Quick notes for using the Trust System

Quick Notes for Users of the Blueteq Trust System

IFR / Prior Approval (PoLCV)

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

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

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

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

Contents

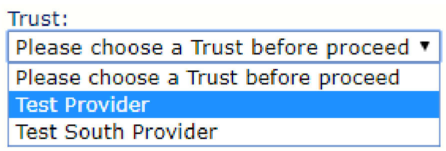
Logging into the system

To access the system,

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

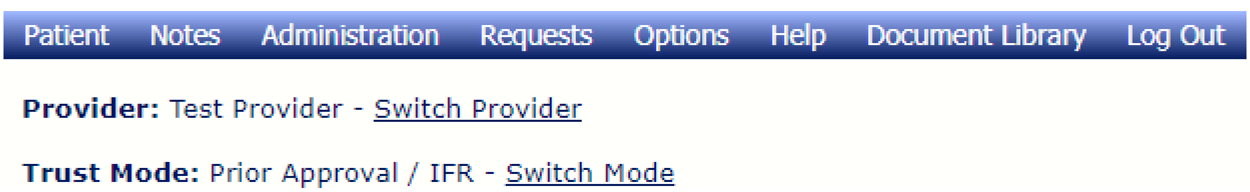
   https://www.blueteq-secure.co.uk/trust

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

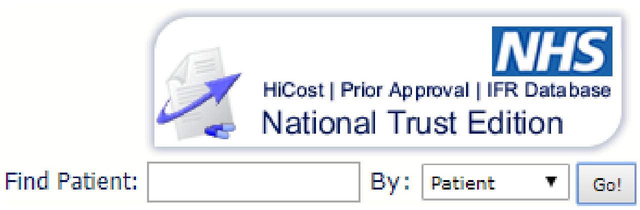


4. The system will appear, showing the default start page.

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



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



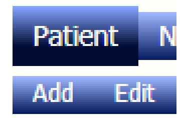
To find and select a patient, you must use the 'Find Patient' search box in the upper right hand corner of the web page. Within this search box you are able to search through different parameters such as,

- Surname
- DoB
- NHS Number

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

Patients

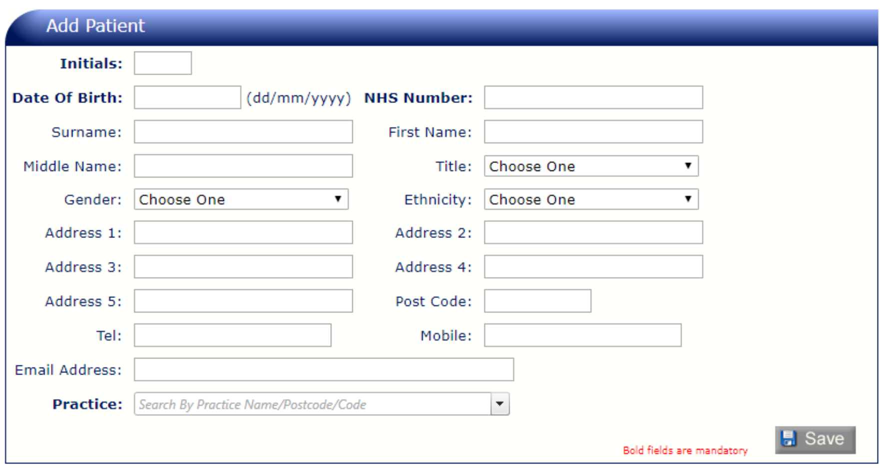
The first button on the menu bar is the **Patient** button. This button allows for the addition and editing and of all patients within the trust system.



Adding patient's details onto database

By navigating to **Patient** > **Add**, you are taken to the 'Add Patient' page. Using this page you can easily add new patients to the system by filling in the required fields and then clicking **Save.** The patient's details should now be added to the database and will be able to be found through the search function. In the case of Prior Approvals, only the **Bold** fields need to be completed. (Initials, DoB, NHS Number and Practice)

