

## Home Delivery Service (HDS) Guidance Notes

### Version 4

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## General information






Information in this document is taken from our test system. Any correlation to actual orders or people is purely coincidental.

### What's new in HDS?

- Multiple callback prescriptions can be confirmed simultaneously for people living in their own homes. See 'Confirming requirements (callback prescriptions)' on page 59.
- Deaths of patients in care homes can be recorded as part of the callback procedure. See 'Recording a death when confirming callbacks for patients in care homes' on page 43.
- Delivery instructions recorded in the Delivery instructions section of the patients record (see 'Providing delivery instructions' on page 36) are now shown on the
- 'Patients on service' report (see page 69).
- The Patient Reassessment Form now includes product brand names and product MPCs at the end of the product descriptions. See 'Patient reassessment report' on page 67.













## Key to icons

### Data entry icons



	Use the calendar to select a date
	Clear the date from the box
	Create
	Delete
	Edit

### HDS icons





	Manage prescription delivery schedule
	Callback pending
	Callback confirmed
	Save
	View
	Add
	Alert error
	Alert success
	Alert warning
	Authorise
	Delivery failed

	Enlarge
	Held
	Information
	Delivery information
	Outstanding delivery information
	Confirmed delivery information
	Delivered via HDS Direct
	Print bulk pick list
	Print individual pick list
	Print delivery invoices
	Print care home invoice or delivery note
	Patient suspended

### Exporting information icons

	View/print document in PDF format (see tooltip for details of the document)
	Download information in CSV format (can be opened as a spreadsheet)

### Patient and prescription icons

	Review patient
	View care home details
	New prescription
	Emergency order

## System messages

System messages are shown towards the top of the web page. Notifications are shown in yellow, confirmation messages in green, information in blue and errors in red.

 The NHS-Cat website is temporarily closed whilst we refresh NHS catalogue. Please try again in a few minutes 

 Assessor 'Amanda Smith' created successfully. [Click here](#) to return to the Assessor List

 6 authorisation emails sent

 Care home has no upcoming deliveries. [Click here](#) to return to the Care Home list

## Abbreviations

AWSL Available While Stocks Last

HDS Home Delivery Service

MPC Manufacturer's Product Code

NPC National Product Code

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## Overview

The Home Delivery Service (HDS) enables orders and prescriptions placed for patients to be delivered either to their own homes or to a care home.

### Who uses it?

HDS is used both by patient assessors (often health care professionals involved in a patient's care) and by suppliers and distributors to provide a coordinated service. Each user of the system is granted one or more 'roles' – these enable that person to carry out various tasks. The allocation of these roles is under the control of your organisation, and those appropriate to HDS are described in more detail in 'Roles' on page 9.

### How does it work?

Patients are registered on the system and are prescribed products to be delivered to a designated address. To meet patient needs, deliveries can be arranged to an alternative address or other special delivery instructions can be recorded.

Details of care homes are recorded on the system so deliveries can be coordinated when several patients live at the same one.

Patients are allocated to assessors, who create prescriptions for them. Delivery of the products on the prescriptions can either be automatic (the same quantity is delivered at regular intervals) or use a call-back mechanism (the delivery of a quantity is prescribed but the patient or the patient's representative telephones to confirm the quantity required).

## Entering and viewing information

Similar methods are used throughout the HDS application for viewing and entering information. These methods are summarised in this section.

- Anywhere you see a patient name as a hyperlink, click it to go to that patients record.
- Anywhere you see the care home symbol ( ) alongside a patients name, click it to open the record for the care home where he or she lives.
- Links in the alerts section on the front page open a list of the patients or prescriptions forming that group.

## Select items from a list

If you need to select multiple entries from a list, you can:

- Click the first item you want, hold down the SHIFT key and then click the last item to select a range
- Hold down the CTRL key while you click items to select multiple items that are not next to each other in the list

Some lists only allow you to select a single item.

## Move items between one box and another

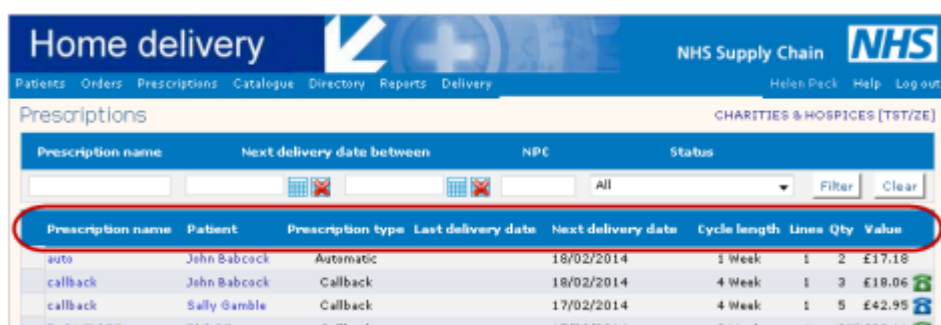
To move items between lists of available items (not yet selected) and selected items:

1. Select the items you want to move.
2. Click the arrow (< or >) to move the items in the appropriate direction.

If you want to move all the items, click the > All > or < All < buttons.

## Sort a list

In many cases, you can click on the column heading to sort information by that column value. For example, if the column contains dates, earlier dates will be shown at the top of the list.



Prescription name	Patient	Prescription type	Last delivery date	Next delivery date	Cycle length	Lines Qty	Value
auto	John Babcock	Automatic		18/02/2014	1 Week	1 2	£17.18
callback	John Babcock	Callback		18/02/2014	4 Week	1 3	£18.06
callback	Sally Gamble	Callback		17/02/2014	4 Week	1 5	£42.95

Click the column heading again to reverse the order. Using the same example, later dates will now be shown at the top of the list.

You can sort a listing by any column heading that is underlined.

## Where your order comes from

When you order products using HDS, you receive them in one of two ways:

- They are sent by the supplier to a distributor, who then sends them on to you.
- The supplier delivers them directly to you.

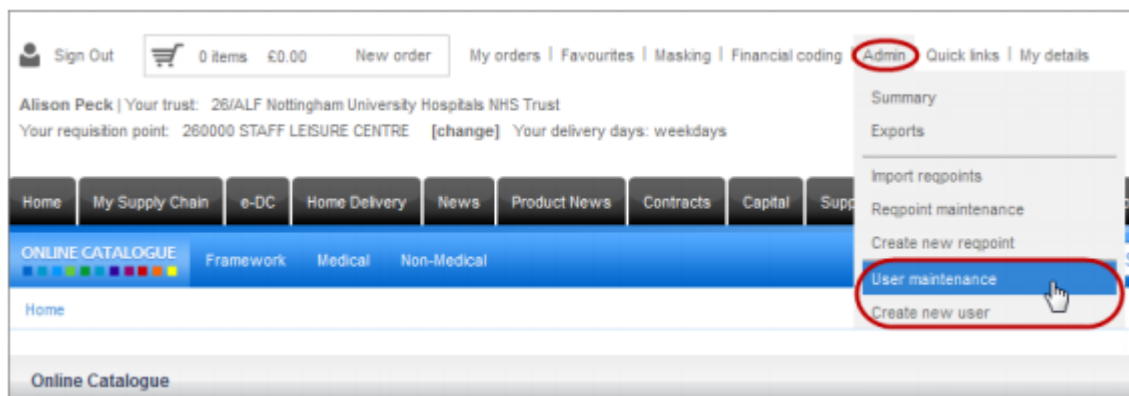
## User accounts

You must have the *Trust administrator* or *User maintenance* role to be able to change other people's user accounts. If you do not have either role, you cannot see this area.

The same user account can be used to access all of the NHS Supply Chain applications – people are granted or denied access to specific components by granting them 'roles'.

User records are created and modified in the Online Catalogue and Ordering application:

- To create a user record, select **Create user** on the **Admin** menu.
- To amend a user record, select **User maintenance** from the **Admin** menu.

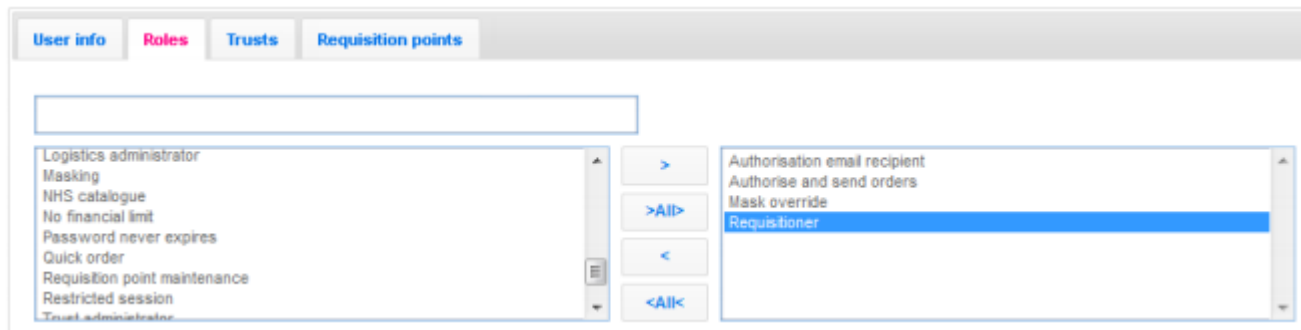


See the Online Catalogue and Ordering Guidance Notes for detailed instructions.

## Roles

Roles determine what a person can do when logged on to the NHS Supply Chain applications. You can move roles between the two boxes using the arrow buttons between them – the box

on the left contains unassigned roles, and the box on the right contains those assigned to this user account.



A summary of the HDS roles and what they enable people to do is given in Table 1.

**Table 1: Summary of roles**

People with this role...	can do this...
Connect	Access the system – this role is granted automatically.
Authorise and send orders	Authorise and send orders up to the financial limit set in their record. People with this role must also have the Requisitioner role.
No financial limit	Order without any financial limit.
HDS Enquirer	View the system only and can update or create patient notes.
HDS Assessor	Create patients and prescriptions, confirm and unconfirm callbacks, and create emergency orders.
HDS Administrator	Activate the unconfirm call back option, issue global prescription updates and use the manual address option.
HDS Customer Services	Do the same as the HDS Assessor, plus access the reports on the Delivery menu. Note: Some trusts provide their own customer service function, so have access to this role. Others use Customer Services within NHS Supply Chain.

## Logging into the Home Delivery Service (HDS) system

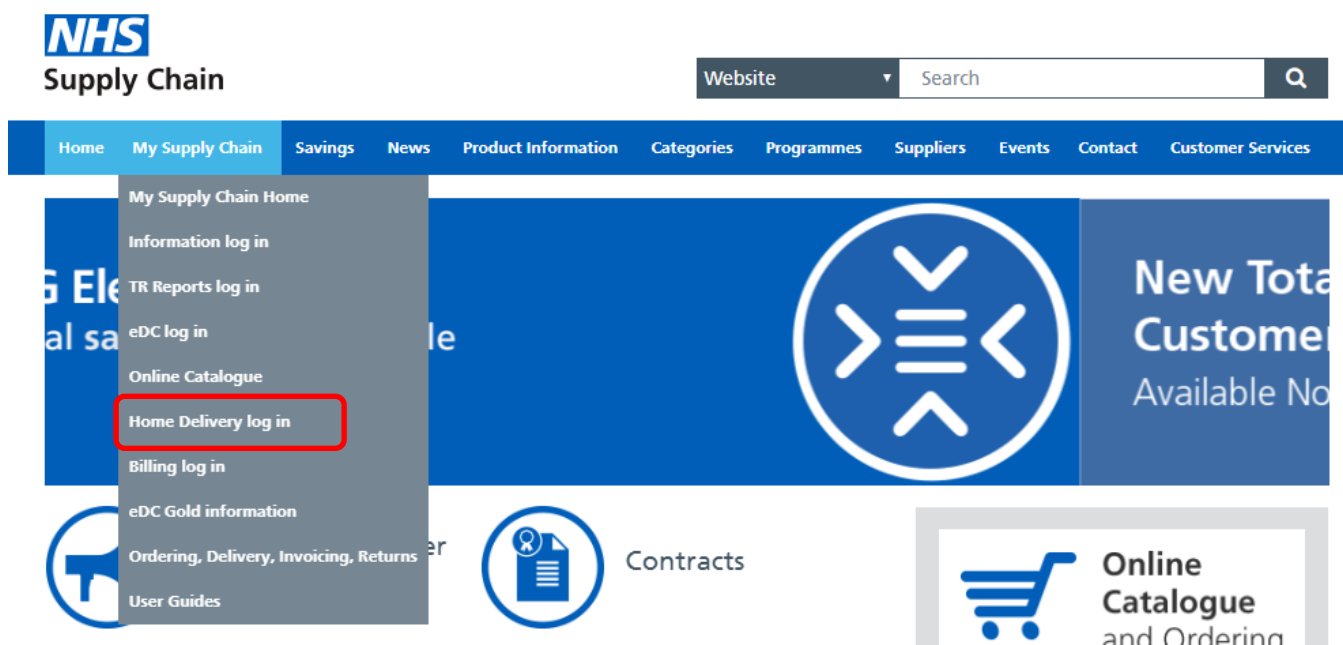
You must have a role that enables you to access the HDS system to log into it.

