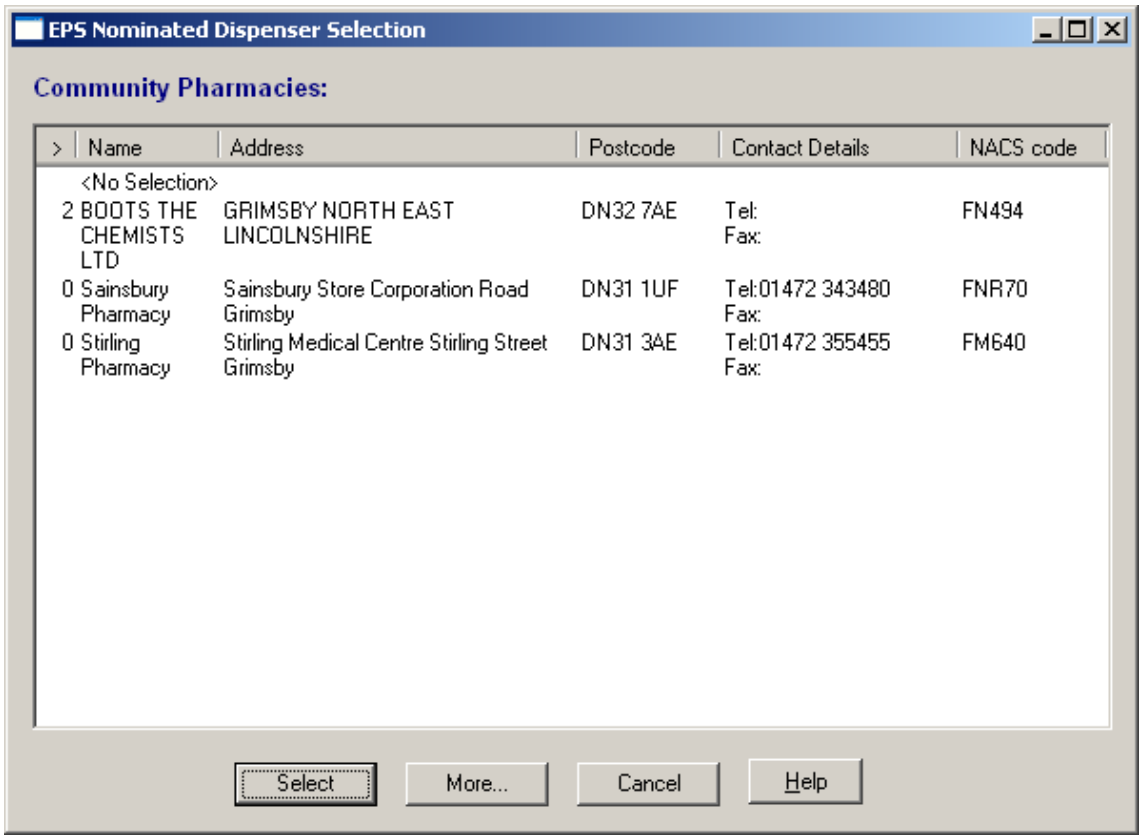
Patients do not have to use their nominated dispensing contractor on every occasion but need to let you know before the prescription is generated.

> **Note** – If you change nomination for a patient who has Electronic Repeat Dispensing items, the outstanding items are automatically transferred to the new nominated pharmacy.

Removing the Currently Nominated Pharmacy

To remove a nominated pharmacy in Vision:

1. Go to **Consultation Manger – Patient Details – Preferences**.
2. From the EPS Nominated Dispensers section, select the required contractor and click the **Change** button.
3. To remove the currently nominated pharmacy without selecting a replacement, click on <**No Selection> - Select**.



4. The EPS Nominated Dispensers section in Patient Details – Preferences now displays <no selection> for community pharmacy nomination.

Unlinked Patients

If the patient is unlinked with the PDS system, for example, you have not logged in with your Smartcard, the pharmacy names are replaced with the text "<data not available>" and all EPS functionality is disabled.

Choosing Not to Nominate

If a patient chooses not to nominate, barcoded paper prescriptions print as they do with EPS Release 1.

> **Note** - In **Phase 4**, where the prescription is electronic only. Your prescription can be sent electronically even if the patient decides not to nominate. However, the paper copy/token of your electronic prescription is still needed to collect the prescription.

Preferred Pharmacy

The preferred pharmacy section in Consultation Manager – Patient Details - Patient Preferences has previously allowed you to record the patients preferred pharmacy obtained from a list you have set up in Control Panel – File Maintenance. For **paper prescriptions**, this list remains fully functional, as it is possible that the patient's preferred pharmacy is not enabled for EPS R2 functionality. However, when choosing a nominated dispenser, if electing a different pharmacy to the Preferred Pharmacy selection, the Preferred Pharmacy is changed to match the elected EPS Nominated Dispenser.

It is recommended that you add the pharmacy NACS code in Control Panel to existing and new preferred pharmacy entries. You can obtain this from the Nominated Dispensers search list in Patient Details. Adding the NACS code means that Vision can accurately match or mismatch the nominated and preferred pharmacy on the patient record.

Please note the following:

- If a patient has a Nominated Pharmacy set up, when EPS2 is enabled the Preferred Pharmacy details are no longer used. The Nominated Pharmacy is used by default for all prescriptions issued to the patient.
- If the patient does not have a Nominated Pharmacy the Preferred Pharmacy details are used by default for all prescriptions issued to this patient. (EPS2 eligibility still applies, in that a patient is not eligible for EPS2 prescriptions without a nomination prior to EPS2 phase 4.)
- If the Preferred Pharmacy differs from the Nominated Pharmacy an alert is displayed to enable you to notify the patient of the change to their dispensing pharmacy. Once informed the alert can be removed and the Preferred Pharmacy is subsequently changed to the same details as the Nominated Pharmacy to reflect this.

For example, a patient has their Preferred Pharmacy set to Boots and their Nominated Pharmacy set to Lloyds: If the practice is not EPS2 enabled the prescriptions for the patient are, by default, sent to Boots. If the practice becomes EPS2 enabled, the prescriptions for the patient is automatically sent to Lloyds by default instead. An alert is displayed in Consultation Manager to enable you to notify the patient of the change.

Reminder:

- **Preferred Pharmacy** is used to record the patients' preference for their paper (FP10) prescriptions; this is added by the practice.
- **EPS Nominated Dispensers** is used to record the patients' preference for their Electronic prescriptions; this is added by the practice or pharmacy and is transmitted via PDS.

The patients pharmacy preferences can be viewed in Consultation Manager select the Patient Details tab, then select Preferences tab.

If an EPS nomination is received that differs from the Preferred Pharmacy an EPS Nomination Mismatch message is shown in the Alerts pane.

