

# MEDICINES MANAGEMENT

## SystemOne Guidance

**This Guidance covers how to:**

- Run SystemOne Reports identified within the QSCE Plan
- Send Bulk Messages, and/or
- Complete Bulk Actions to Lists of Patients

## Background

The **Dorset Medicines Quality, Safety & Cost Effectiveness (QSCE) Plan** allows PCN teams to deliver high quality, best value care, in terms of patient outcomes and financial sustainability.

- Each element of the QSCE plan (found here <https://nhsdorset.nhs.uk/medicines/value/>) lists actions to be taken within SystemOne.
- This guide outlines how to complete SystemOne tasks e.g. run reports, generate patient lists, send patient communications and bulk change patients' medications.
- The patient communications provided in the QSCE plan (text messages & letters) have been added to SystemOne – this guide also shows you how to access them.

Please contact: [003023d5.nhsdorsetccg.onmicrosoft.com@uk.teams.ms](mailto:003023d5.nhsdorsetccg.onmicrosoft.com@uk.teams.ms) for further information or if you need support with a different element of SystemOne.

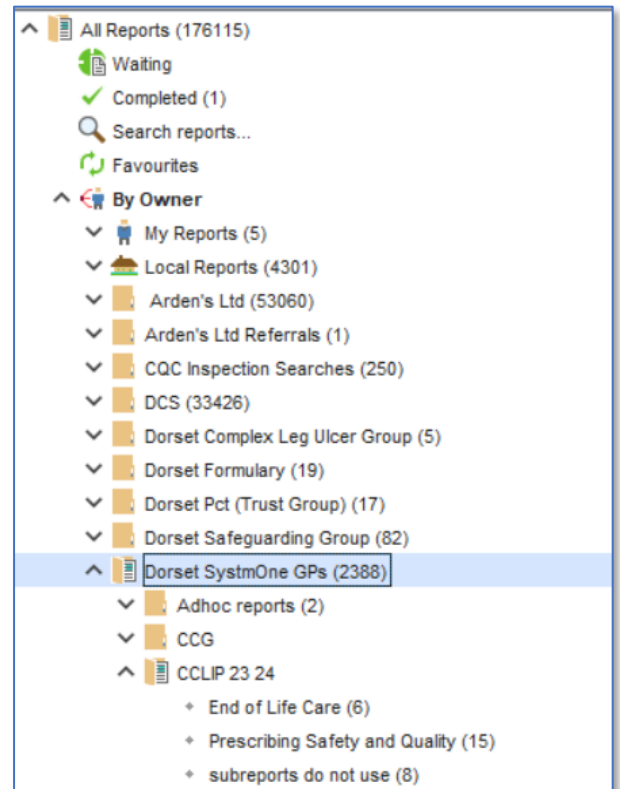
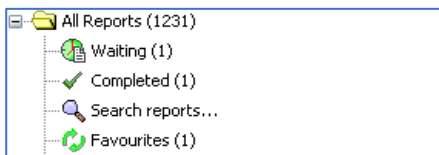
## ACCESSING CLINICAL REPORTS AND RUNNING

All reports must be run before any actions can be completed.

1. From the **Reporting menu**: Select **Clinical Reporting**.  
The Clinical Reporting Screen will be displayed.
2. Use the **Reports Tree**, on the left-hand pane of the screen, to **find the report required under the Dorset SystmOne GPs Folder**, then select the subfolder containing the report required. e.g., **Dorset SystmOne GPs > Medicines optimisation > Quality Safety Cost Eff 23 24**
3. Select the report to run in the right-hand pane.
4. Click on the **Run Report** button **OR** right-click and select **Run Report**.

The icon in the **Flags** column of the screen changes to the **wating to run** Icon to indicate the report is currently being run.

The report is displayed in the **Waiting** node of the Reports tree until it has completed.



Once the report run has been completed a **green tick displays in the flag column**.



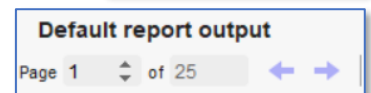
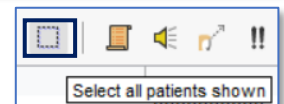
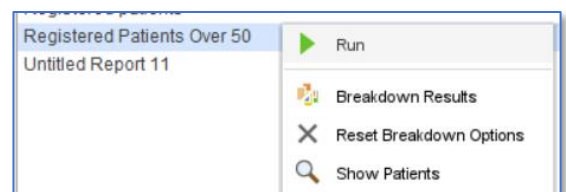
The report is now ready to complete whatever action or actions are required.