## Connecting to NHS Supply Chain's website

To connect to the NHS Supply Chain website:



1. Connect to NHSNet through your local network:  
Follow a shortcut where available or type <http://www.supplychain.nhs.uk> into a browser.
2. Optionally, click [My Supply Chain](#). The My Supply Chain drop down menu then opens.
3. Click [Home Delivery login](#).



4. If you are not already logged into the NHS Supply Chain applications, you must do so now.

The screenshot shows the 'Home delivery' login page for the NHS Supply Chain. The page has a blue header with the text 'Home delivery' and the NHS logo. Below the header are two input fields: 'Please enter your username' and 'Please enter your password'. To the right of the password field is a link that says 'Forgotten your password?'. Below the input fields is a 'Login' button. At the bottom of the page, there is a disclaimer: 'This application requires either Microsoft Internet Explorer 6.0 or above, Mozilla Firefox or Mozilla 5.x or above. Any other configuration is not supported and may mean that you are unable to use this application properly.' and 'Important - please note: Unauthorised access to data on this system will constitute a breach of the computer misuse act 1990 and, as such, will render the offender liable to criminal prosecution. You must not exceed the legitimate bounds of your authorised access and under no circumstances disclose your password to a third party'. At the very bottom, it says 'Single Sign On v1.1.21.0/v1.1.309.0 201/uk Production'.

If you are already logged in, the Home Delivery Service homepage opens.

### Logging on to the HDS application

If you are not already logged into the NHS Supply Chain applications, the logon box is shown when you try to access the HDS application.

To log in:

1. Type your username and password into the boxes.
2. Click [Login](#).

The screenshot shows the 'Home delivery' login page for the NHS Supply Chain. At the top, there is a blue header with 'Home delivery' in white, 'NHS Supply Chain' in white, and the NHS logo. Below the header, there are two input fields: 'Please enter your username' with the text 'PECKAS' and 'Please enter your password' with masked characters. A 'Login' button is positioned below the password field. To the right of the password field is a link that says 'Forgotten your password?'. Below the login fields, there is a paragraph of text stating that the application requires either Microsoft Internet Explorer 6.0 or above, Mozilla Firefox or Mozilla 5.x or above, and that any other configuration is not supported. Below this is another paragraph of text stating that unauthorised access to data on this system will constitute a breach of the computer misuse act 1990 and that users must not exceed the legitimate bounds of their authorised access and under no circumstances disclose their password to a third party. At the bottom, there is a small text string: 'Single Sign On v1.1.21.0/v1.1.309.0 184/uk Development'.

3. If you are using the system for the first time, if your password has expired or you forgot your password and are using a replacement sent to you by email, you are asked to provide a new password.
4. If you are using the system for the first time, you are asked to confirm your personal details. Make any necessary correction.

The screenshot shows the 'Validate your details' page for the NHS Supply Chain. At the top, there is a blue header with 'Home delivery' in white, 'NHS Supply Chain' in white, and the NHS logo. Below the header, there is a section titled 'Validate your details'. Below this title, there is a paragraph of text stating that the system needs to confirm that the user's contact details are correct and up to date, and that the user should confirm their details below. Below this text are five input fields: 'Email address' with the text 'as.peck@mymail.org', 'Telephone number' with the text '0115 123123', 'First name' with the text 'Anne Susan', and 'Last name' with the text 'Peck'. Below the input fields is a 'Save changes' button. At the bottom, there is a small text string: 'Single Sign On v1.1.21.0/v1.1.309.0 184/uk Development'.

Click **Save changes** to confirm the information.

5. Read the following message about the Home Delivery Service confidentiality policy and then click ACCEPT if you agree to comply with the requirements.

**Home delivery** NHS Supply Chain **NHS**

Home delivery service

Information relating to patients and their medical treatment is highly sensitive and must be treated by all HDS online users in strict confidence.

Once downloaded from HDS online it is the responsibility of the user concerned to ensure that all such information is kept securely and is not used for unauthorised or unlawful purposes. This should include ensuring that all sensitive electronic data is securely encrypted and that any personal data involved is only processed in compliance with Data Protection laws.

By clicking 'Accept' below I acknowledge and agree to personally comply with these obligations.

### Forgotten your password?

Click the [Forgotten your password?](#) link on the logon box. An email will be sent to the email address associated with your account with a new temporary password, which you must change before you can use the system.

### Understanding the Home Delivery Service home page

If you are only associated with one organisation, its name is displayed automatically in [Trust selection](#) and the information on the home page relates to that organisation.

If you are associated with more than one organisation, changing the organisation (in [Trust selection](#)) updates the page to show information appropriate to the selected organisation.

**Home delivery** NHS Supply Chain NHS

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

**Welcome**  
Welcome  
You are now accessing the Home delivery service from NHS Supply Chain

**Trust selection**  
ZE/TST CHARITIES & HOSPICES

**Currently assigned roles**  
 Authorise and send orders  
 HDS administrator  
 Financial limit of £0  
 Connect  
 HDS assessor

**Distributor information**  
 Name: DHL Supply Chain  
 Address: Longcroft Road, Corby, Corby, NN18 8EY  
 Telephone: 01924 328501  
 Fax:  
 Email: home.delivery@supplychain.nhs.uk

**System alerts and messages**  
 There are 4 patients who will need reviewing this month  
 25/02/2013 -  
**Bank Holiday Orders**  
 Dear Customer  
 Deliveries due to be made on 28th, 28th & 30th May 2013 should have their call-backs activated by the dates shown below:  

Delivery Day	Call-back activated by (close of business)
Tuesday 28th May	Wednesday 22nd May
Wednesday 28th May	Thursday 23rd May
Thursday 30th May	Friday 24th May
Friday 31st May	Tuesday 28th May (as normal)

 Any delivery not activated by the dates above will be delivered on the next available day following the postcode routing. This is to allow the normal 3 day lead time for delivery to be made.

**Care home search**  
**Patient search**

HDS Version v2.6.546.0 (184/uk) © NHS Supply Chain 2005 - 2013 (Narrow, Wide) 14/08/2013

The page is divided into sections:

- **Currently assigned roles** (labelled **A** on the image) lists the roles (access rights) you have regarding the NHS Supply Chain application.
- **Distributor information** (labelled **B** on the image) contains contact details for the distributor associated with your organisation.
- **System alerts and messages** (labelled **C** on the image) are important notifications - often patient-related – relevant to your use of the HDS application.
  - A prescription is 'held' if the deadline for a call-back is missed for a call-back prescription or a delivery failed. Click the link in the alert message to go to the list of prescriptions and filter them to show held prescriptions. See 'Viewing prescriptions' on page 44.
  - Patients must be reviewed at regular intervals (the frequency is set by the trust). When a review is due, the patient is included in the list of patients for review.
  - If a patient has died, an alert notice is posted.
  - Notices from NHS Supply Chain are also displayed in this section. The example above is listing Bank Holiday dates which affect deliveries.
- **Care home search** (labelled **D** on the image) - see 'Searching for a care home' on page 20 – and **Patient search** (labelled **E** on the image) – see 'Searching for patients'

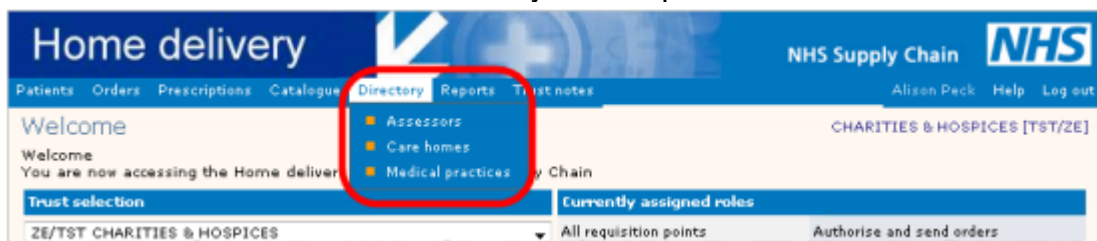
on page 28 – enable you to find a care home or a patient to work with quickly and easily.

These searches are across *all* the trusts you can access. The searches on the Care home and Patient pages are *within* the trust you selected on the home page.

## Assessors, care homes and medical practices

The HDS application stores information about assessors, care homes and medical practices. These can then be selected and associated with individual patient records without needing to enter details about them.

Links to the pages where information about assessors, care homes and medical practices is stored are available from the Directory menu option.



## Viewing and managing assessors

Anyone with access to the HDS application can view assessor information. You must have the HDS Administrator role or the HDS Assessor role to create or modify assessor details.

### Viewing assessor details

If you can only view assessor details, you can:

- View summary details for assessors in a list, including how many patients have been assigned to that assessor.
- Click an assessor's name to view full details for that assessor.
- Click the assessor's email address to create a new message in your email application addressed to this assessor.
- Click **View patients** when viewing details for an assessor to see details of the patients linked to that assessor.

To view assessor details:

1. Click **Directory** on the blue menu.
2. Select **Assessors** from the list shown. The **Assessors** page opens.

Name	Address	Post code	Role	Email address	Contact no	Patients
Jane Adams	1 High Street Anytown Northshire	AA1 1AA	Continence Advisor	jane.adams@myemail.com	0115 123456	4
Angela Brown	1 Main Street Anytown Northshire	AA1 1AB	Clinical Nurse Specialist	angela.brown@mymail.org	0115 123321	0

3. Use the filter options at the top of the page to cut the list down to a manageable size.
4. Type any part of the assessor's **Name**, **Address**, **Postcode** or **Role** into the boxes at the top of the page.  
You must type the letters in sequence. For example, if an assessors address is '1 Main Street', you can type Main, ain S or 1 Mai and it will be included in the list. You cannot type Main St. (with a full stop).
5. Click **Filter** to show only those records that match.  
Click **Clear** to show all records.

### Creating an assessor record

Assessor address, email address and contact telephone number can all be recorded.

To create an assessor record:

1. View the list of assessors (see 'Viewing assessor details' on page 15).
2. Click **Create**.

3. Complete information about this assessor.
  - You must include the person's **First name** and **Last name**.
  - Be consistent with the roles you allocate to people if you want to use them for filtering records.

Home delivery NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

New assessor CHARITIES & HOSPICES [TST/ZE]

Assessor information			
First name	Amanda	Last name	Smith
Address	1 High Street	Email address	
	Anytown	Contact no	0115 123456
	Northshire	Role	Continence Advisor
Post code	AA1 1AA		

Save Back

- Click **Save**.

A message is displayed if the assessor has been created successfully. Either click the link in the message to go back to the list of assessors or select another option from the menu.

### Changing assessor details

All details recorded about an assessor can be changed.

To change assessor details:

- View the list of assessors (see 'Viewing assessor details' on page 15).
- Click the name of the assessor you want to change.

The **View assessor** page opens.

Home delivery NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

View assessor CHARITIES & HOSPICES [TST/ZE]

Assessor information			
First name	Jane	Last name	Adams
Address	1 High Street	Email address	jane.adams@myemail.com
	Anytown	Contact no	0115 123456
	Northshire	Role	Continence Advisor
Post code	AA1 1AA		

Edit Transfer patients View patients Delete Back

- Click **Edit**.
- Make the changes and click **Save**.