****Important** Preferred Pharmacy - NACS Code**

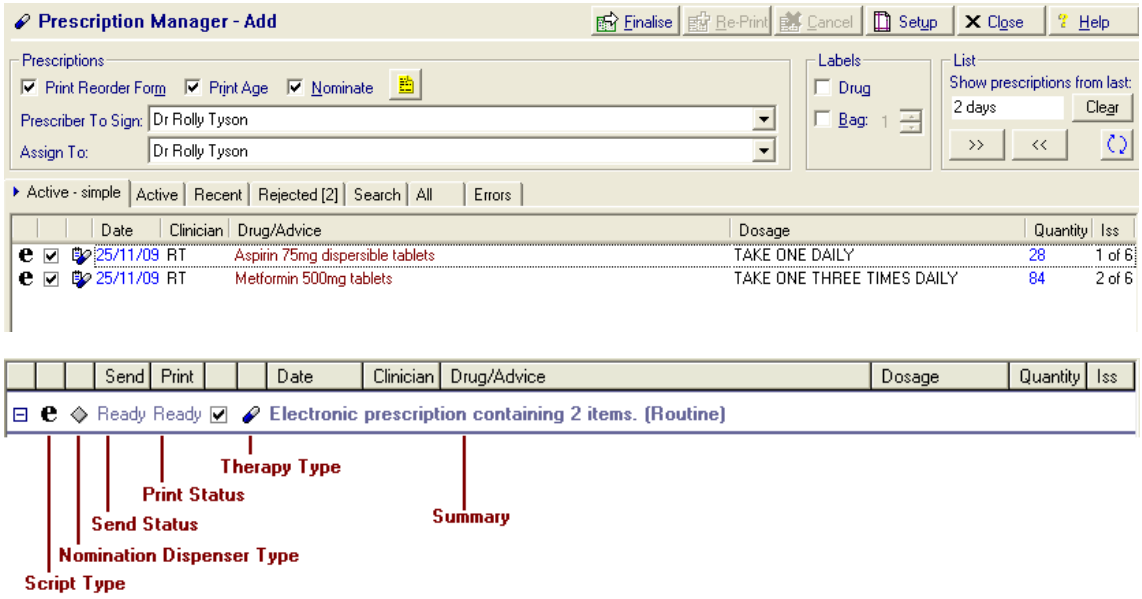
For existing and new preferred pharmacy entries (added in Control Panel – File Maintenance - Organisations which can then be selected in Consultation Manager – Patient Details), it is strongly recommended that you add the preferred pharmacy NACS code in the identifiers tab. If you do not add the NACS code to the preferred pharmacy and the same pharmacy is selected as the patient's nominated dispenser with a different description, the mismatch alert is displayed in Consultation

Manager. You can look up the NACS code in the nominated dispenser list in Consultation Manager – patient details.

Prescription Manager and EPS

The Prescription Manager view in Consultation Manager - Therapy gives access to all prescription-specific functionality and information for the currently selected patient. It is used by both clinicians and non-clinicians alike.

Once medication has been added and issued, all prescriptions for the selected patient are displayed in the Prescription Manager view. You can see that prescriptions are divided by type (ie electronic, electronic + token, RHS items etc), you can drill down to view the details of each item on the prescription.



Prescription Types

There are now four possibilities for prescription production with EPS Release 2:

- - **Electronic** signed electronic message. Message is the legal entity
- - **Electronic +Token** - if the patient requires paper or Repeat Dispensed items. Message is the legal entity.
- - **Dual** - a single ETP message and dual signed script/token. Paper is the legal entity.
- - **Paper** (signed script only, eg FP10) - this is the only icon displayed if ETP is not enabled. Paper is the legal entity

You can change the prescription type by right clicking on the item.

Type of Therapy

The type of therapy prescribed is displayed in Prescription Manager as follows:

- **Acute**.
- **Issue of a repeat**.
- **Batch issue** (issue of a repeatable prescription. Not printed if the master prescription is sent via EPS). Repeat dispensing only.
- **Batch prescription** (i.e., the Repeat Master, with a batch setup is defined by Interval and number of Repeats. Repeat dispensing only).
- **Right-hand side item** - Private prescriptions items, non-FP10 drugs and discontinued drugs; non-drug therapies; handwritten items.
- **Therapy advice** (non-drug therapy) - advice to patient printed on right-hand side.
- PA **Practice administered** (not part of this release).

Prescription Manager Tabs

Prescription Manager has the following tabs:

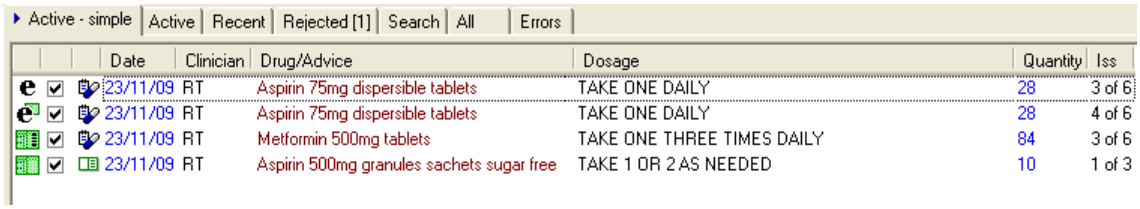
- **Active Simple** - Similar to the old Print Therapy screen listing prescribed items for print. No prescriptions are shown, just the prescription items. See *Active Simple tab* (page 67).
- **Active** - Divides the medication into prescription pages, as per their type. This includes all prescriptions that are ready to print or send, including rejected prescriptions. See *Active Tab* (page 68).
- **Recent** - Lists recently printed medication (but only those printed since Prescription Manager was switched on). Can be used to reprint prescriptions. See *Recent Tab - used for reprinting* (page 70).
- **Rejected** - Shows any rejected messages for EPS. See *Recent Tab - used for reprinting* (page 70).
- **Search** - Displays printed items for reprint but only those printed since Prescription Manager was switched on. See *Search/Show Prescription Tab* (page 71).
- **All** - Lists all prescriptions (but only those printed since Prescription Manager was switched on), and can be used to reprint prescriptions. See *All Tab* (page 72).
- **Error** - Lists any prescriptions that fail to load. See *Errors Tab* (page 72).

The Setup button lets you choose whether to display **Simple Active** or **Active** tab as the initial default.

Active Simple tab

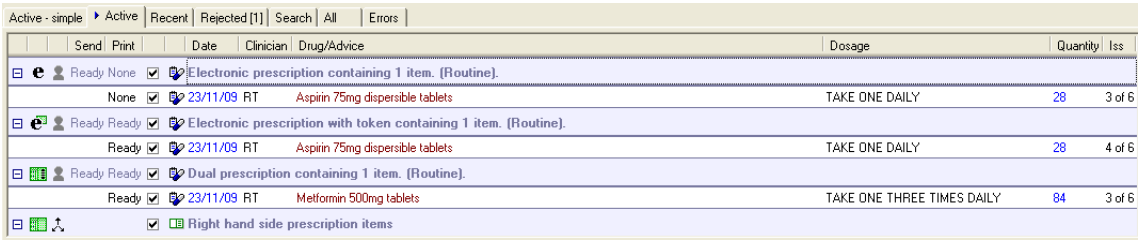
Active - Simple is the tab you can use while ETP-inactive, or if you prefer a screen similar to the old Print Therapy screen. This just lists the prescribed items without dividing them into prescriptions.

The **Active - Simple** tab displays items in the order which they were entered:



Active Tab

The **Active** tab groups the prescription items on **Prescription Manager** into groups according to their prescription type:



- Before printing, the grouped pages are provisional (ie you could decide to change an electronic item to electronic + token by right clicking on the item in Prescription Manager), after printing, the prescription grouping cannot be changed.
- The default script type is the most paperless type available to the item. The order of preference is: **Electronic**, **Electronic + Token**, **Dual**, **Paper**.
- Free of charge contraceptive items print as a separate prescription.

Note - A right mouse Context menu lets you change dual (electronic) prescriptions to paper prescriptions, as well as set the urgency.

The final prescription allocation of items is decided at the time of printing. There is a limit to four items per prescription. More than four items and a new prescription of the same type is made.

The prescriptions are separated by a blue header line, (eg *Paper Prescription group containing 3 items*), followed by the items under that prescription.

Allocation on to the pages depends on several factors, the prescription type, the drug type and other factors such as right-hand side only, controlled drugs etc:

- **Drug type**, which can be seen third column from left after the prescription type on the blue header line to the right of the expand/collapse icon on Active Full:
  - any drug that is not an appliance or oxygen product
  - Devices, bandages etc, defined as appliance in the drug dictionary.

– oxygen products, defined within the drug tariff

And **separate groups** for:

– **Right-hand side items** such as private scripts, non-FP10 drugs, discontinued drugs; non-drug therapies ie therapy advice. Also printed on the right-hand side is a repeat reorder form, and handwritten items.