## DISPLAYING A LIST OF PATIENTS FROM A RUN REPORT

### Show and Select Patients from the Run Report

1. **Right click** on the **report** and select **show patients**.  
A list of patients from the report are now displayed.
2. From the **reports toolbar**, click the **“select all patients shown”** button.

**Please note**, the list will only display 250 patients per page, therefore you may need to work through the patient lists one page at a time. Use the Page arrows to move between the results list.



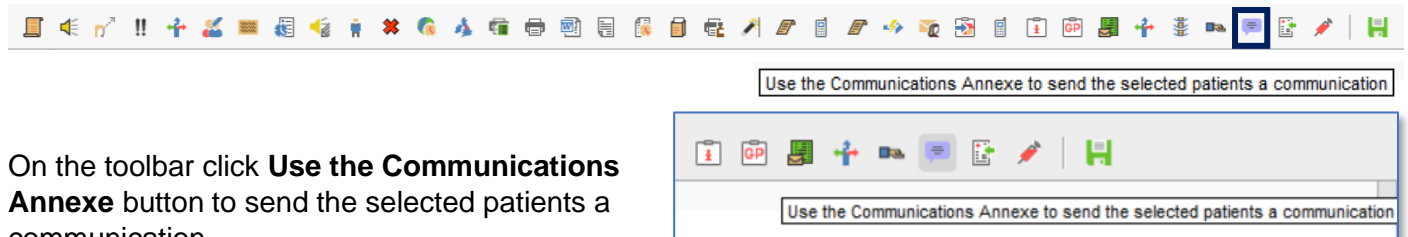
From the selected list of patients, you are now ready to complete whatever action(s) are required by selecting the relevant button on the toolbar above.

**Please see other options below to send to a list over 250.**

## SENDING A MESSAGE TO PATIENTS FROM A LIST VIA THE COMMUNICATIONS ANNEXE

This is the pathway you need to take to send patients a message. The message will be sent to the patients preferred method of communication e.g., sms, email or Airmid App only.

**Note:** If the patient has selected their preferred method as Letter and has no mobile number or Airmid app, the message will not send to them. However, you will be alerted after sending the message.



On the toolbar click **Use the Communications Annexe** button to send the selected patients a communication.

**NOTE: Alternatively,** if your list of patients is over 250 patients, click Close, then right mouse click on report > select Actions > Use Communications Annexe. This will then send to all patients retrieved from the report.

### Complete the Communications Annexe box

1. **Tick** Use preferred contact method if set .....
2. **Choose the send method** from the drop down if a preferred contact method is not set up for any patient in the list.

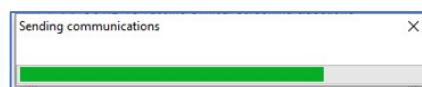
### Add Preset Message

1. **Next to Preset, click** on the **preset icon** and select from the list. For example, navigate to **NHSDo, Medication Management** and select the required preset, then click Ok.



This action will add the message, merge fields, and text to the message field, with a subject if the send method is via email. **You can also add or remove as required.**

2. Click Send.



**Please note** that if sending via sms and the message is longer than 306 characters, there is red text above the send button explaining how many messages are needed to send the whole message via sms.

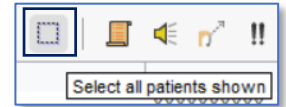
### Send Error Messages

Carefully read any error messages and respond accordingly. Note down any patients that the system has been unable to send to. For example, a patient only has a land line or letter recorded as their method of communication. In this instance you would then contact the patient to confirm their contact details. If they do only have a landline, please see instructions for sending them a letter.

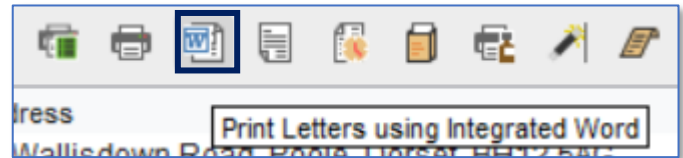
## SENDING A LETTER TO PATIENTS FROM A LIST

**Please Note:** We would suggest that you create a folder to save all the letters into to make printing later easier. All letters will automatically be saved directly into the patient record and finalised. The letter must exist on the system.