### Viewing patients assigned to an assessor

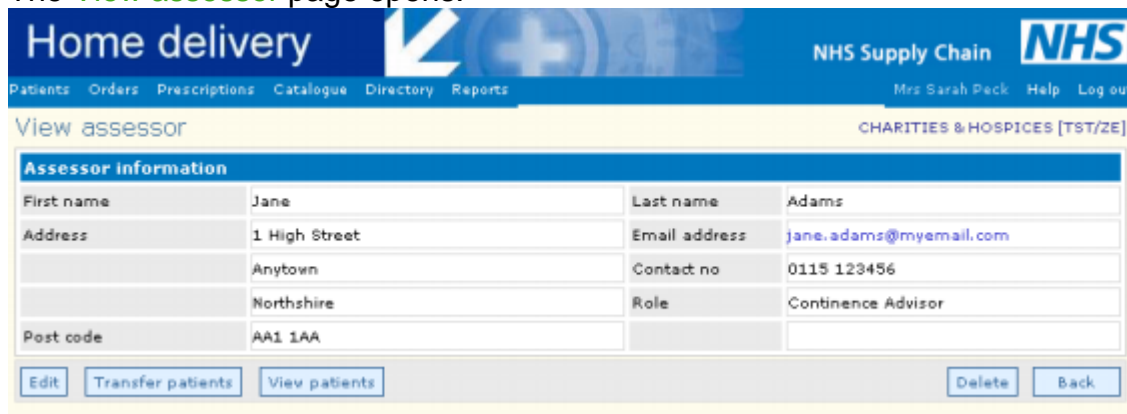
Details of patients assigned to an assessor can be viewed.





To view patients assigned to an assessor:

1. View the list of assessors (see 'Viewing assessor details' on page 15) and click the name of the assessor whose patients you want to see.

The [View assessor](#) page opens.






**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

**View assessor** CHARITIES & HOSPICES [TST/ZE]

Assessor information			
First name	Jane	Last name	Adams
Address	1 High Street	Email address	jane.adams@myemail.com
	Anytown	Contact no	0115 123456
	Northshire	Role	Continence Advisor
Post code	AA1 1AA		

Edit Transfer patients View patients Delete Back

2. Click [View patients](#).
3. The list of patients assigned to this assessor is shown below the assessor details.
4. From here you can:
  - Click the patient's name to open the patient's record (see 'Viewing a patient's record' on page 30).
  - See care home details (for patients living in one) by clicking the Care Home icon  to open the [View care home](#) page (see 'Viewing care home details' on page 20).
  - Go to the [Prescriptions](#) page to create a prescription for the patient by clicking on the [New prescription](#) icon  (see 'Creating a prescription' on page 45).
  - Go to the [Create emergency or ad hoc order](#) page (see 'Creating an emergency or ad hoc order' on page 58) by clicking the [Emergency](#) icon .

## Transfer patients from one assessor to another

All the patients currently assigned to one assessor can be transferred to another. This is useful when there are staff changes.

Assessors for individual patients are changed within the patients' records.

To transfer patients from one assessor to another:

1. View the list of assessors (see 'Viewing assessor details' on page 15) and click the name of the assessor whose patients you want to see.

The [View assessor](#) page opens.



**Home delivery** **NHS Supply Chain** **NHS**

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

View assessor CHARITIES & HOSPICES [TST/ZE]

**Assessor information**

First name	Jane	Last name	Adams
Address	1 High Street	Email address	jane.adams@myemail.com
	Anytown	Contact no	0115 123456
	Northshire	Role	Continence Advisor
Post code	AA1 1AA		

Edit Transfer patients View patients Delete Back

- Click **Transfer patients**.
- Select the new assessor from the dropdown list.

**Home delivery** **NHS Supply Chain** **NHS**

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

View assessor CHARITIES & HOSPICES [TST/ZE]

Confirmation required

Are you sure you wish to transfer all patients from 'Jane Adams'?

Move 4 patients to assessor:

View patients Transfer Cancel Back

- Click **Transfer**.  
All the patients are now on the list of the other assessor.

### Deleting an assessor

To delete assessor details:

- View the list of assessors (see 'Viewing assessor details' on page 15).
- Click the name of the assessor you want to delete.  
The **View assessor** page opens. Check that this is the correct assessor.
- Click **Delete**.  
If any patients are currently assigned to this assessor, you are prompted to transfer them.

**Home delivery** **NHS Supply Chain** **NHS**

Patients Orders Prescriptions Catalogue Directory Reports Mrs Sarah Peck Help Log out

View assessor CHARITIES & HOSPICES [TST/ZE]

Confirmation required

Are you sure you wish to delete Assessor 'Jane Adams'?

Move 4 patients to assessor:

View patients Delete Cancel Back

- Click **View patients** to see details of these patients (see 'Viewing patients assigned to an assessor' on page 17).
  - Select the new assessor from the dropdown list to transfer these patients.
- Click **Delete**.

The assessor's record is deleted and any patients that were associated with the assessor are transferred to the new assessor.

## Viewing care home details

You can only see basic care home details if you have the HDS Enquirer role.

When a trust first starts using the HDS application, care homes details are imported using existing data. If you need other care homes creating, please contact Customer Services (within your trust if your trust is providing its own customer services, or at NHS Supply Chain).

## Viewing a list of care homes

To view care home details within the trust you selected from the home page:

1. Click **Directory** on the blue menu.
2. Select **Care homes** from the list shown. The Care homes page opens.

Home delivery NHS Supply Chain NHS

Patients Orders Prescriptions Catalogue Directory Reports Mrs Anne Susan Peck Help Log out

Care homes CHARITIES & HOSPICES [TST/ZE]

Care home Post code Next delivery date between

Care home Address Post code Pres. type Delivery day Frequency Next del. date

Sleepy Hollow	48 Elm Avenue	NG10 5EJ	Automatic	Friday	1 Week	23/08/2013
Windy Corner	3 Horsecroft Road	IP33 2DS	Caliback	Monday	2 Week	19/08/2013

Records 1-2 of 2

3. To reduce the number of care homes shown in the list, use the filter options at the top of the page:
  - Type all or part of the **Care home** name in the first box. For example, 'Hollow' will include 'Sleepy Hollow' and 'The Hollows'.
  - Type all or part of a **Postcode** in the second box to filter by post code. For example, NG10 will include all care homes in that postal area.
  - Use the calendars to enter the earliest and latest next delivery date. For example, 19/08/2016 and 24/08/2016 will include all homes where the next delivery is within that date range.

Click **Filter** to filter the records and **Clear** to display all care homes.

## Searching for a care home

You can search for a care home across all the trusts you can access from the home page of the HDS application.

To search for a care home:

1. Click the  icon to the right of the **Care home search** section at the bottom of the HDS home page.

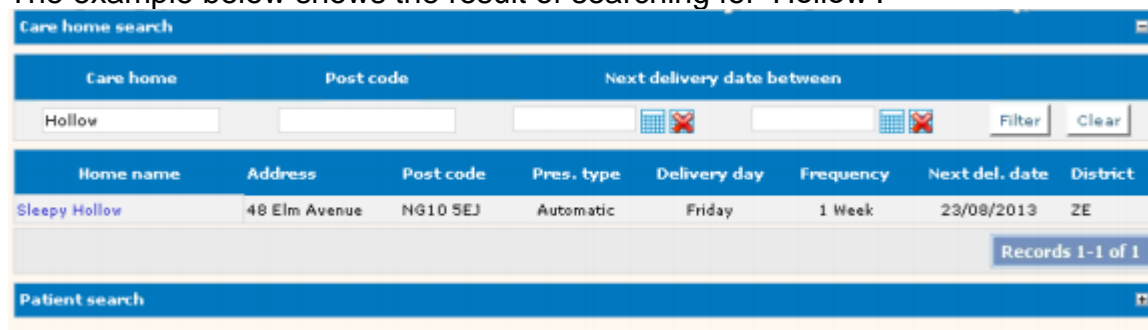
The section expands to show the search options.



2. To find a care home, use the search options at the top of the section:
  - Type all or part of the Care home name in the first box. For example, 'Hollow' will find 'Sleepy Hollow' and 'The Hollows'.
  - Type all or part of a Post code in the second box to search by post code. For example, NG10 will find all care homes in that postal area.
  - Use the calendars to enter the earliest and latest next delivery date. For example, 19/08/2016 and 24/08/2016 will find all homes where the next delivery is within that date range.

Click **Filter** to find matching records. **Clear** empties the search boxes.

The example below shows the result of searching for 'Hollow'.



Home name	Address	Post code	Pres. type	Delivery day	Frequency	Next del. date	District
Sleepy Hollow	48 Elm Avenue	NG10 5EJ	Automatic	Friday	1 Week	23/08/2013	ZE

Records 1-1 of 1

## Viewing details of a care home

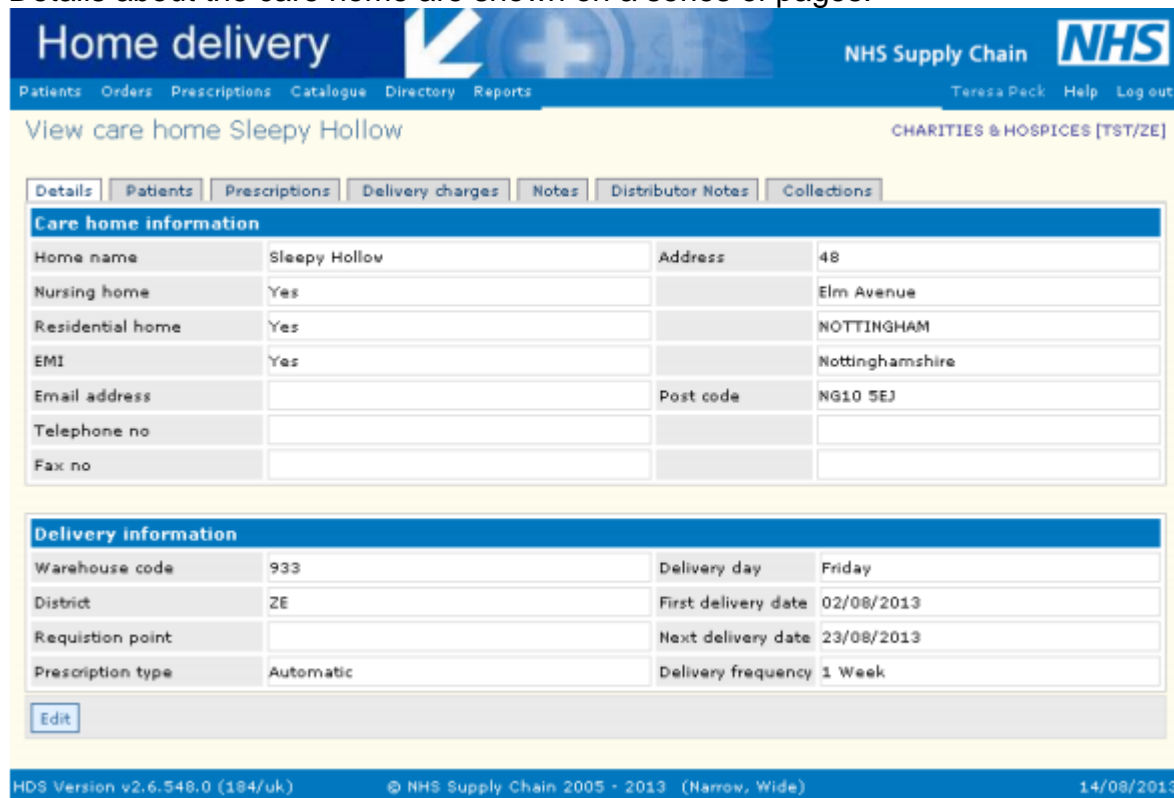
You must have *HDS Assessor* or *HDS Admin* roles to view details of care homes.

You can view information about a care home and about the patients who live there.

To view detailed information about a care home:

1. Find the care home you want to view by either:
  - Viewing a list of care homes (see page 20)
  - Searching for a care home (see page 20)
2. Click the name of the care home.

Details about the care home are shown on a series of pages.



**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Teresa Peck Help Log out

View care home Sleepy Hollow CHARITIES & HOSPICES [TST/ZE]

Details Patients Prescriptions Delivery charges Notes Distributor Notes Collections

**Care home information**



Home name	Sleepy Hollow	Address	48
Nursing home	Yes		Elm Avenue
Residential home	Yes		NOTTINGHAM
EMI	Yes		Nottinghamshire
Email address		Post code	NG10 5EJ
Telephone no			
Fax no			

**Delivery information**

Warehouse code	933	Delivery day	Friday
District	ZE	First delivery date	02/08/2013
Requisition point		Next delivery date	23/08/2013
Prescription type	Automatic	Delivery frequency	1 Week

Edit

HDS Version v2.6.548.0 (184/uk) © NHS Supply Chain 2005 - 2013 (Narrow, Wide) 14/08/2013

3. Click a tab to view information on that page.
  - The **Details** page contains the basic information that was entered when the record for the home was created.
  - The **Patients** page is a list of patients who are resident at that care home who have been registered on the HDS system.
  - Click a patient's name to go to that patient's record. Icons at the right of each row enable you to create a prescription for that patient (  ) and create an emergency or ad hoc order for that patient (  ).
  - The **Prescriptions** page is a list of prescriptions for patients who are resident at that care home. You can filter the list of prescriptions by **Patient status** (**All patients**, **Active only**, **Suspended**, **Discharged** or **Deceased**).
  - The **Delivery charges** page displays delivery charges as orders. To see details, click the order reference (in the **Ref** column).
  - The **Notes** page displays any notes about the care home added when the record was created.
  - The **Distributor Notes** page contains any notes recorded by the distributor about this care home.
  - The **Collections** page itemises any collections from this care home.