– **Controlled drugs (Schedule 2 and 3)**

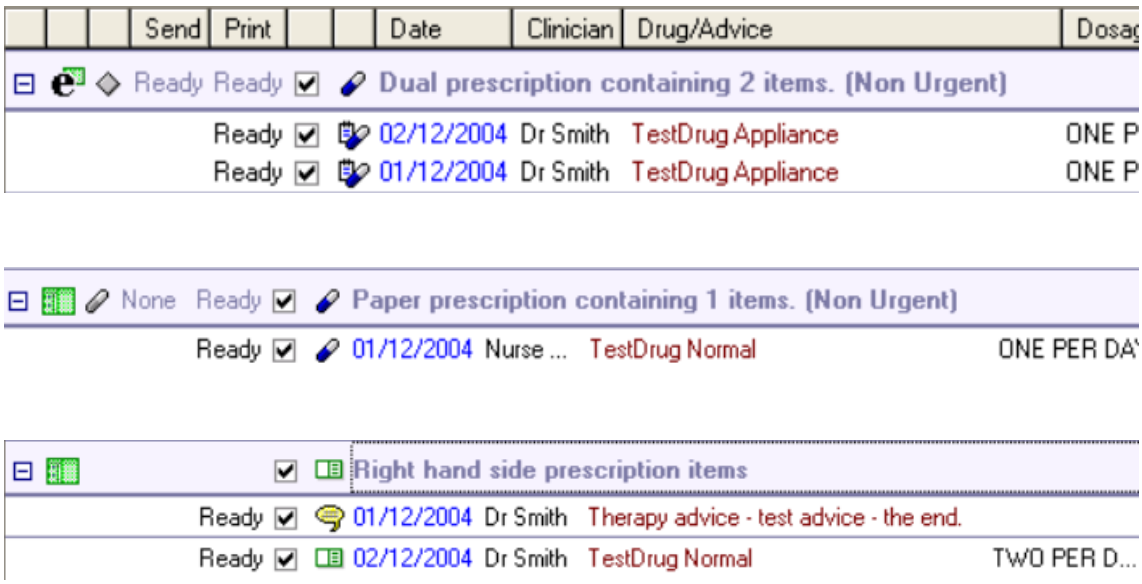
– PA **Practice administered** (Note - not part of this release , therefore at present, paper prescriptions only)

– **Contraceptive items**

– **Batch prescriptions**

Each prescription page header has an expand icon on the extreme left which you can use to collapse or expand the list of prescription items underneath. The columns, from the left are:

- The prescription type (dual or paper),
- The drug type (drug, appliance, oxygen),
- Send and Print status if EPS (usually Ready, though paper prescriptions show None under Send),
- whether selected (ticked or unticked),
- the number of items per page,
- the urgent/non-urgent status,
- and the items listed underneath, for example:



Therapy type:

- **Acute**.
- **Issue of a repeat**.
- **Batch issue** (issue of a repeatable prescription. Not printed if the master prescription is sent via EPS). Repeat dispensing only.

- **Batch prescription** (ie, the Repeat Master, with a batch setup is defined by Interval and number of Repeats. Repeat dispensing only).
- **Right-hand side item** - Private prescriptions items, non-FP10 drugs and discontinued drugs; non-drug therapies; handwritten items (controlled drugs).
- **Therapy advice** (non-drug therapy) - advice to patient printed on right-hand side.
- PA **Practice administered** (not part of this release).

Date, Clinician, Drug name or Advice text, Dosage, Quantity and Issues - The remaining columns are as before.

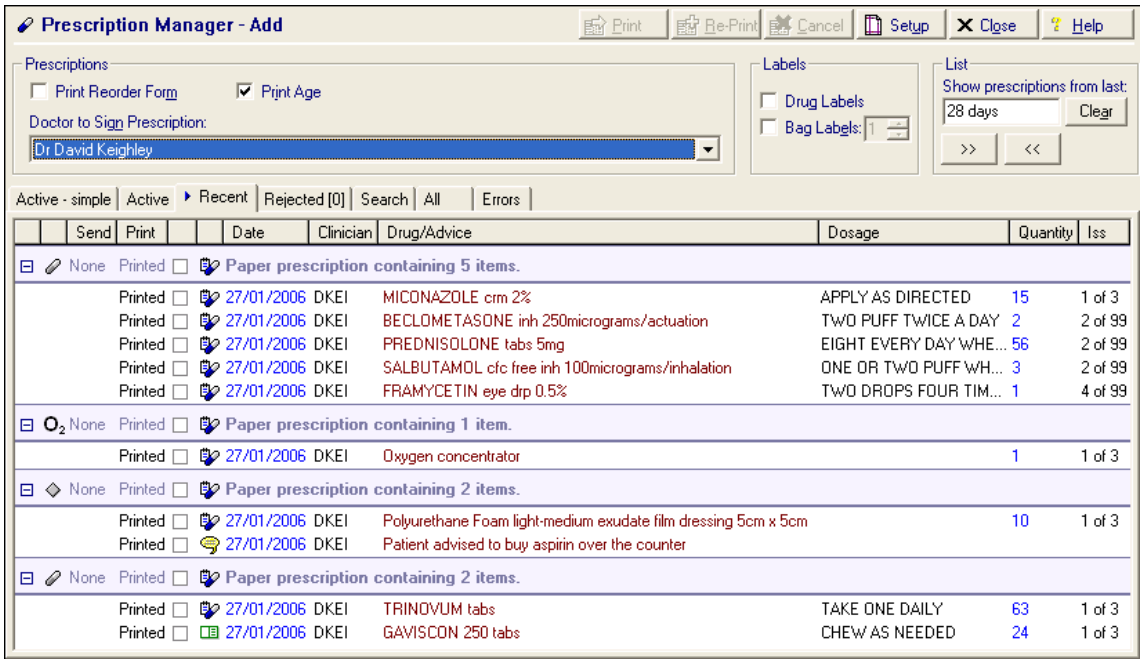
Recent Tab - used for reprinting

To reach the Prescription Manager screen, start from either the Current or Scripts tab and press on the Therapy toolbar. This reaches the Search tab on Prescription Manager.

Relevant for ETP-Active, the **Recent** or **Search** tab on **Prescription Manager** lists all recent prescriptions within the last 28 days, or since Prescription Manager was switched on, whichever is the more recent.

This is the tab you are most likely to use for reprinting prescriptions.

The exception is when you have just switched to using **Prescription Manager** in that drugs printed before the switch are not assigned to a prescription and so cannot be re-printed. Initially, the **Recent**, **Search** and **All** tabs are blank. In this case, in order to reprint an item issued before **Prescription Manager** was switched on, you should delete the original item from the therapy list, re-add and issue.



Using **Show prescriptions from last**, you can change the 28 days to another period, typing abbreviations such as 10d (10 days), 4w (4 weeks), 6m (6 months) or 1y (one year) (again it only displays from when Prescription Manager was switched on, if this was sooner).

Buttons enabled are **Reprint** and **Cancel**. Send status of Sent, Rejected, Cancelling, CancelFailed. The Print Status is Printed. Options include Date range, Deselect All.

Once printed, items have a status of **Printed**. Items with this status can be reprinted using

(see *Recent Tab - used for reprinting* (page 70) and *Search/Show Prescription Tab* (page 71)).

An item with the status of **Ready** means it has been issued (ie the first F9 or Print icon) but not actually printed. This item can be printed using

.

From the front Therapy list, select the drug you want to reprint and then select **Print**
.

To reprint an item:

1. Display the Prescription Manager screen (normally you would access the screen by pressing F9 having selected repeats for issuing; but you can also get to it by pressing F4 then F9 (start with the cursor in the body of the screen, not Read Term Add); or from the Current or Scripts tab by clicking on on the Therapy toolbar. Note, however, that from the Repeats tab, this icon is greyed out) and select the Reccent tab.
2. Make your selection by selecting the selection box on the blue header line (eg, *Paper prescription group containing 5 items)* and then deselecting any individual items you do not want to reprint.
3. Select **Reprint**

.
4. The word REPRINT appears above the drug name on the prescription.