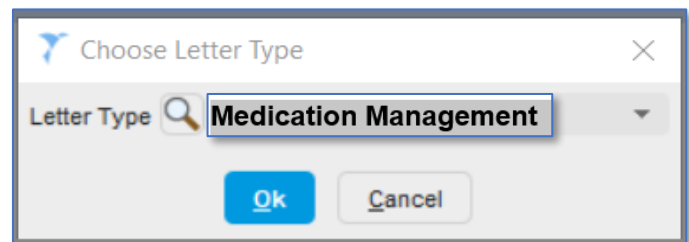
1. From the **Reports toolbar**, click the “**select all patients shown**” button **OR** if the letter only needs to be sent to some patients hold down the **Ctrl key** and **click** on each patient in turn to select. **Ctrl+click** if a patient is selected in error.



2. On the toolbar click **Print Letters using Integrated Word** button.

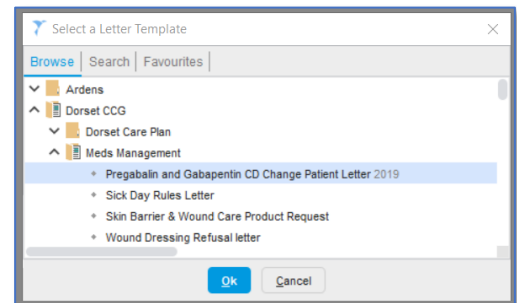


3. The **Choose Letter Type** box displays. Select **Medication Management** from the drop down menu.



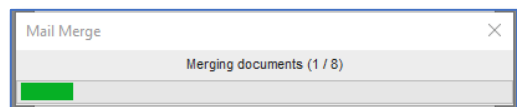
4. Click **Ok**.

5. Navigate to the folder the letter is in. Select letter, then click **Ok**. A message displays informing you word is loading.

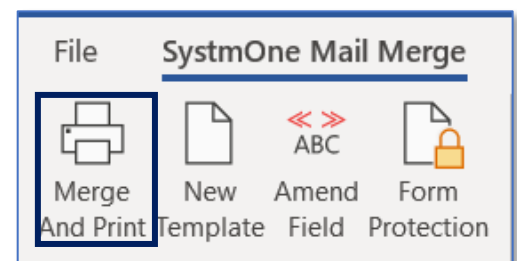


6. Check the letter. You can add or remove data. If there are any form fields, turn on **Form Protection**. Turn off when you have finished updating.

7. Click **Merge and Print**.



8. The letters will be printed and saved to the patient record.



## BULK CHANGING A PATIENTS MEDICATION TO AN ALTERNATIVE

This action can only be undertaken by staff with 'Senior Manager' access rights.

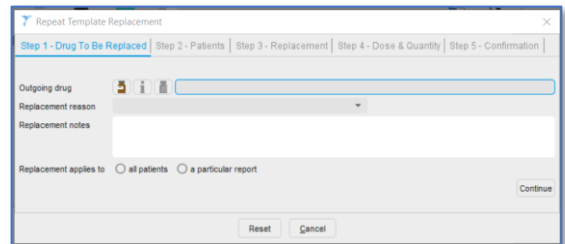
This can be done by either finding all those patients on the medication **or** all those patients that are in a particular report. Only patients from the last building of reports will display; reports are normally generated the evening before, therefore any patients prescribed the medication on the day you run the bulk change will be missed.

### THE REPORT MUST BE RUN FIRST BEFORE STARTING THE BULK OPERATION

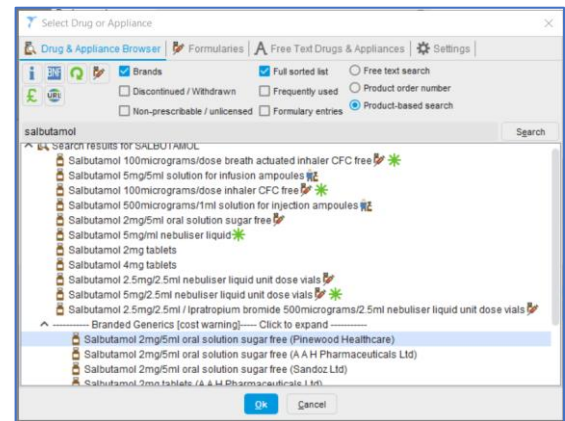
1. Go to **Setup > Bulk Operations > Repeat Template Replacement**.

The Repeat Template Replacement box displays.