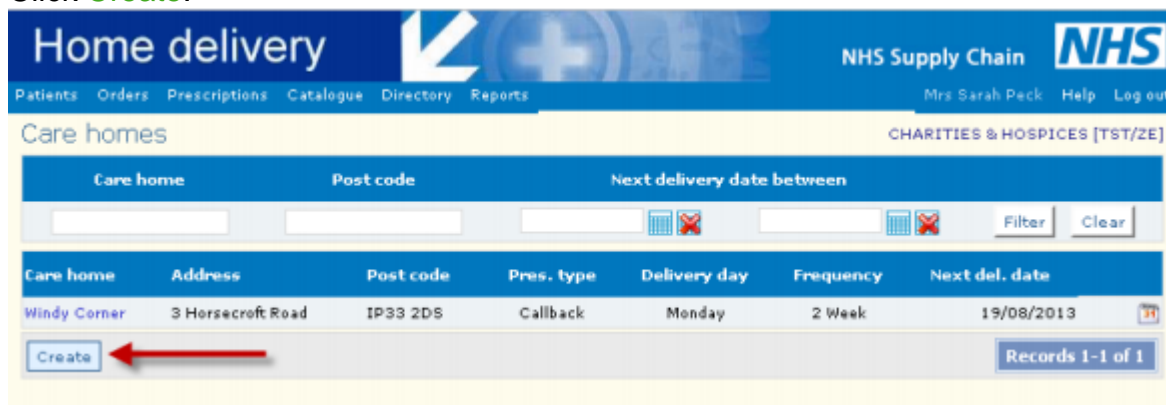
## Creating Care Home records

You must have the *HDS Customer Services* role to create Care Homes. If your trust does not have staff with this role, contact Customer Services at NHS Supply Chain.

New care homes can be created at any time.

To create a new care home record:

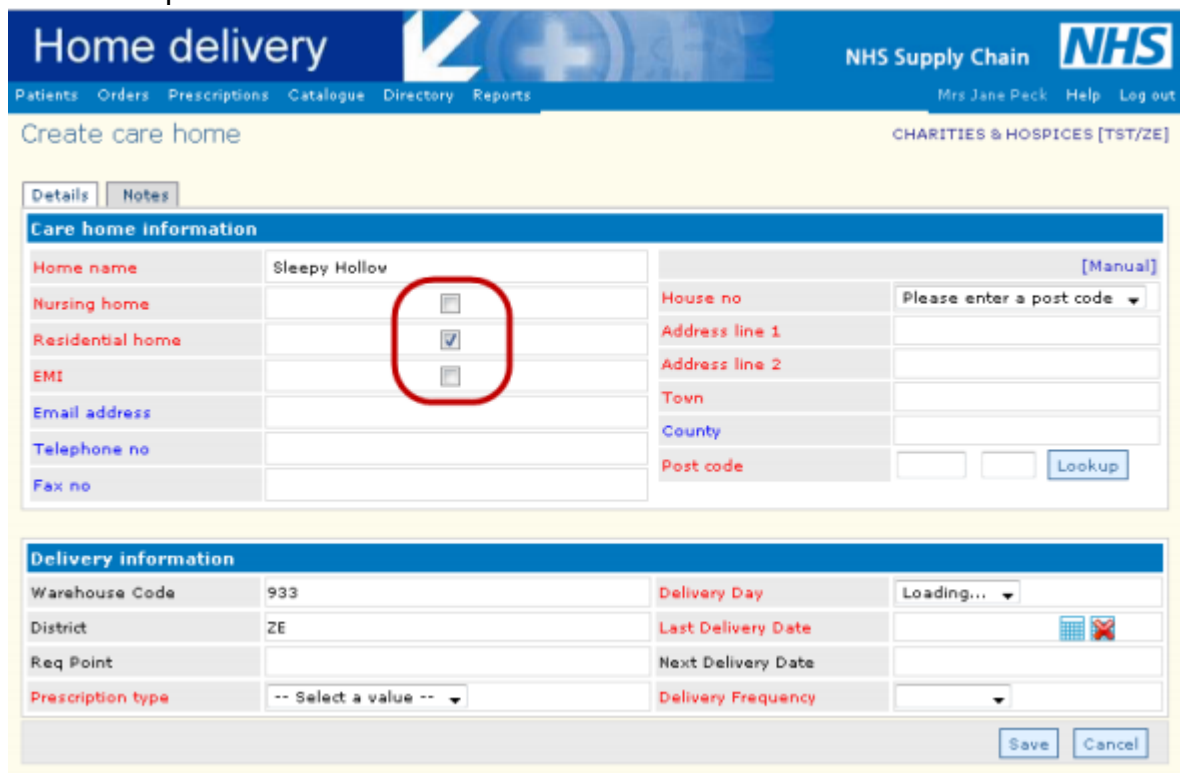
1. View the list of care homes (see 'Viewing a list of care homes' on page 20).
2. Click **Create**.



The screenshot shows the 'Home delivery' interface with a navigation bar (Patients, Orders, Prescriptions, Catalogue, Directory, Reports) and user information (Mrs Sarah Peck, Help, Log out). Below the navigation bar is a 'Care homes' section with a table. The table has columns: Care home, Address, Post code, Pres. type, Delivery day, Frequency, and Next del. date. One record is visible: 'Windy Corner', '3 Horsecroft Road', 'IP33 2DS', 'Callback', 'Monday', '2 Week', '19/08/2013'. At the bottom left of the table is a 'Create' button, which is highlighted with a red arrow. At the bottom right is a 'Records 1-1 of 1' button.

The **Create care home** page opens.

3. Enter the name of the care home.
4. Select all that apply of **Nursing home**, **Residential home** and **EMI**. You must select at least one option.



The screenshot shows the 'Create care home' page with a navigation bar (Patients, Orders, Prescriptions, Catalogue, Directory, Reports) and user information (Mrs Jane Peck, Help, Log out). Below the navigation bar is a 'Create care home' section with a table. The table has columns: Home name, Address, Post code, Pres. type, Delivery day, Frequency, and Next del. date. The 'Home name' field is filled with 'Sleepy Hollow'. The 'Address' field is empty. The 'Post code' field is empty. The 'Pres. type' field has a dropdown menu with 'Please enter a post code'. The 'Delivery day' field is empty. The 'Frequency' field is empty. The 'Next del. date' field is empty. A red circle highlights the checkboxes for 'Nursing home', 'Residential home', and 'EMI'. The 'Residential home' checkbox is checked. Below the table is a 'Delivery information' section with fields for Warehouse Code, District, Req Point, Prescription type, Delivery Day, Last Delivery Date, Next Delivery Date, and Delivery Frequency. The 'Warehouse Code' is '933', 'District' is 'ZE', 'Req Point' is empty, 'Prescription type' is '-- Select a value --', 'Delivery Day' is 'Loading...', 'Last Delivery Date' is empty, 'Next Delivery Date' is empty, and 'Delivery Frequency' is empty. At the bottom right are 'Save' and 'Cancel' buttons.

5. Enter the address of the care home either using the post code lookup or manually.

To find the address using the post code lookup:

- Type the postcode into the boxes at the bottom of the address block (see image overleaf).
- Click **Lookup**.

Create care home CHARITIES & HOSPICES [TST/ZE]

Details Notes

**Care home information**

Home name	Sleepy Hollow	House no	[Manual]
Nursing home	<input type="checkbox"/>	Address line 1	Please enter a post code
Residential home	<input checked="" type="checkbox"/>	Address line 2	
EMI	<input type="checkbox"/>	Town	
Email address		County	
Telephone no		Post code	NG10 5EJ <b>Lookup</b>
Fax no			

The address is automatically completed.

- Select the appropriate **House no** from the dropdown list.

Create care home CHARITIES & HOSPICES [TST/ZE]

Details Notes

**Care home information**

Home name	Sleepy Hollow	House no	[Manual]
Nursing home	<input type="checkbox"/>	Address line 1	48
Residential home	<input checked="" type="checkbox"/>	Address line 2	Elm Avenue
EMI	<input type="checkbox"/>	Town	Sandiacre
Email address		County	NOTTINGHAM
Telephone no		Post code	Nottinghamshire
Fax no			NG10 5EJ <b>Lookup</b>

To type the address manually, click **[Manual]** above the address block and type the address details into the boxes. This should only be used when it is not possible to find the address from its post code.

The option above the address block switches to **[Automatic]** when you are in manual mode.

- Record **Email address**, **Telephone no** and **Fax no** if these are available.
- In the **Delivery information** section, select the **Prescription type** from the list:
  - Automatic** means prescribed items are automatically sent following the schedule
  - Callback** means that the prescribed items are available but are only sent if the patient calls to request stock.

**Delivery information**

Warehouse Code	933	Delivery Day	Friday
District	ZE	Last Delivery Date	16/08/2013
Req Point		Next Delivery Date	
Prescription type	Automatic	Delivery Frequency	1 Week

Save Cancel

- Select a **Delivery Day** from the dropdown list.

The list does not contain any information until the post code of the nursing home has been recorded. Once the post code of the address is known, the days when the distributor is delivering in that area are shown.

9. Select the **Delivery Frequency** from the dropdown list.  
The options available in **Delivery Day** and **Last Delivery Date** are managed by the distributor, who will have allocated delivery days by location. An alert is displayed on the distributor's home page for Care Homes that do not have a delivery day.
10. Click **Save**.
11. If you want to make any notes about the care home, click the Notes tab. Type your note and click **Save**.

A message is displayed to show that the care home has been successfully created. The new care home is now shown in the list.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery Helen Peck Help Log out

**Care homes** CHARITIES & HOSPICES [TST/ZE]

Care home	Address	Post code	Pres. type	Delivery day	Frequency	Next del. date
Sleepy Hollow	48 Elm Avenue	NG10 5EJ	Automatic	Friday	1 Week	23/08/2013
Windy Corner	3 Horsecroft Road	IP33 2DS	Callback	Monday	2 Week	19/08/2013

Create Records 1-2 of 2

## Deleting care home records

You must have the *HDS Customer Services* role to delete Care Homes. If your trust does not have staff with this role, contact Customer Services at NHS Supply Chain.

Care homes cannot be deleted while there are outstanding deliveries or collections or while any patients are associated with them.

To delete a Care Home:

1. Click **Directory** on the blue menu.
2. Select **Care homes** from the list shown. The **Care homes** page opens.
3. Use the filter options at the top of the page to reduce the number of Care homes displayed.
4. Click the name of the Care Home you want to delete.
5. Click **Delete**.



Home delivery

NHS Supply Chain

NHS

Patients Orders Prescriptions Catalogue Directory Reports Delivery

Helen Peck Help Log out

View care home Grove House

SUE RYDER CARE HOMES [TST/YC]

Details Patients Prescriptions Delivery charges Notes Distributor Notes Collections

Care home information

Home name	Grove House	Address	(CORNWALLIS COUNTRY HOTEL & RESTAURANT)
Nursing home	Yes		Rectory Road
Residential home	No		EYE
EMI	No		Suffolk
Email address		Post code	IP23 8AJ
Telephone no	013320540000		
Fax no			

Delivery information

Warehouse code	933	Delivery day	Thursday
District	YC	First delivery date	04/10/2012
Requisition point	YC001D	Next delivery date	09/01/2014
Prescription type	Callback	Delivery frequency	2 Week

Edit

Delete

A message is displayed either stating that the care home has been deleted or giving a reason why it could not be.

## Medical practices



Details of medical practices cannot be updated by users of the HDS application. This information is imported automatically using a national list of GP practices.

### Viewing medical practices

To view details of medical practices:

1. Click **Directory** on the blue menu.
2. Select **Medical practices** from the list shown. The **Medical practice** search page opens.