Search/Show Prescription Tab

If you on the Current or Scripts tab, you can select **Show Prescription** which displays the **Prescription Manager** - **Search** tab. This lets you see printed items (printed since Prescription Manager was switched on) without having to select **Print** or F9. Note that the icon is greyed out from the Repeats tab (so you do not inadvertently make an issue of a repeat).

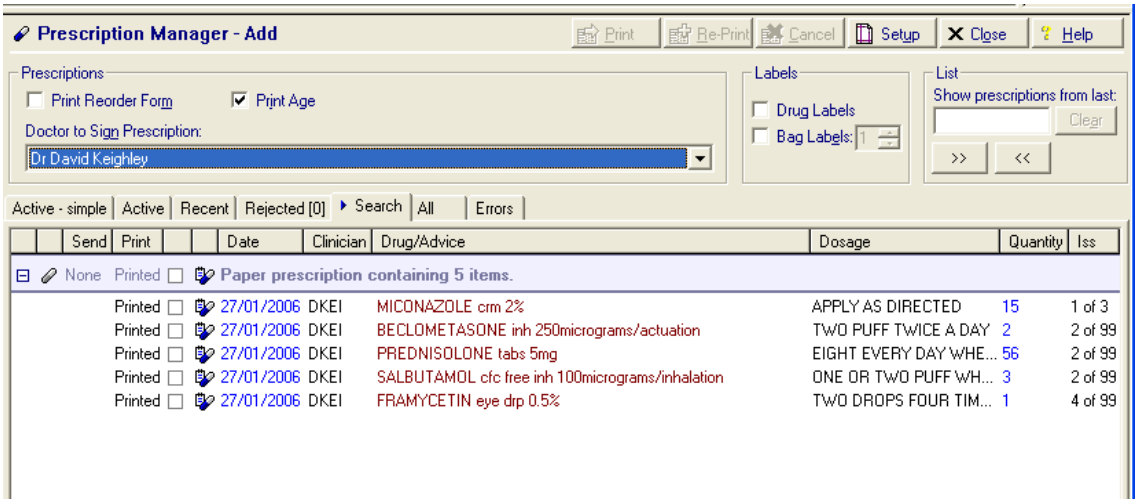
Once there you can use **Print**

if the prescription has not yet been printed; or **Reprint**

if the prescription has been printed (once Prescription Manager has been switched on, the Reprint icon is removed from the toolbar on the front **Therapy** screen).

From **Prescription Manager - Add**, first select the prescription you want printed by clicking on the selection box on the blue header line (eg, *Paper prescription group containing 5 items)* then deselect any individual items you do not want to reprint. Select **Reprint**

.



Note - The Search tab displays the text '*No prescriptions found*' if there is no displayable data.

All Tab

This lists all prescriptions for the past 6 months in reverse print date order. Once Prescription Manager has been switched on, only items issued since then are shown; when six months have elapsed from this date, any items older than this is unavailable, as before.

Prescription display defaults to collapsed but you can select ⊞ to expand a page list.

- **Print** Print is enabled if you have selected any pages ready for printing.
- **Re-Print** Re-Print is enabled if any selected items have already been printed.

Drug and Bag Labels can be printed.

Errors Tab

The Errors tab shows any prescriptions that fail to load. There is a range of error messages that can appear in this tab, and they all relate to loading prescriptions.

The Prescription Manager prescriptions show how the therapy and therapy advice items are grouped into physical prescriptions when the items are printed or sent (EPS). When prescription items are added in Therapy, they are allocated to prescriptions depending on the date, their type, etc. Once the prescriptions are printed/sent, the exact configuration is stored in the database.

Existing prescriptions and new items may be (re)loaded from the database when:

1. A patient is selected.
2. EPS is activated or deactivated from the Prescription - Setup dialog.
3. Therapy items are added, edited or deleted via the Therapy tab (or the Journal tab for Therapy Advice).
4. Prescription Manager is launched after the PDS status for the patient has been confirmed (depending on the EPS status and the PDS status).
5. An action is initiated from Prescription Manager (e.g. Print, Reprint, change script type (Paper <> Dual), ...)

The Errors tab lists any errors that have occurred while loading the existing saved prescriptions from the database or while allocating newly created items into new prescriptions. This may be because there has previously been a problem during printing and the prescription/item has not been saved correctly to the database because the process has been interrupted (i.e. Consultation Manager has crashed or there has been a bug).

In this situation there is generally nothing you can do to fix the problem, but access is provided to the error in case it explains a problem you are having. Sometimes deselecting and reselecting the patient clears the problem and this should be your first step after seeing an error.

For example, you might have tried to print an item, but Consultation Manager crashed, and now you can't reprint the item because Prescription Manager thinks the item has not been printed yet (and you cannot reprint an item until it has been printed).

All errors (including loading errors) that occur during an action initiated from Prescription Manager are shown in a popup error dialog, so you are actively notified of the problem. Only loading errors are shown in the Errors tab which are then highlighted.

Examples of likely errors you may see are:

- An item could not be determined - either the item has been deleted or its type has changed. Please deselect and then reselect this patient from the Consultation menu before printing or reprinting any prescriptions. If you encounter the same problem again please contact your System Administrator.
- A drug could not be determined - either the drug has been deleted or its type has changed. Please deselect and then reselect this patient from the Consultation menu before printing or reprinting any prescriptions. If you encounter the same problem again please contact your System Administrator.
- The patient information could not be determined. Please deselect and then reselect this patient from the Consultation menu before printing

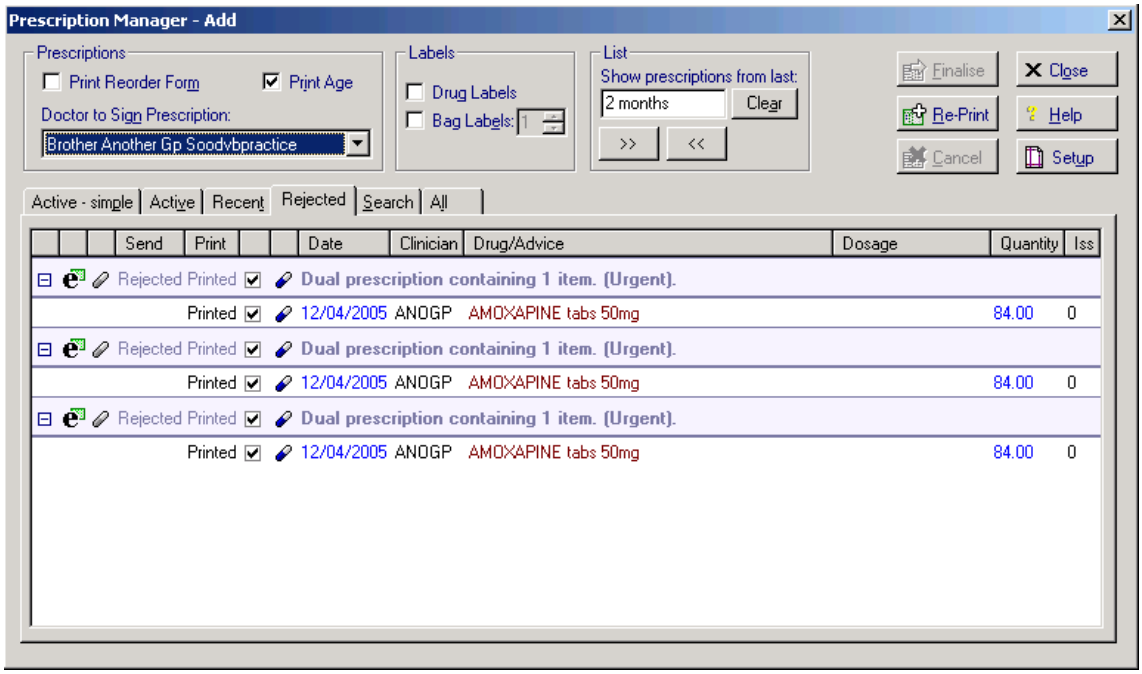
or reprinting any prescriptions. If you encounter the same problem again please contact your System Administrator.