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



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

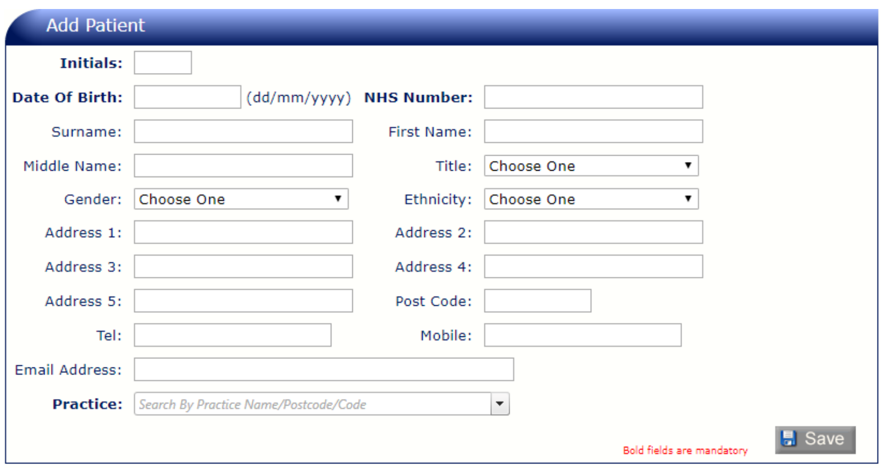
Searching and Editing patient details

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

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

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

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



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

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

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

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

Uploading a request

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

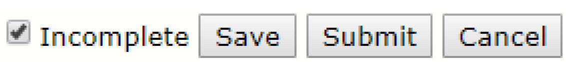
1. Click on **Requests** and **Upload** menu options. This will take you to the **Add Patient** screen (described above). Once you have saved the patient's details it will take you to the *Referral Details* screen.
2. From a Patient's notes, click on the **Add Request** button. This will skip the first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

Adding a request

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

6. You will be presented with a choice of form type. Choose **"On-Line Form"**
7. You will now be shown the Form Selector Screen. You can search the tree by clicking on the '+' symbols to open the folders. Use this method to find the form that you are looking for.

8. Once you have found the relevant form, click on the form name to open it.
9. Fill in the form with all details (If the form is incomplete and you wish to save it, check the 'Incomplete' checkbox next to the **Save** button at the bottom of the form. Then click **Save**



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

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

Submitting a 'pending' request form (For Authorisees)

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

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

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

Notes (Patient Notes)

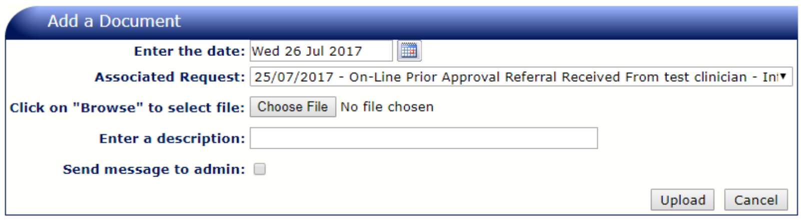
The patient notes page displays all data relevant to the currently selected patient. You will notice on the top of the Patient Notes page there is a set of options above the main notes.

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

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

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

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



  - Select the Associated Request
  - Click on **Choose File** and select the relevant file from either a local folder on your computer, or a shared folder
  - Type in a description of the file within the 'Description' text box
  - Tick the **Send message to Admin** checkbox to alert admin of the upload

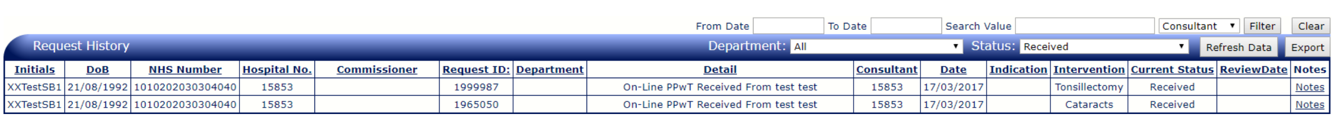
- **End of Treatment** – This option is used to end a line of treatment, clicking on that option opens a new window where you can highlight the request you want to cancel the date and the reasons for end of treatment there is an additional comments boxes which can also be used. Click the Confirm End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

Administration

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

Request History

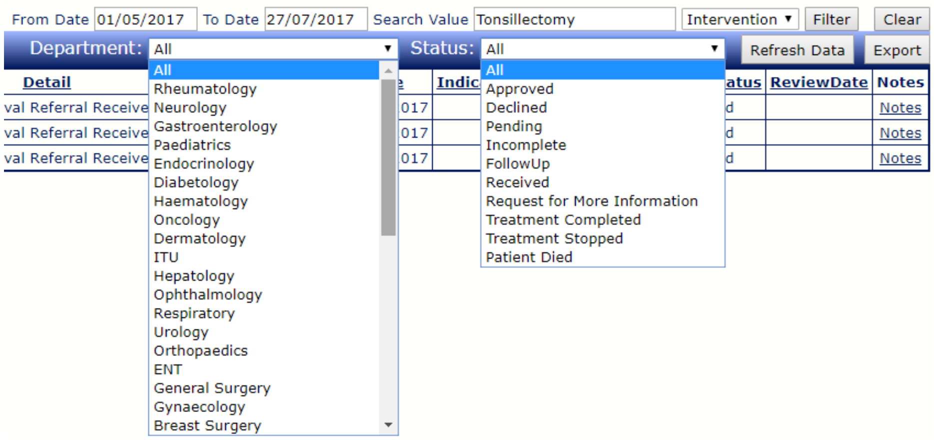
To view the request history for your Trust, (including a request's current status), click on the **Administration > Request History**. By default you will be shown the "Received" requests but you can change this by choosing ''All'' or ''Pending'' from the Status dropdown list to the upper right of the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