**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Elaine Sayer Help Log out

Medical practice search SUE RYDER CARE HOMES [TST/YC]

Organisation name
  Post code
  Primary care trust

Organisation name	Code	PCT	Address	Post code	Telephone no
ALDERTON SURGERY	D83054	Suffolk PCT	ALDERTON HEALTH CENTRE	IP12 3DA	01394411641
ANGEL HILL SURGERY	D83005	Suffolk PCT	1 ANGEL HILL	IP33 1LU	01284 753008
AVICENNA	D83070	Suffolk PCT	AVICENNA	IP22 2QX	01953681303
BARRACK LANE MEDICAL PRACTICE	D83059	Suffolk PCT	BARRACK LANE MEDICAL CTR.	IP1 3NQ	01473 252827
BARROW HILL SURGERY	D83611	Suffolk PCT	BARROW HILL SURGERY	IP29 5DX	01284 810330
BILDESTON HEALTH CENTRE	D83006	Suffolk PCT	THE HEALTH CENTRE	IP7 7EX	01449 740254
BOTESDALE HEALTH CENTRE	D83033	Suffolk PCT	THE HEALTH CENTRE	IP22 1DW	01379 898295
BURLINGTON ROAD SURGERY	D83008	Suffolk PCT	BURLINGTON ROAD SURGERY	IP1 2EU	01473 211661
BUTCHERS LANE SURGERY	D83616	Suffolk PCT	BUTCHERS LANE SURGERY	CO10 5DZ	01787211821
CENTRAL SURGERY	D83048	Suffolk PCT	CENTRAL SURGERY	IP11 7DT	01394 283197
CHILD DEVELOPMENT CENTRE	Y00697	Suffolk PCT	HOSPITAL ROAD	IP33 3NT	01284 775005
CHRISTMAS MALTINGS SURGERY	D83021	Suffolk PCT	CHRISTMAS MALTINGS SURG.	CB9 8HF	01440702010
CHURCH FARM SURGERY	D83036	Suffolk PCT	CHURCH FARM	IP15 5EB	01728452027
CLARE GUILDHALL SURGERY	D83076	Suffolk PCT	THE GUILDHALL SURGERY	CO10 8NY	01787 277523
CLEMENTS AND CHRISTMAS MALTINGS SURGERY	D83012	Suffolk PCT	CHRISTMAS MALTINGS SURG.	CB9 8HF	01440 703493


Records 1-15 of 85 Page 1 of 6 [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) >

3. The list of practices is very long, so use the filter options at the top of the page to reduce the list:

- Type all or part of the **Organisation name** or **Postcode** to see only those practices that have matching details.
- Select the **Primary care trust** to limit the results to those practices belonging to the selected trust.

Click **Filter** to filter the list. Click **Clear** to see all practices.

4. Click the name of a practice to see its details.

**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Elaine Sayer Help Log out

View Medical practice SUE RYDER CARE HOMES [TST/YC]

**Medical practice information**

Lead Name	ABBEY WOMENS CLINIC	Organisation Code	K81671
Address	9 ELDON SQUARE	PCT	
	READING		
	BERKSHIRE		
Post Code	RG1 4DP		
Telephone No	0118 9352322		

### Viewing patients of a practice

You can view all patients belonging to a particular practice and from the list displayed can

identify those overdue for reviews, and create prescriptions and emergency or ad hoc orders.

To view patients of a practice:

1. Access the practice record (see 'Viewing medical practices' on page 26).
2. Click [View Patients](#).

The patients belonging to this practice are listed.

**Home delivery** **NHS Supply Chain**

Patients Orders Prescriptions Catalogue Directory Reports Elaine Sayer Help Log out

**View Medical practice** SUE RYDER CARE HOMES [TST/YC]

**Medical practice information**

Lead Name	ABBEY WOMENS CLINIC	Organization Code	K81671
Address	9 ELDON SQUARE	PCT	
	READING		
	BERKSHIRE		
Post Code	RG1 4DP		
Telephone No	0118 9352322		

Hide Patients Transfer patients Back

Patient name	Date of birth	NHS number	Address	Post code	Contact no	Next delivery
Falvey Brooke	22/08/1979		16 Ashover Road ALFRETON	DE55 6FF		11/02/2010

Records 1-1 of 1

See 'Understanding and using the list of patients' on page 29 for an explanation of the icons and the actions you can take from this list of patients.

If the patient's GP practice is not known when a patient record is created, an 'unknown GP practice' is assigned. Identifying all of the patients assigned to that unknown GP practice is a useful data validation tool, and each patient's record can be accessed to set the correct practice when it is known.

## Viewing, creating and amending patient records

Patient records can be accessed from many places within the application. Anywhere you see a patient's name forming a link, you can click it to open that patient's record.

## Finding patients already registered on the HDS system

You can find patients already registered on the system who are:

- Registered with a practice (see ‘Viewing patients of a practice’ on page 27)
- Assigned to an assessor (see ‘Viewing patients assigned to an assessor’ on page 17)
- Living at a particular care home (see ‘Viewing details of a care home’ on page 21).
- Patients whose records you have recently accessed:
  - a) Select **Patients** and then **Recent patients** from the menu. A list of recently accessed patients is shown.
  - b) Select the patient whose record you want to open.



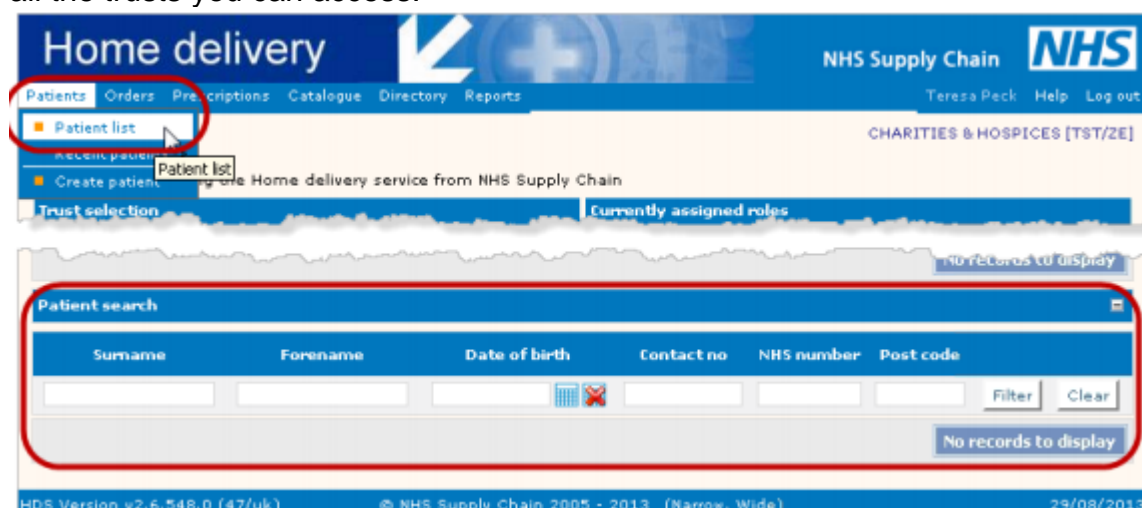
You can also search for patients if you know some of their personal details (name, date of birth, contact number, NHS number and postcode can all be used to find a patient).

## Searching for patients

1. Begin your search from:

The **Patients** menu – select **Patient list** to see a list of all patients registered in the trust you are currently associated with.

The **Patient search** option at the bottom of the home page to search for patients across all the trusts you can access.



If the filter options are not visible on the Home page, click the icon on the Patient search bar.

2. Type the criteria for your search into the boxes using the table below as a guide.

Using these search options...	Finds...
Surname, Forename, NHS Number and Postcode	Patients whose names, NHS number or Postcode contain the text entered.

Type all or part of the patient's surname, forename or post code	For example, typing Gre, ree or een in the <b>Surname</b> box finds a patient whose surname is 'Green'. Gre also finds 'Gresham', ree also finds 'Gumtree' and een also finds 'Greengage'
<b>Date of birth</b> Use the calendar control or type a date of birth as dd/mm/yyyy.	Patients whose dates of birth exactly match the date entered.
Contact number	Patients whose contact number exactly matches that entered – no additional or missing spaces, hyphens or other characters
<b>Status</b> of either <b>Act</b> (active) or <b>Sus</b> (suspended) <i>Only available on full list of trust's patients</i>	Patients who are currently active or whose deliveries have been suspended (for example, they may have been admitted to hospital).





3. Click **Filter** to display a list of patients who meet all the criteria you specified.

Click **Clear** to clear the boxes and return the list to its default state:

- The default state is empty for the search on the **Home** page
- The default state is a complete list of patients in the trust if you started from the **All patients** option).

## Understanding and using the list of patients

From this list of patients, you can:

- See which patients are overdue for a review by looking for the  icon to the left of the patient's name.
- Click the patient's name to open the patient's record (see 'Viewing a patient's record' on page 30).
- See care home details (for patients living in one) by clicking the **Care Home** icon  to open the **View care home** page (see 'Viewing details of a care home' on page 21).
- Go to the **Prescriptions** page to create a prescription for the patient by clicking on the **New prescription** icon  (see 'Creating a prescription' on page 45).
- Go to the **Create emergency or ad hoc order** page (see 'Creating an emergency or ad hoc order' on page 58) by clicking the **Emergency** icon .

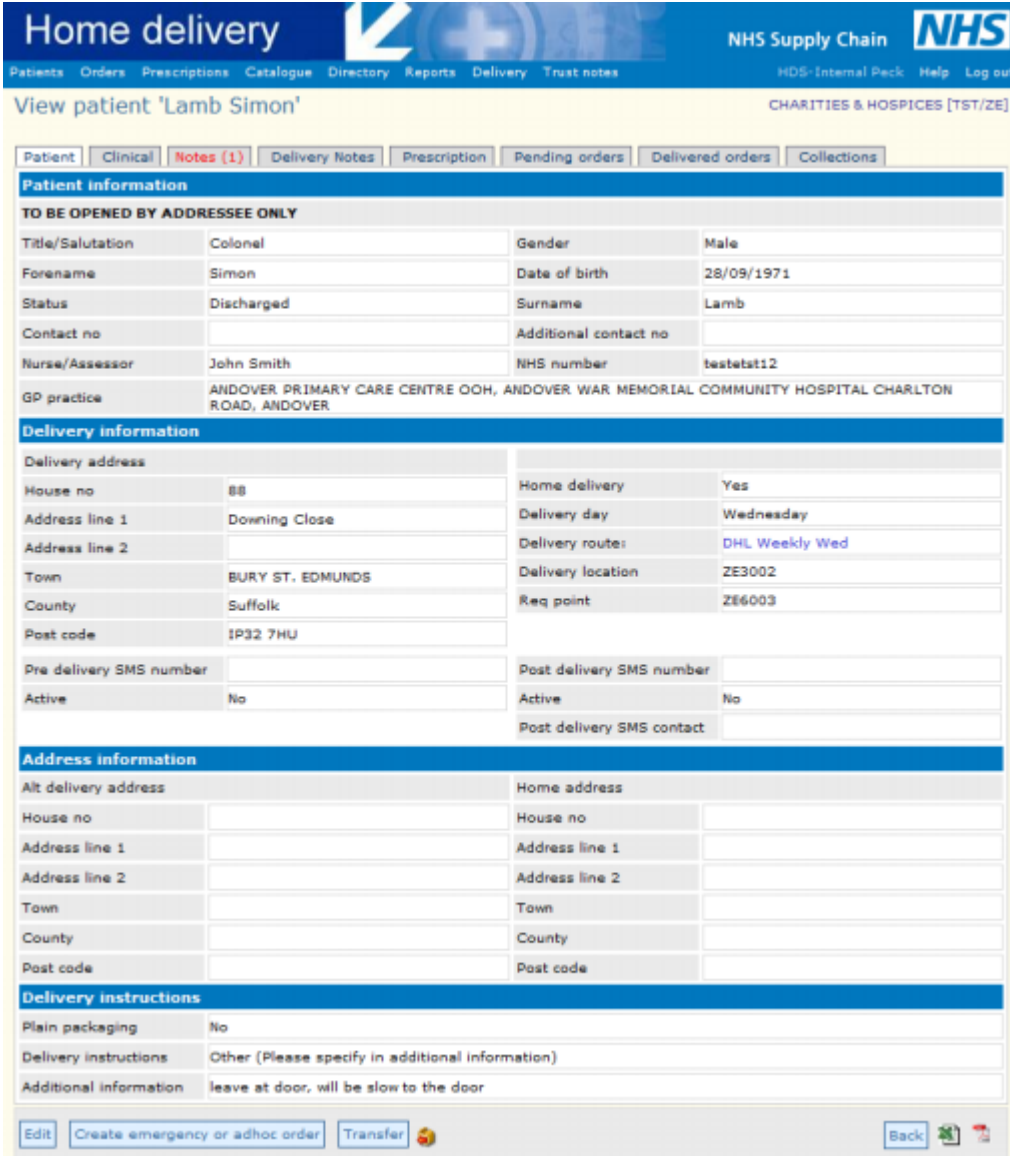
## Viewing a patient's record

View a patient's record by either:

- Clicking a patient's name anywhere it is displayed as a link.
- Selecting the patient from the list of **Recent patients** (available from the **Patients** menu).