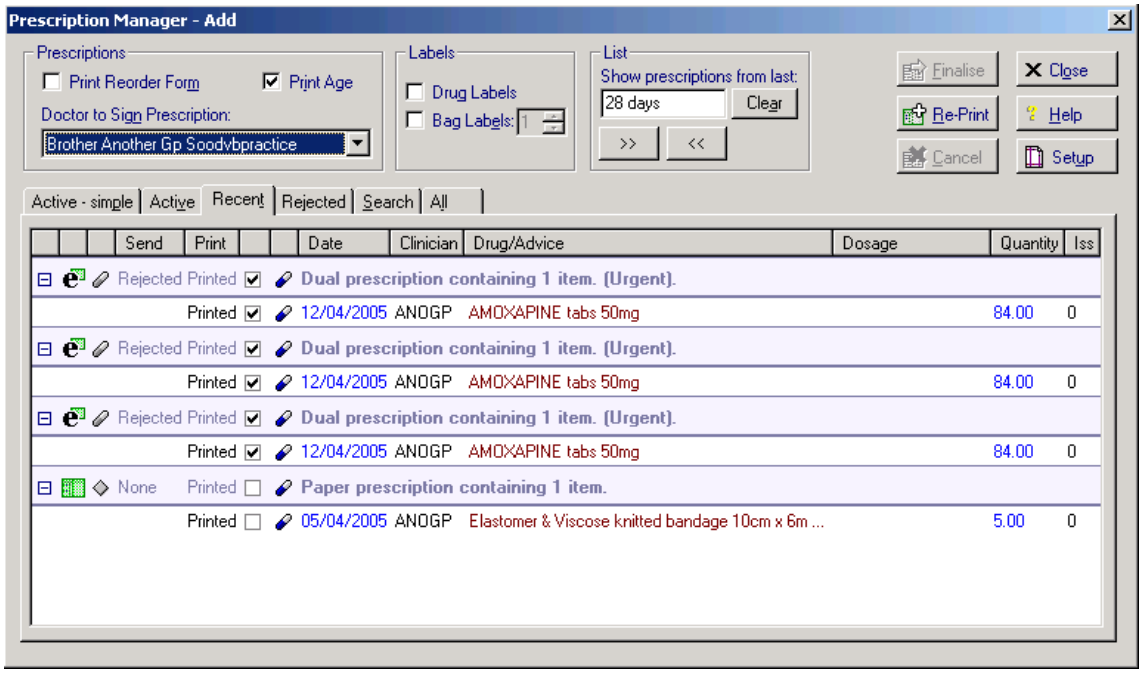
Rejected Tab

The **Rejected** tab on Prescription Manager lists all recently rejected messages, and rejected messages are also listed on the **Recent** tab. The Send status is Rejected and the Print Status printed. If a medication is entered with a blank Dosage field, the message is rejected by the EPS process.

You may only be aware of a rejected prescription after the patient has left.

You could edit the original Therapy record and then try printing that.





Rejected messages are also listed in Mail Manager.

Prescription Manager Functions

Selecting items

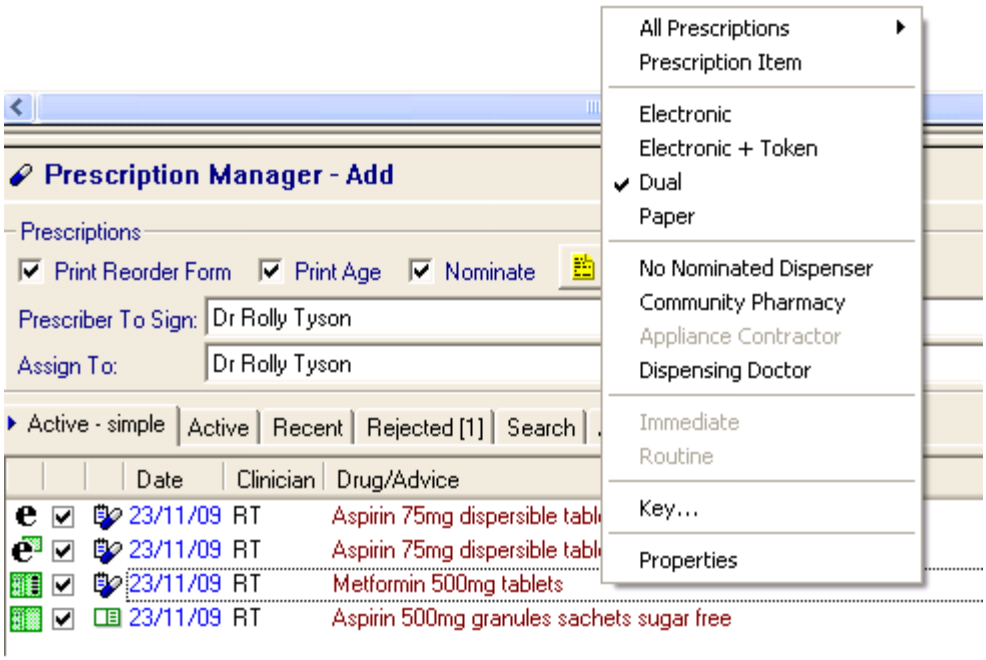
- **Selected** ☑ or not selected ☐ is the second column from the left on Prescription Manager. Any selected repeat issues and all acutes added today are automatically selected. This allows you to continue using the existing F9, F9 sequence to print.

  If you select or deselect an item, by removing or adding a tick in the second column from the left, then all the items within that prescription are selected or deleted accordingly. If the prescription has been part-printed, then only the unprinted sub-items are selected. You can deselect a sub-item on an individual basis. If on the Active tab, any item within a printed page is selected (for re-print), then all other items on the same page are selected; you can deselect individual items.

- **Select / Deselect All** - - Selects all prescription items, or deselects all.

Prescription Manager - Right Click Menu

You have a number of options when you right click on an item in the Prescription List:



At the time of prescribing you can change the following attributes from the right click menu:

- **Script type** - Electronic, Electronic + Token, Dual or Paper.
- **Nomination** – No Nominated Dispenser, Community Pharmacy, Appliance Contractor, Dispensing Doctor.
- **Urgent and Non-Urgent -** By default, all items are non-urgent, but you can right click on the blue prescription page header and change the status from non-urgent to urgent:

- **Non-urgent** - when you select Print/Finalise, the prescription is printed, and the message is sent when you deselect the patient at finishing the consultation.
- **Urgent** - when you click on Print/Finalise, the prescription is printed, and the message is sent immediately

Change Electronic to Paper

Right mouse click on a blue prescription header line and select Paper, to change from electronic to paper prescriptions.

Prescription Manager refreshes with new prescription page groups.

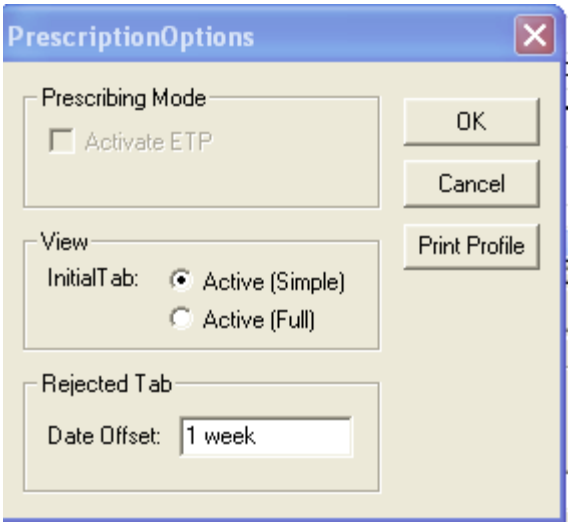
Change Urgency

Right mouse click on a blue Dual prescription header line and select either Non Urgent or Urgent to change the urgency of Dual prescriptions from the default of non-urgent to urgent:

- **Non-urgent** - when you select Print/Finalise, the prescription is printed, and the message is sent when you deselect the patient at finishing the consultation.
- **Urgent** - when you select Print/Finalise, the prescription is printed, and the message is sent immediately

Buttons on Prescription Manager

- **Finalise** - Select to print the selected items on FP10s, and if an electronic prescription, send the prescription message to the EPS.
- **Reprint** - Only enabled on the Recent and All tabs. Reprints are most likely to be carried out from the Recent tab. Select the item to be reprinted then either right click and select Reprint, or press the Reprint button. See *Reprinting prescriptions* (page 77).
- **Cancel** - In EPS Release 2 phase 3(but not EPS Release 2 phase 3 Deployed Disabled), this cancels a sent prescription and is applied to an individual prescription item or an entire prescription.
- **Setup** - The Setup button on Prescription Manager is the same as Prescription Options. This allows individual options with regards to EPS. Some partners may not be using EPS, and some may prefer the old Print Therapy screens. EPS is enabled for the whole practice in a hidden file.