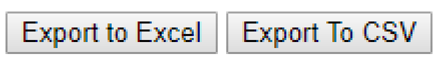
Initials	DoB	NHS Number	Hospital No.	Commissioner	Request ID:	Department	Detail	Consultant	Date	Indication	Intervention	Current Status	ReviewDate	Notes
XXTestSB1	21/08/1992	1010202030304040	15853		1999987		On-Line PPwT Received From test test	15853	17/03/2017		Tonsillectomy	Received		Notes
XXTestSB1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

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

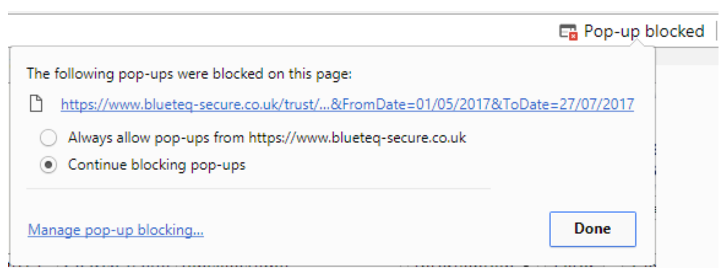
An example of the filters in use is below.



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



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



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

Messages for Admin

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

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

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

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

Follow Up List

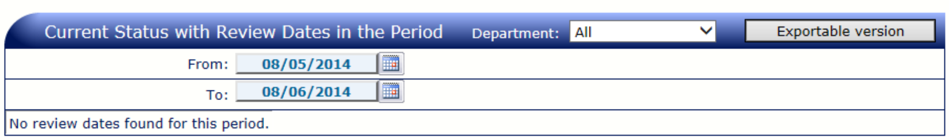
The follow up list page produces a list of all patients that are requiring a follow up or review for current Trust. It is accessed via **Administration > Follow Up List.**

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

All Patients that have a Follow Up Status	Exportable version	Department: All					
Initials	DoB	NHS Number	Hosp Number	Intervention	Department	Consultant	Notes

Review List

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



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

Reports

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

Creating a report is very simple using this menu.

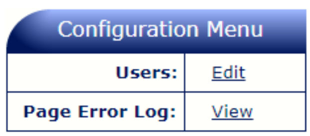
1. Set a 'From' and 'To' date
2. Choose the desired CCG

3. Click on **Run**

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

Configuration Menu

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



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

Users without 'Super User' rights

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

- Full Name
- Job Title
- NHS.net Email address
- Password & Reset required checkbox

Users with 'Super User' rights

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

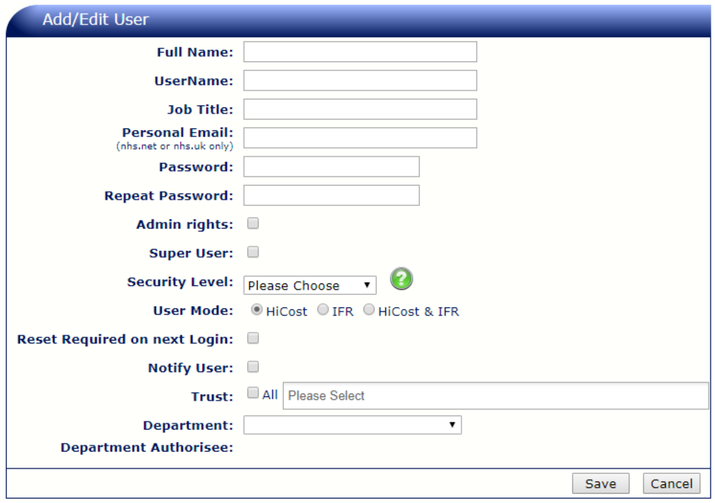
Clicking the **Add** button will bring up a blank Add/Edit User page. You can then simply add in the relevant details of the user that you wish to add and click **Save**.

Full Name - Full Name of the user

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

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

Password - Minimum of 7 characters.



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

Admin Rights - Allows access to the Configuration Menu.

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

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

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

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

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

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

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

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

Editing Users

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

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

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

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

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

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

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

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

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