A patient's record consists of a number of pages, shown below. You may not be able to see

all of the pages, or have access to the options at the bottom of the page as these depend on your role and access levels.



The screenshot shows the 'Home delivery' interface for patient 'Lamb Simon'. The page has a blue header with the NHS logo and navigation links. Below the header, there's a tabbed interface with 'Patient', 'Clinical', 'Notes (1)', 'Delivery Notes', 'Prescription', 'Pending orders', 'Delivered orders', and 'Collections'. The 'Patient' tab is active, showing patient information, delivery information, address information, and delivery instructions.

**Patient information**

TO BE OPENED BY ADDRESSEE ONLY

Title/Salutation	Colonel	Gender	Male
Forename	Simon	Date of birth	28/09/1971
Status	Discharged	Surname	Lamb
Contact no		Additional contact no	
Nurse/Assessor	John Smith	NHS number	testatst12
GP practice	ANDOVER PRIMARY CARE CENTRE OOH, ANDOVER WAR MEMORIAL COMMUNITY HOSPITAL CHARLTON ROAD, ANDOVER		

**Delivery information**

Delivery address		Home delivery	Yes
House no	88	Delivery day	Wednesday
Address line 1	Downing Close	Delivery route	DHL Weekly Wed
Address line 2		Delivery location	ZE3002
Town	BURY ST. EDMUNDS	Req point	ZE6003
County	Suffolk		
Post code	IP32 7HU		
Pre delivery SMS number		Post delivery SMS number	
Active	No	Active	No
		Post delivery SMS contact	

**Address information**



Alt delivery address		Home address	
House no		House no	
Address line 1		Address line 1	
Address line 2		Address line 2	
Town		Town	
County		County	
Post code		Post code	

**Delivery instructions**



Plain packaging	No
Delivery instructions	Other (Please specify in additional information)
Additional information	leave at door, will be slow to the door

At the bottom, there are buttons for 'Edit', 'Create emergency or adhoc order', 'Transfer', and 'Back'.

- The **Patient** page shows the patient's basic demographic details, including delivery and alternative addresses – see 'Recording patient personal details' on page 33 and 'Recording addresses' on page 34 for information on how to edit these details.
- The **Clinical** page contains information about the patient's next of kin, cultural background and communication requirements or preferences and a clinical summary of the patient's condition – see 'Adding clinical details and further demographic information' on page 39 for more information.
- The **Notes** page contains notes entered by assessors and administrators about the patient, including details of contact with the patient – see 'Adding a note to a patient's record' on page 39 for more details.
- The **Delivery Notes** page (if present) contains information recorded by the distributor; for example, the reason for a delivery failure may be recorded.

- The **Prescription** page lists prescriptions for this patient.
  - To see full details of the prescription and make any necessary changes, click the **Prescription name**.
  - For callback prescriptions (where the products are only dispatched if someone confirms they are required), an icon indicates the prescription's status and more details are shown if you hold your mouse cursor over the image.
    -  The prescription is 'on hold' – no callback within the normal time frame
    -  A callback is expected
      - A callback has been received
- The **Pending orders** and **Delivered orders** pages show details of orders that are expected or have been delivered respectively. You cannot enter any information on this page.  
The **Pending order** page may contain details of orders that are awaiting authorisation and may contain information if assessors are given a financial limit.
- The **Collections** page shows details of any collections of products that have been arranged from this patient.

At the bottom of each page are a number of options:

- **Edit** enables you to make changes to the information on the **Patient**, **Clinical** and **Notes** pages (these are the only ones you can edit – see 'Amending a patient record' on page 38 for more information).
- **Create emergency or ad hoc order** takes you to the emergency order page (see 'Creating an emergency or ad hoc order' on page 58).
- **Transfer** enables you to transfer the patient to another district or delivery route.
- The Excel () and PDF () icons enable you to export the patient's information in a format that can be opened in a spreadsheet (such as Excel) and as a PDF (which can be printed and used when reassessing a patient).
  - The Excel option only shows information from the **Patient** page.
  - The PDF option includes information from the **Details**, **Clinical** and **Prescription** pages as well.

## Registering a patient

To ensure that orders are not duplicated and to contain costs, it is essential that each patient is only registered once on HDS. If a patient moves address, he or she can be transferred, maintaining a full history.

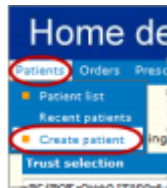
Registering a patient creates a record for that patient that contains basic demographic details. To add more information to that patient's record, you must edit it (see 'Amending a patient record' on page 38).

To register a patient:

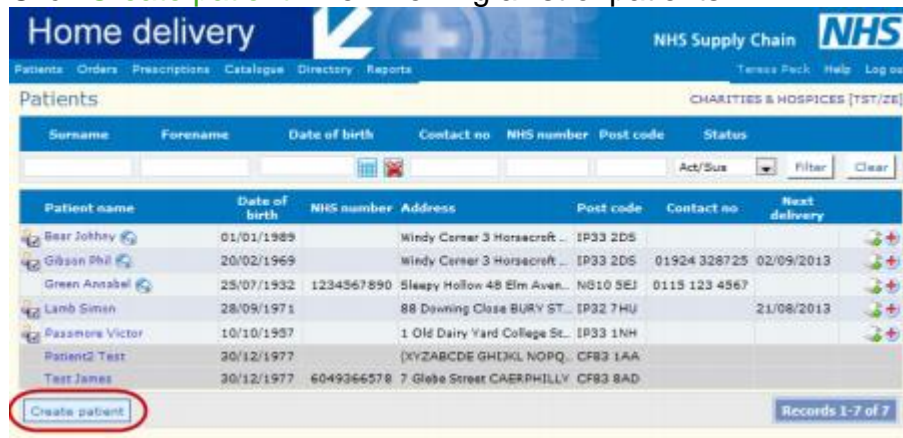
1. Either:



- Select **Patients** and then **Create new patient** from the menu.



- Click **Create patient** when viewing a list of patients.



- Enter basic information about the patient (**Surname**, **Forename** and **Date of birth**) into the page that opens to check that the patient is not already registered.
  - You can enter full or partial names.
  - You can enter the date of birth either using the calendar or typing it manually in the format dd/mm/yyyy.
- Click **Lookup**.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports

CHARITIES & HOSPICES [TST/ZE]

Create new patient

**Pre entry check**

Surname: Green

Forename: A

Date of birth: [Calendar icon]

**Lookup** **Skip**

You can choose to Skip the lookup, but this is not recommended.

Any patients whose details match those you gave are displayed.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery

CHARITIES & HOSPICES [TST/ZE]

Create new patient

**Pre entry check**

Surname: Green

Forename: Amanda

Date of birth: 01/12/1992

**Lookup** **Skip**

**Patient Name** **Date Of Birth**

Green Annabel 25/07/1992

**Click here to continue**

- If you think an existing patient may be the patient you are looking for, click the patient's name to go to that record.
- If you still want to create a new patient record, click [Click here to continue](#). The [Create new patient](#) page opens.

### Recording patient personal details

Record the patient's personal details in the Patient information section at the top of the page, selecting from drop-down lists or by typing information into a box.

- **Forename**, **Surname** and **Date of birth** may already be completed if you entered them when searching for the patient (see example above). Check they are correct and add or amend as necessary.
- The **Status** for new patients is automatically set to **Active**.
- The **Contact no** and **Additional contact** no may either be the patient's telephone numbers or those of a relative.
- The **Assessor** is the person who has determined that this patient requires products from HDS – select from the list.
- Check the **NHS number** carefully - it used to identify this patient throughout the NHS.

Select the **GP practice** with which the patient is registered.

- If the patient is registered with a GP practice in your trust, select the practice from the dropdown list.
- If the patient is not registered with a GP practice, or you do not know which practice, select Unknown GP practice – the top entry in the list.
- If the patient is registered with a GP in another trust, click the + button to the right of the dropdown list. This expands the **GP practice** area to include a search option and another selection list that will be populated with search results.
-



- Type your search text into the GP Search criteria box (A) and click GP Search (B). All matching GP practices are listed in the drop-down list below the search box (C).
- Select the appropriate GP practice from the list and click Select (D). The expanded area collapses again, and the selected GP is shown in the GP practice box (E).

This does not transfer the patient to another trust – it just enables you to record the correct GP address.

### Recording addresses

Address details are specified using an automatic postcode lookup facility. If the address you want cannot be found in this way, someone with the administrator role can enter an address manually (see 'Recording addresses manually' on page 38).

### Patients living at home

If this patient lives in a care home, follow the instructions in 'Delivery to a care home' on page 35.

There are three address areas:

- The **Delivery address** (shown in red in the **Address information** section) is the usual delivery address. It may not be the patient's home; it could, for example, be a relative who is normally able to receive the delivery on behalf of the patient.
- The **Alt delivery address** (in the **Delivery information** section) should be completed if possible as it will be used if the main address is not available (for example, if no one can receive the delivery because of holiday).
- The **Home address** is the address where the patient would be assessed. This need not be entered if the delivery address is the patient's home address.

To find an address from its postcode:

- Type the postcode into the two boxes provided, using the space as the separator. For example, the postcode IP32 6JR will be recorded by typing IP32 into the first box and 6JR into the second box.
- Click **Lookup**. The **House no** box will contain the word Searching... while the lookup is taking place.
- Select the correct **House no** from the drop-down list at the top of the section.

Home delivery is selected automatically, and the **Delivery day** is set by the distributor according to the delivery route that incorporates that postcode.

### Delivery to a care home

Patients who live in a Care Home are registered in the same way as any other patient.

In the **Address information** section:

1. Click the Home delivery box to clear it (it is selected automatically) (A).  
The page changes to enable you to specify care home details.  
Viewing, creating and amending patient records  
Home Delivery Service (HDS): Guidance Notes (version 3.1) 36
2. Select the Home name from the drop-down list (B).

Address information			
Care home			
Home name	Sleepy Hollow	Home delivery	<input type="checkbox"/>
Address line 1	48 Elm Avenue	Delivery day	Friday
Address line 2		Care home service type	None
Town	NOTTINGHAM		
County	Nottinghamshire		
Post code	NG10 5EJ		
Pre delivery SMS number		Post delivery SMS number	
Active	<input type="checkbox"/>	Active	<input type="checkbox"/>
		Post delivery SMS contact	

The address details for the care home are shown for you to check that you have chosen the correct one.

Other addresses are not required for patients living in care homes – there will always be someone to accept a delivery.

3. If the **Care home service type** has been set to one value, it is displayed automatically. If the care home is registered with more than one type, you must select the appropriate type for this patient. For example, a home may be registered as both EMI (elderly mentally infirm) and Nursing home.

If the **Care home service type** has not been set at all, None is displayed. Please contact Customer services (either within your trust or at NHS Supply Chain), who will record the correct type against the Care home.

If you choose to record a home address for the patient, follow the instructions in 'Patients living at home' on page 35.

### Recording a number for pre- and post-delivery SMS messages

You can record a number – usually a mobile phone number – to receive pre- and postdelivery SMS (text) messages.

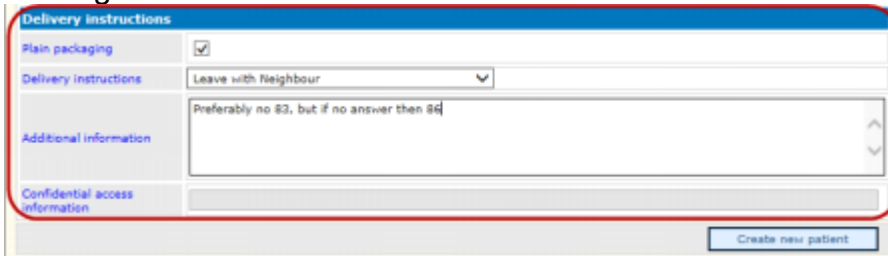
Although the numbers can be recorded now, selecting Active does not enable text messages. This is preparation for a future service not yet available.