- **Prescribing Mode - Activate EPS** - EPS can be enabled but may not be currently active, for instance, while waiting for initial EPS setup, or if the current session is not online to the National Services. Check this box for EPS to become active. When active, all eligible medication items default to EPS enabled. The clinician can, however, switch to paper prescriptions instead of Dual by using the right mouse menu.
- **View Initial Tab - Active (Simple) or Active (Full)** - This allows a choice of tab as the initial display of Prescription Manager.
- **Rejected Tab** – Allows you to select the default date offset for the Rejected tab.

- **Close -** Close the Prescription Manager screen.

Reprinting prescriptions

The Reprint operation applies to pages of prescription items that have already been printed and is most likely to be carried out from the Recent tab. Reprint can be selected in Prescription Manager as an option from a right mouse menu or by using the Reprint button from the Recent, Rejected or All tabs.

To Reprint an item:

1. Display the Prescription Manager screen (normally you would access the screen by pressing F9 having selected repeats for issuing; but you can also get to it by pressing F4 then F9 (start with the cursor in the body of the screen, not Read Term Add); or from the Current or Scripts tab by clicking on on the Therapy toolbar. Note, however, that from the Repeats tab, this icon is greyed out).
2. From Prescription Manager, select the **Recent** tab.
3. Make your selection by selecting the selection box on the blue header line (eg, *Paper prescription group containing 5 items)* then deselect any individual items you do not want to reprint.
4. Select **Reprint**

.
5. The word REPRINT appears above the drug name on the prescription.

Repeat Reorder Form

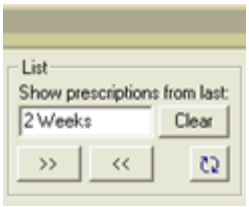
For electronic only prescriptions, Vision does not print the reorder form by default, instead this is automatically included in the prescription message. If you do want to print the reorder form simply select **Print Reorder Form** from the **Prescription Manager** screen.

Close Consultation Warning

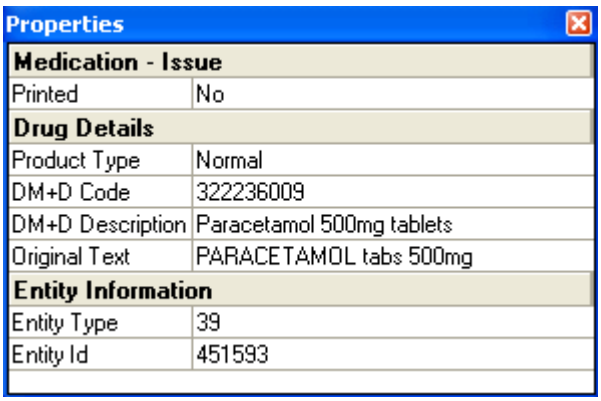
If a consultation is closed with unprinted or unsent items, then a warning is shown. This is the same as the current warning, with the text Print replaced by the text **Finalise**.

Other Options

- **Print Re-order form** – Tick to include a re-order form in the next finalise or re-print operation.
- **Print Age** - Mandatory so always selected.
- **Nominate** - If the patient has no nominated pharmacy, then this option is disabled and unchecked. If the patient has a nominated pharmacy, the tick box is checked. Remove the tick to change all active prescriptions to non-nominated which could convert electronic prescriptions into paper.
- **Prescriber To Sign** - A single prescriber is selected during any given print or ETP operation. This prescriber is set as the author within the prescription message, and is required to re-authenticate during the signing process.
- **Assign To** - This applies to electronic prescriptions and denotes the intended member of staff who is next in line to process the prescriptions. This defaults to the same as the signer, though it is possible to assign the patient's prescriptions to another member of staff if required. The selection is stored against the prescription record and used by the bulk prescribing view to produce the list of prescriptions to process.
- **Prescription Notes** - Allows you to add a note to be conveyed to the prescriber (ie if you are an administrative member of staff adding items to the patient record which need signing). Typically, this holds details of a requested change to the prescribed items. This uses the existing Vision reminders system and is shown alongside other reminders in the usual way.



- **Show prescriptions from last** - Above the prescription list is a new date range filter, so you can optionally list scripts within a recent date range on a tab, for example, the **Recent** tab, if you want to reprint an item. Each tab has a different period displayed: Active = 2 days, ie today and yesterday; Recent tab = last 28 days; All = last 6 months. You can change the period by typing abbreviations such as 10d (10 days), 4w (4 weeks), 6m (6 months) or 1y (one year) (note, it only displays items from when Prescription Manager was switched on, if this was sooner).
- **Clear** - clears the date range control. Date filters are removed from the list.
- **Select / Deselect All** - - Select all prescription items, or deselect all.
- **Refresh** - refreshes the message status manually.
- Select **Finalise or F9** to send and/or print the prescription and its message. Acute and repeat issues print on different prescriptions (this differs from practices who are not using EPS where acute and repeat issues print on the same prescription).
- Right click on a line lets you choose either **Key** which lists the drug type icons ( ) or **Properties**. This shows the DM+D code for that item - only items with DM+D codes are included in EPS while those without such codes continue to be printed as paper prescriptions.



- **Drug Labels** - If you want to print the dispensing label at the same time as the prescription, make sure this is selected. It is automatically ticked if the patient is marked as **Dispensing** in **Registration**.
- **Bag Labels** - For dispensing practices who want to print a non-drug-specific bag label to hold the patient's dispensed items, check the Bag Labels box. The default number of labels to be printed is set in **Modules – Drug Label Design**, but you can edit the number here.

Mail Manager and EPS

Practices should be regularly checking for rejected EPS messages in Mail Manager and reporting rejections to the Vision helpline at a regular interval (say weekly or fortnightly depending upon how many you are getting) so these can be investigated for the root cause.

Generation of the prescription message is undertaken by Mail Manager. Prescription Manager creates the XML message that contains all the data required by Mail Manager to generate a valid EPS message.