2. Next to **Outgoing drug**, click on the **medicine bottle**, then click on **Drug & Appliance Browser**.

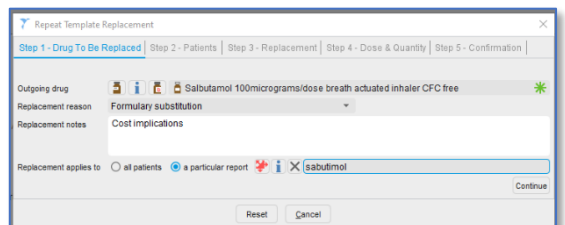


3. In the **search box type in the name of the current drug**. In this example salbutamol. If the current drug is branded, scroll down to Branded and click to expand.




4. Select **current drug from the list**, click Ok.

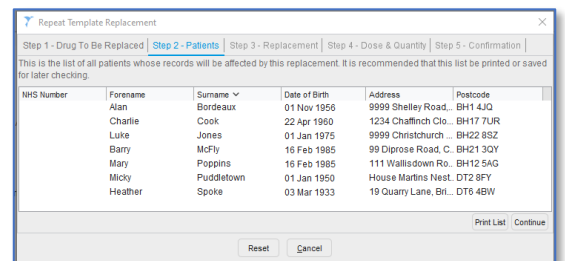
5. Select **Replacement Reason** e.g Formulary substitution.



6. Enter **replacement notes**. **This is an essential step. Documentation here demonstrates governance of changes made.**

7. **Replacement applies to:** select either all patients or a particular report. In this example we will select a **particular report**.

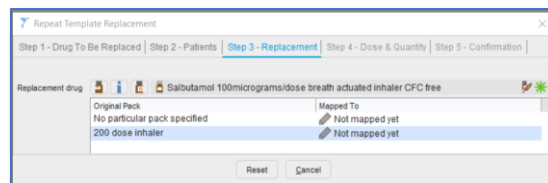
8. Click . Navigate to your report. Select, then click Ok.



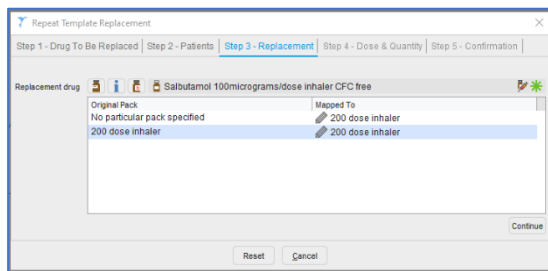
9. **Click Continue**. A list of patients found in the report will display. Click Continue. The Repeat Template replacement box opens, with a list of patients affected by this replacement.

10. Print list to enable checking later. Click **Continue**

11. Click on bottle to select replacement drug. Search for medication replacement. Select. Click Ok

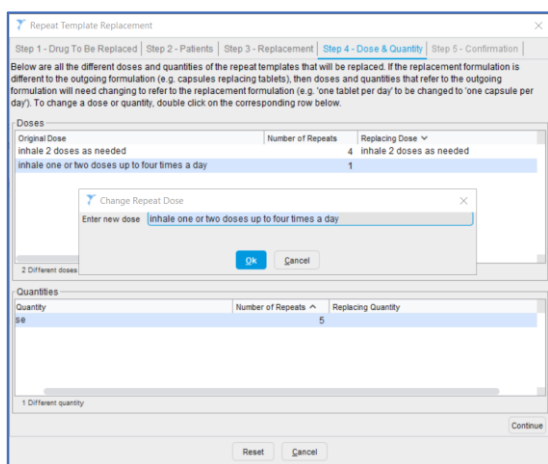


12. A list of the different pack sizes is displayed with 'Not mapped yet' beside each one.



13. Click on 'Not mapped yet' and select the appropriate option from the drop down menu for each entry.

14. **Click Continue** to go to Step 4 of the process. The different doses and quantities of the repeat templates to be replaced are displayed. If the replacing formulation is different to the outgoing formulation (for example capsules replacing tablets), you must change the doses and quantities that refer to the outgoing formulation to refer to the replacement formulation (for example 'one tablet per day' to be changed to 'one capsule per day').



15. To **change a dose or quantity**, double click on the corresponding row and type the new repeat dose or quantity as required or select then leave as current.

16. **Click Continue** to go to Step 5 of the process. A summary of the changes you have made is displayed. Check the details carefully to ensure they are correct.

17. **Click Run** when you are satisfied with the changes you have made. A message is displayed to indicate when the bulk operation will take place.

18. **Click Ok** to acknowledge the message.