### Providing delivery instructions

Many of the options in this section are not applicable to care home deliveries.

The **Delivery instructions** section at the bottom of the page enables information to be recorded that is included on the delivery documentation, as well as specifying how the delivery is to be packaged.

1. Select **Plain packaging** if the patient requires this option.  
Not available for deliveries to Care Homes.
2. Select an appropriate delivery instruction from the list available.
  - If **Leave with neighbour** is selected from the list of delivery instructions, Plain packaging is automatically selected but can be cleared.
  - If **Leave with neighbour** or **Other** is selected, **Additional information** must be provided.
  - If **Contact control tower** is selected, **Confidential access information** must be provided.
3. Record any **Additional information**, for example “Knock loudly as patient is hard of hearing”.



**Delivery instructions** and **Additional information** are limited to 80 characters in total, including a space, a dash and a space to separate the two pieces of information. This is the maximum that is visible to the driver. If **None** or **Other** is selected as a delivery instruction, then **Additional information** is limited to 80 characters ('None' and 'Other' are not printed).

4. In **Confidential access information**, enter the access code if **Contact control tower** is the selected **Delivery instruction**. A maximum of 80 characters can be entered.

This information is not visible to the driver. If the delivery instruction is to **Contact control tower**, the driver will contact for the code when needed.

If the **Delivery instruction** is subsequently changed without clearing the **Confidential access information** field, the field is disabled but any information it already contains is still visible.

### Creating the patient record

Click **Create new patient** to create the new patient record. This may take a few minutes, but on completion a message is shown indicating that the record has been successfully created.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery Mrs Sarah Peck Help Log out

Create new patient CHARITIES & HOSPICES [TST/ZE]

Patient information			
Title/Salutation	Miss	Gender	Female
Surname	Green	Date of birth	01/12/1992
Forename	Amanda	Home delivery	Yes

✓ Patient 'Amanda Green' created successfully

## Recording addresses manually

You must have the *Administrator* role to enter addresses manually.

You can switch between manual and automatic address entry by clicking on the option that appears to the right of the address heading.

- If you are currently in 'automatic' mode, **[Manual]** is displayed.
- If you are currently in 'manual' mode, **[Automatic]** is displayed.

**Delivery information**

Delivery address [Manual]

House no Unit 7a Progress Way Home delivery ☒

- After clicking on create new patient the update will take a few moments as the system is validating all the entered data, after which the following screen will be displayed.

## Amending a patient record

If you want to add clinical or other details to a patient record, you can edit it.

To edit a patient's record, click Edit at the bottom of any page in the record.

The display changes to show only those pages you can edit:

- **Patient** - edit the information on the Patient page using the instructions for adding a patient (see 'Registering a patient' on page 32). The information on this page is primarily contact and delivery details.
- **Clinical** - this page contains further demographic information (such as ethnic group), carer details and clinical information. See below for guidance on completing this section.
- **Notes** - see 'Adding a note to a patient's record' on page 39.

If you have the *HDS Enquirer* role, you can add notes to a patient's record at any time – without needing to select **Edit**.

## Adding clinical details and further demographic information

The **Clinical** page is split into three sections:

- **Patient clinical information** holds ethnicity, language, carer and next of kin.

- **Clinical information** holds basic clinical details about this patient, including discharge details (see 'Discharging a patient' on page 42) and date of death (see 'Recording the death of a patient' on page 42).
- **Patient reviews** enables you to specify review dates for this patient.

### Adding a note to a patient's record

People with any HDS role (including *Enquirer*) can add notes to a patient's record.

Information about the patient can be recorded on the notes page. A number in brackets on the tab shows the number of notes available.

To add a note:

- If you have the *Enquirer* role, simply type the text into the large box area.
- If you have any other role, click **Edit** and then type into the box that appears.

Click **Add Note**. Your name and today's date are recorded automatically. A message is shown confirming that the note has been added.

✓ Note added successfully

You cannot change or delete existing notes.

### Changing delivery day

If you change a patient's **Delivery Day** (on the **Patient** page), any prescriptions that are amended to accommodate the change are listed.

**Home Delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Delivery Elaine C Sayer Log out

Amend patient Evans John MANCHESTER MENTAL HEALTH PARTNERSHIP [TST/MS]

Patient information			
Title/Salutation:	Mr.	Gender:	Male
Surname:	Evans	Date of birth:	01/01/1908
Forename:	John	Home delivery:	Yes

Prescription name	Previous next delivery date	New next delivery date
new prescrip	15/01/2007	18/01/2007
evans	12/02/2007	15/02/2007
pills	26/02/2007	01/03/2007
newpills	26/02/2007	01/03/2007
another text	26/02/2007	01/03/2007
James Test	26/02/2007	01/03/2007

✓ Patient 'Evans John' saved successfully  
As a result of the delivery day being changed for this patient, the above prescriptions were automatically amended

## Recording reviews

Patients are regularly reviewed to ensure that they still require the products that have been prescribed and that those products are meeting their needs.

To record a review:

1. Find the patient's record and click the Clinical tab.
2. Click **Edit** at the bottom of the page.
3. Click the calendar alongside the **Assessment date** box and select the date that the review took place.
4. Select the name of the **Assessor** from the drop-down list.
5. Click **Save changes**. A message is displayed if the record is successfully saved.

If you have access to the reports, you can identify which patients are due for review and print a review form for each of them. See 'Patient reassessment report' on page 67.

## Transferring a patient

If a patient moves from one trust to another, he or she can be transferred.

To transfer a patient to a different district or trust:

1. Click **Transfer** at the bottom of one of the pages in the patient's record.
  - If orders exist that have not yet been delivered, the patient cannot be transferred, and an error message is shown (see example below).

**Home Delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery Elaine Sayer Help Log out

View patient BRACKNELLE JEAN SUE RYDER CARE HOMES [TST/YC]

Cancel

**This patient cannot be transferred:-**  
There are outstanding orders pending delivery for this patient.

- If there are no outstanding orders, the **Transfer patient to a new district** page opens.
2. Select the new district from the dropdown list.
  3. For patients in their own homes, select the new delivery route.



This list is populated automatically based on the district selected in the previous step.

If no delivery routes exist for the district that the patient is being transferred to, the patient is transferred with a status of 'suspended'. The patient's record can then be updated by the new district and a delivery route agreed with a distributor.

The screenshot shows the 'Home delivery' section of the NHS Supply Chain system. The user is logged in as 'Mrs Sarah Pack'. The page title is 'View patient 'Anderson Amelia''. Below the title, there is a section titled 'Transfer patient to new district'. It asks 'Are you sure you wish to transfer patient 'Amelia Anderson' to another district?'. There are two dropdown menus: 'District to transfer the patient to' and 'Delivery Route to transfer the patient to', both currently showing '-- Select a value --'. At the bottom right, there are 'Confirm transfer' and 'Cancel' buttons.

For patients living in a care home, the option is given to transfer the patient to a new care home.

Select the appropriate **Care Home service type** from the list.

#### 4. Click **Confirm transfer**.

A message is displayed confirming that the transfer has been successful, and the following changes are made:

- The requisition point in the warehouse management system for the patient's original delivery point (unless the patient is transferred from a nursing home) is deactivated.
- Patient, prescription and order details are transferred to the new district, and a new requisition point is created in that district (unless the patient has transferred to a care home).
- Clinical information, review date, and previous order history are transferred.
- The 'reviewed by' person is set to the username of the person transferring the patient.
- The nurse assessor is cleared.

The screenshot shows the 'Home Delivery' section of the NHS Supply Chain system. The user is logged in as 'Elaine Sayer'. The page title is 'View patient Hancock Bob'. Below the title, there is a green success message: 'Patient 'Bob Hancock' has been successfully transferred to 21/TST BOLTON HOSPITALS NHS TRUST'. Below the message, there is a link: 'Click [here](#) to return to the patient list'.

### Discharging a patient

To discharge a patient, you must change that patient's status and set a discharge date and discharge reason.

- The patient's **Status** is set on the **Patient** page in the patient record.
- **Discharge date** and **Discharge reason** are set on the **Clinical** page.

You must complete all three pieces of information before you can save the record.

## Recording the death of a patient

A patient death can be recorded in the individual patient's record or when confirming the callback information for a Carehome (when multiple deaths can be recorded simultaneously).

### Recording a death in the patient's record

To record the death of a patient:

1. Change the patient's **Status** to **Deceased** on the **Patient** page.
2. Enter the **Deceased date** on the patient's **Clinical** page using the calendar.

Recording a patient's date of death deletes the associated requisition point in the warehousing system. If you change this information and reactivate the patient record, a new requisition point is created.

### Recording a death when confirming callbacks for patients in care homes

The **Care homes callback checklist report** may show that one or more patients have died. These deaths can be recorded using the **Manage Care homes Delivery** page.

1. From the **Directory** menu option, select **Care Homes**.
2. Find the appropriate care home in the list.
3. Click the **Manage delivery** icon to the right of the **Next del. date** column.  
The page enabling you to confirm delivery for that particular care home opens.
4. Select the patients whose death you want to record using the checkboxes to the left of their names (or select the checkbox at the top of the list to select them all).
5. Click **Decease Patients**.  
You are asked to confirm that you want to mark selected patients as deceased.
6. Click **OK**.

The patients recorded as deceased are immediately removed from the list.

The following changes are made to the records of the patients who were selected:

- Their **Status** (in the **Patient Information** section of the Patient page) is set to **Deceased**.
- Their **Deceased date** (in the **Clinical information** section of the **Clinical** page) is set to the day that the death was recorded.
- A note is added to the deceased patient's **Notes** page: "Marked as deceased during care home delivery confirmation."

## Managing prescriptions

Prescriptions specify the products to be delivered to patients, including the quantities, frequency and delivery days of items.

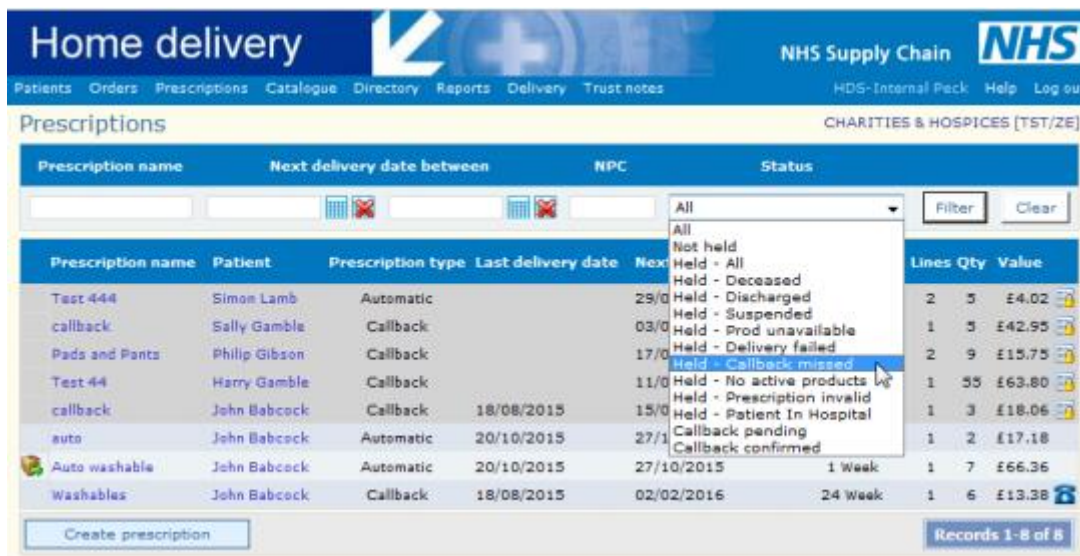


## Viewing prescriptions

- To view all prescriptions for your trust, select Prescriptions and then Prescription list.
- To view prescriptions for a specific patient, select the Prescriptions page in that patient's record.

A full list of prescriptions is displayed, with boxes at the top of the page to enable you to filter the list:

- Type part of a prescription name in the first box to see only prescriptions where the name contains that text.
- Specify an earliest and latest delivery date to see only prescriptions due for delivery between those dates.
- Type an NPC to see only prescriptions containing a particular product.
- Select a status to see only prescriptions with that status.