As with EPS 1, EPS R2 messages are sent and received via Mail Manager. There are two types of outgoing messages associated with EPS R2:

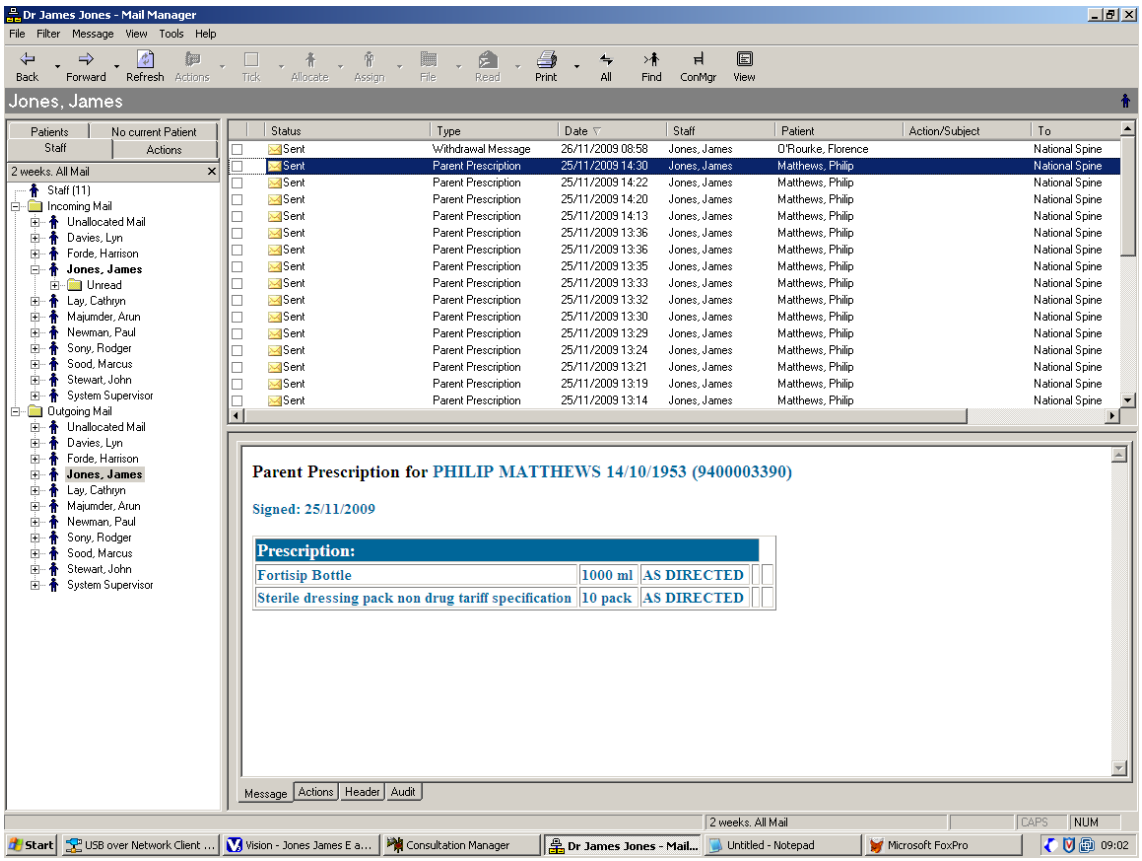
- **Parent Prescription Messages** - which carry prescription details and for EPS 2 Phase 3 only cancellation requests.
- **PDS General Update Messages** – which carry any nomination details (EPS Phase 3 only).

> **Note -** Practices should be regularly checking for rejected ETP messages in Mail Manager and reporting rejections to the Vision Helpline at regular intervals.

In **Tools - Options - Message** in Mail Manager, if you leave **Show Sent Electronic Prescriptions** unticked, this only displays messages that are unsuccessful or error messages, and hide successful messages; this improves performance and declutters your screen.

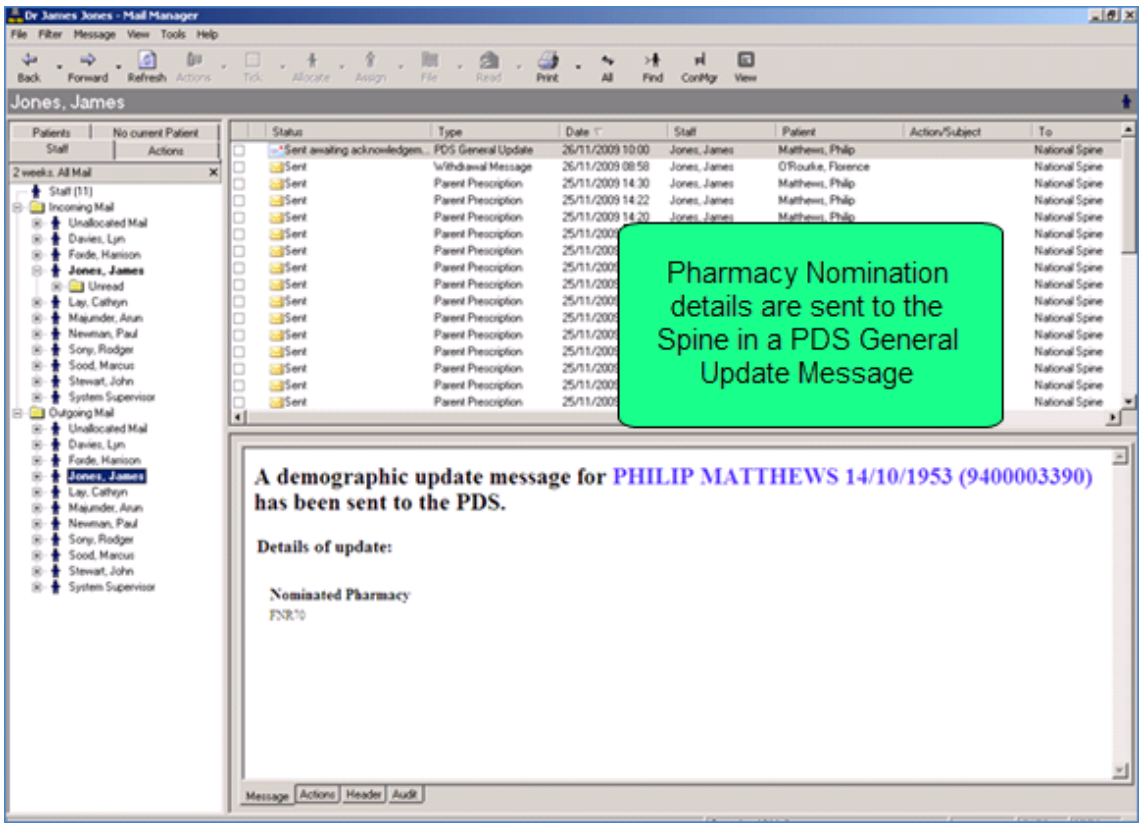
Prescription Messages

Generation of the prescription message is undertaken by Mail Manager. Prescription Manager creates the XML message that contains all the data required by Mail Manager to generate a valid ETP 2 message.



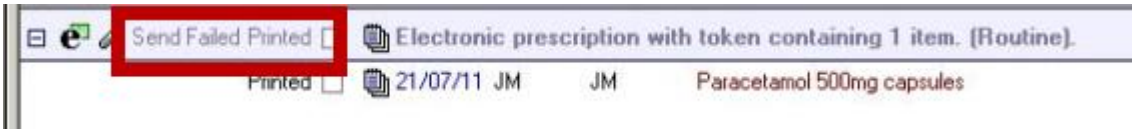
Nomination Messages

Nomination details are sent as a PDS General Update message as these details are stored on the Spine and not locally in Vision. As with all PDS update messages, they should be monitored for Transmission Errors.

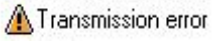


Send Failed Prescription Messages

Messages can have a **Send Failed** status in Prescription Manager. This can occur if your message handling system or the Spine is down or the message acknowledgement has timed out:



These messages can be resent from **Mail Manager:**

1. Locate the corresponding message (which has a status of Transmission Error 

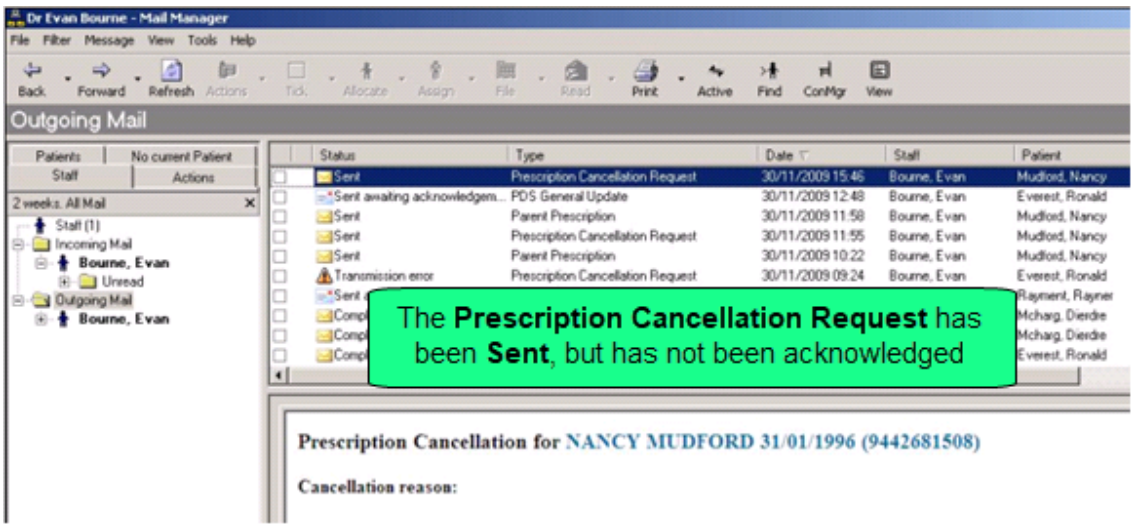
).
2. Right click and select **Reprocess**.

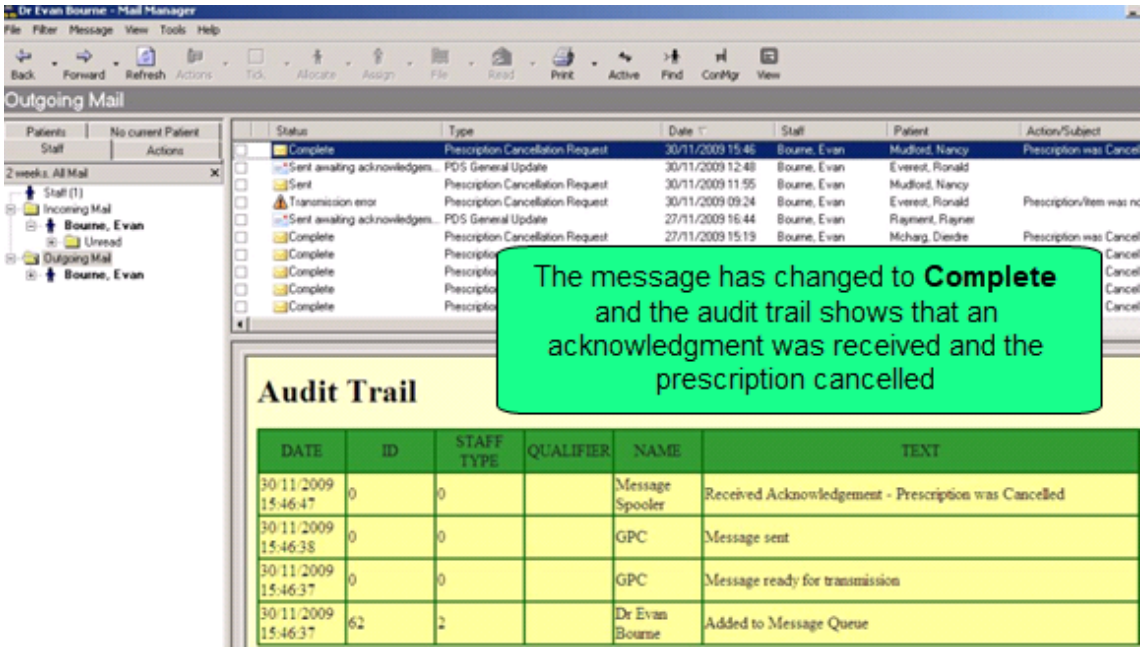
Please ensure that any communication/messaging problems are resolved before attempting this.

Cancellation Request Messages – Phase 3 only

When an electronic prescription is cancelled, a message is transmitted to the Electronic Prescription Service in a Parent Prescription Message. On receipt of the cancellation request message, an acknowledgement is sent back to Vision which automatically updates the message in Mail Manager to Complete.

> **Note** – Transmitted therapy is not deleted until a successful cancellation acknowledgement is received.





EPS FAQs

What is a dispensing appliance contractor?

- Dispensing appliance contractors, while not able to supply medicines, do supply various appliances such as incontinence and stoma products.

My carer usually collects my prescription for me. Can they request for nomination to be recorded on my behalf?

- Yes, but they need to know some of your personal information such as your name, date of birth and address to do this.

I use my paper prescription to request my next repeat prescription issue. How can I do this if I don't receive a paper copy?

- As electronic prescriptions are used more and more, GP practices may start offering different ways to order repeat prescriptions that do not require a paper copy of the prescription. However, if you do require a paper copy, simply ask for one when you collect your medication or appliance.

Can I nominate a chain of pharmacies or dispensing appliance contractors?

- You can only nominate a specific location to receive your electronic prescriptions.

Can I choose for my prescription not to be sent using the Electronic Prescription Service?

- Yes, but if you decide not to use it, you won't be able to use nomination. This means you need to continue to make arrangements to collect your paper prescription from your GP practice.

Electronic Repeat Dispensing FAQs

If a patient has already signed up to paper-based repeat dispensing, is there a need to repeat the consent process when transferring the patient onto electronic repeat dispensing?

- No, as long as the patient wishes to use the EPS and the process has been explained.

Will patients who are currently on paper-based repeat dispensing automatically be migrated to electronic repeat dispensing when the clinical system is upgraded to EPS Release 2?

- No. Patients who are currently on a paper-based repeat dispensing regime cannot be automatically transferred to electronic repeat dispensing, either when the system goes live, or when future repeats are required. Prescribers are encouraged to transfer suitable patients onto electronic repeat dispensing. In most cases the clinical system reminds them to do so.

Why are patients given a prescription token at the start of a repeat dispensing regime?

- The prescription token also acts as an 'aide memoire' for the patient if they have forgotten which pharmacy they have nominated. It also makes it easier for a patient to change their nomination part way through a repeat dispensing regime.

  If the patient finds they do not have a supply of medication (for example, if they are on holiday and forgot to take their medication with them), they can take their prescription token to any Release 2 enabled pharmacy to obtain their next repeat.

Can appliances be prescribed as part of an electronic repeat dispensing regime?

- Yes, however, currently dispensing appliance contractors are not permitted to dispense repeat dispensing prescriptions.

Can a patient change their nomination during an electronic repeat dispensing regime?

- Yes. Patients participating in electronic repeat dispensing and who have a nomination in place can change their nominated dispensary at any time.

How will a patient order their repeat prescriptions when the EPS is introduced?

- As now, arrangements for ordering repeat prescriptions are agreed locally. For example, some practices currently accept repeat prescription requests by phone, email, fax, or through online ordering systems. Others require patients to submit a paper request.

  It is up to GP practices to decide how they wish to handle requests for repeat prescriptions; it may be worth considering updating local processes.

When does an electronic repeatable prescription expire?

- As with paper based repeat dispensing, an electronic repeatable prescription has to be dispensed for the first time within six months of the date it was generated and is valid for 12 months from when it was written.

Cancelling FAQs

Can a dispenser cancel an electronic prescription?

- No. Only prescribers (or other authorised staff working in the GP practice where the prescription was generated) can cancel the electronic prescription. They can do this at any point up until the prescription is dispensed.

Can a single item on a prescription be cancelled?

- Yes. Electronic prescriptions can be cancelled on an individual item basis without invalidating the whole prescription.

Can an electronic prescription be amended?

- No. Once an electronic prescription has been sent to the Electronic Prescription Service it cannot be amended. If an amendment is required, the original electronic prescription or individual item must be cancelled, a new prescription generated (with a new prescription ID) and the patient informed.

Who is responsible for informing the patient if their electronic prescription is cancelled?

- It is the responsibility of the prescriber to ensure that the patient is informed if their electronic prescription is cancelled.

What happens if the patient attempts to collect their medication after the electronic prescription has been cancelled?

- When a dispensing contractor attempts to retrieve the electronic prescription, they are notified of the cancellation.

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