Prescription name	Patient	Prescription type	Last delivery date	Next delivery date	NPC	Status	Lines	Qty	Value
Test 444	Simon Lamb	Automatic		29/0		Callback	2	5	£4.02
callback	Sally Gamble	Callback		03/0		Callback	1	3	£42.95
Pads and Pants	Philip Gibson	Callback		17/0		Callback	2	9	£15.75
Test 44	Harry Gamble	Callback		11/0		Callback	1	55	£63.80
callback	John Babcock	Callback	18/08/2015	15/0		Callback	1	3	£18.06
auto	John Babcock	Automatic	20/10/2015	27/1		Callback	1	2	£17.18
Auto washable	John Babcock	Automatic	20/10/2015	27/10/2015	1 Week	Callback	1	7	£66.36
Washables	John Babcock	Callback	18/08/2015	02/02/2016	24 Week	Callback pending	1	6	£13.38

You can combine filtering options to reduce the list still further.

When viewing a list of prescriptions:

- Click the prescription name to open the prescription to check details or make changes.
  - You can see when the prescription was created and authorised, and who delivered the items listed on it.
  - To make changes, click the **Edit** button. You can change the **Prescription name**, **Cycle length**, **Next delivery date** and the products and quantities to be delivered. See 'Creating a prescription' (below) to understand how to enter the information.

The screenshot shows the 'Home delivery' section of the NHS Supply Chain website. The page title is 'View prescription "Night-time pants"'. The user is logged in as 'Mrs Sarah Peck'. The page displays a table of prescription information and a table of items.

Prescription information			
Prescription name	Night-time pants	Cycle length	2 Week
Patient name	Annabel Green	Last delivery date	
Prescription type	Automatic	Next delivery date	20/12/2013
Care home:	Sleepy Hollow	Delivered via	DHL Supply Chain
Created	CLIMB 30/10/2013 16:49:52		
Authorized	PECKS 11/12/2013 12:06:14		

NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Overstk	Current Overstk	Line Qty	Line Value
CFP1094H	Fixation pants for use with gads with shorter leg Euron net pants comfort super small Euron Net Comfort 12210051 ONTEX LTD ( HOME DELIVERY)	Pack of 5	1+ 2.06	2	28	2	0	6	£12.36
<b>Total</b>								<b>6</b>	<b>£12.36</b>

Buttons: [Edit] [Back]

- Click the patient's name to open the patient's record.
- Place your mouse cursor over an icon to the far right of a prescription to see a message about it.
- Create a prescription (a **Create prescription** button is shown at the bottom of the list if you have the *Assessor* role).

## Creating a prescription

You need the *Assessor* role to create a prescription.

To create a prescription either:

- Select the **Prescriptions** tab and click **Create prescription**.
- Click **Create prescription** at the bottom of the list of current prescriptions.

A blank prescription form is shown.

1. In the **Prescription name** field, type a name for the prescription.  
This name should be clearly understood by your colleagues.
2. Select the **Patient name** from the dropdown menu.  
This must be selected first, as the available delivery dates are calculated based on the geographic location of the patient.
3. Select the **Prescription type** from the dropdown menu.
  - **Automatic** prescriptions are delivered regularly without outside intervention.
  - **Callback** prescriptions require a patient, patient representative or Trust staff to confirm that the items are still required. The number to call is printed on the delivery paperwork and invoice – it is free to call from landlines but calling from a mobile phone may incur charges.  
This call should be received at least 72 hours before the delivery day (for example, if delivery is due on day 4, the call should be received on day 1).  
Calls should not be made more than 10 working days before the expected delivery date.

Prescriptions for patients in a care home automatically use the prescription type of the care home.

The screenshot shows the 'Home delivery' section of the NHS Supply Chain interface. The 'Prescription information' form is displayed with the following details:

Prescription name	Incontinence Pads and Pants	Cycle length	2 Week
Patient name	Green Annabel (25/07/1932)	Last delivery date	
Prescription type	Automatic	Next delivery date	20/12/2013

Below the form is a table with columns: NPE, Description, Unit, Issue, Pricing, Daily Req, Cycle Req, Line Overstk, Curr Overstk, Line Qty, and Value. The 'Total' row shows 0 and £0.00. Buttons for 'Save', 'Cancel', and 'Delete' are at the bottom right.

4. Select the **Cycle length** of the prescription.  
The cycle length is the frequency of deliveries.
5. Specify the **Next delivery date**.  
The options in this list are specified by the distributor for the patient's region.  
Deliveries will not start until this date.  
Dates in red are bank holidays and should not be selected unless you have a prior arrangement with the distributor.
6. The **Last delivery date** is the date the prescription was most recently delivered. It is blank for new prescriptions but is populated automatically once a delivery has been made.
7. Type an **NPC** code into the box.

This screenshot is identical to the one above, but with a red arrow pointing to the empty 'NPC' input field in the table below the prescription information form.

- Prescriptions can contain either HDS Direct products or Home Delivery products but not both. If a patient requires both, create two prescriptions.
8. Press the TAB key to move out of the box, or click elsewhere on the page. Do not click on one of the buttons.  
Information about the product is displayed – check carefully that you have selected the correct one.  
All prices include VAT.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery Mrs Sarah Peck Help Log out

Prescriptions CHARITIES & HOSPICES [TST/ZE]

**Prescription information**

Prescription name: Incontinence Pads and Pants Cycle length: 2 Week

Patient name: Green Annabel (25/07/1932) Last delivery date:

Prescription type: Automatic Next delivery date: 20/12/2013

NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Overstk	Curr Overstk	Line Qty	Line Value
CFP1101H	Shaped pad absorbency band I2 Soft ultra mini OShaped pad absorbency band I2 Soft ultra mini O Attends 205075 ATTENDS LIMITED (HDS)	Pack of 28	1+ 1.46	5	0	0	0	0	£0.00
<b>Total</b>								0	£0.00

Save Cancel Delete

9. Specify the **Daily Req** (daily requirement).

The **Line Qty** (line quantity) is calculated automatically: it can be overwritten. For example, if an item is provided in a pack of 28 and 5 items are required each day, 3 packs are needed every 2 weeks.

If the prescription type is **Automatic** and the number required for the period between deliveries is not divisible by the product pack size, the line quantity is automatically rounded up to a whole number of packs. The difference between the number required and the number delivered is recorded as an overstock.

This rounding is repeated for subsequent orders until the overstock quantity is equal to the product pack size, at which point the order quantity is reduced by one pack.

**Home delivery** NHS Supply Chain

Patients Orders Prescriptions Catalogue Directory Reports Delivery Mrs Sarah Peck Help Log out

Prescriptions CHARITIES & HOSPICES [TST/ZE]

**Prescription information**

Prescription name: Incontinence Pads and Pants Cycle length: 2 Week

Patient name: Green Annabel (25/07/1932) Last delivery date:

Prescription type: Automatic Next delivery date: 20/12/2013

NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Overstk	Curr Overstk	Line Qty	Line Value
CFP1101H	Shaped pad absorbency band I2 Soft ultra mini OShaped pad absorbency band I2 Soft ultra mini O Attends 205075 ATTENDS LIMITED (HDS)	Pack of 28	1+ 1.46	5	70	14	0	3	£4.38
<b>Total</b>								3	£4.38

Save Cancel Delete

10. Click **Save** to save the prescription.

If a minimum prescription value is set for your organisation, the total value of a prescription must exceed this amount. Either increase the quantity of products or the time between deliveries.

Your prescription value does not meet the minimum of £10.00. Please increase the cycle length or add more products.

## Finding catalogue items

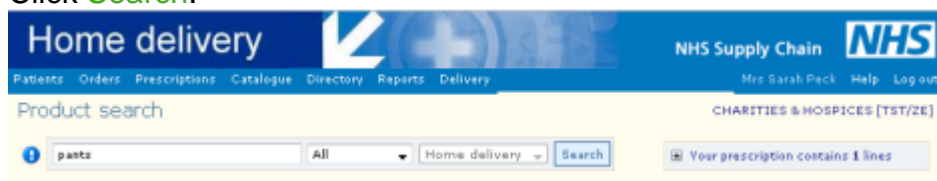
If you know the NPC of a product, you can type it directly into the box on the patient's prescription. If you do not know the NPC code, you can find it by searching the catalogue. Once you have found the code, you can add it automatically to the prescription.

To find a product in the catalogue:

1. While creating or editing a patient's prescription, click **Catalogue** on the menu. The **Product search** page opens.



- On the left are boxes for you to enter search criteria.
  - On the right is information about the prescription. Click the plus sign ( + ) to see details.
2. Type some text relating to the product into the first box.
  3. Select what you are trying to match (**All**, **NPC**, **MPC**, **Brand** or **Description**) from the dropdown list.
  4. Select the type of product you are looking for:
    - **Home delivery** products are delivered by the distributor.
    - **HDS** direct products are delivered by the supplier directly to the patient's home or to a care home. These are likely to be products that the patient requires less frequently.
  5. Click **Search**.



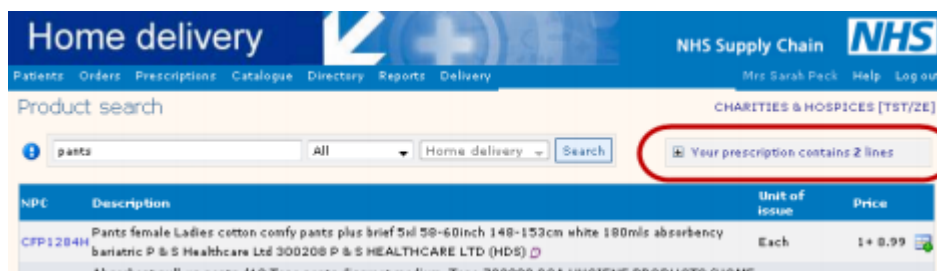
A list of matching products is shown.

6. Find the product you want in the list displayed and click the icon on the right of the row to add it to the prescription.

To view details of the product, click its NPC code.



The number of lines in the prescription increases to show that the product has been added.



7. Continue searching for and adding products.  
Because a prescription can only contain either HDS Direct products or Home Delivery products, once you've added a product of one type to the prescription, the search is restricted to products of the same type.
8. When you have finished adding products, select **Prescriptions** and then **Create prescription** from the menu.  
The **Create prescription** page opens again showing the new products added to the prescription.
9. Specify the **Daily Req** for the new products.  
The **Cycle Req** (cycle requirement – the number required between one delivery and the next) and the **Line Overstk** (line overstock – the surplus quantity because complete packs only are delivered) are both shown.
10. Click **Save** to save the prescription.

Click the information icon to the left of the filter options to see details of absorbency for various pads and inserts.

Absorption capacity bands and ranges						
Insert Band Number	Minimum Absorbency Capacity (g)	Maximum Absorbency Capacity (g)	Absorbency range (g)	Diaper band number	Minimum Absorbency Capacity (g)	Maximum Absorbency Capacity (g)
11	0	49	50			
12	50	99	50			
13	100	199	100			
14	200	299	100			
15	300	449	150			
16	450	599	150			
17	600	799	200			
18	800	999	200			
19	1000	1249	250			
110	1250	1499	250			
111	1500	1799	300			
112	1800	2099	300			
113	2100	2499	400			
114	2500	2899	400	D14	1300	1699
115	2900	3299	400	D15	1700	2099
			400	D16	2100	2499
			400	D17	2500	2899
			400	D18	2900	3299
			400	D19	3300	3699
			400	D20	3700	4099
			400	D21	4100	4499
			400	D22	4500	4899

## Suspending a prescription

To suspend a prescription, you must find it and edit it. See 'Viewing prescriptions' on page 44.

- To suspend an entire prescription - for example, because the patient has been admitted to hospital – change the **Next delivery date** to when you want the deliveries to restart.
- To suspend an individual item, clear the box to the left of the **NPC** on that line.



**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Mrs Sarah Peck Help Log out

Prescriptions CHARITIES & HOSPICES [TST/ZE]

**Prescription information**

Prescription name: Night-time pants Cycle length: 2 Week  
 Patient name: Green Annabel (25/07/1932) Last delivery date:  
 Prescription type: Automatic Next delivery date: 20/12/2013

NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Overstk	Curr Overstk	Line Qty	Line Value
<input checked="" type="checkbox"/> 1094H	Fixation pants for use with pads with shorter leg Euron net pants comfort super small	Pack of 5	1+ 2.06	2	20	2	0	6	£12.36
									<b>Total</b> 6 £12.36

Save Cancel Delete

Save your changes. Suspended subscriptions are marked with the 'stop' icon (⏹).

**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Elaine C Sayer Help Log out

Patients MANCHESTER MENTAL HEALTH PARTNERSHIP [TST/MG]

Surname	Forename	Date of birth	Contact no	NHS number	Post code

Filter Clear



Patient name	Date of birth	NHS number	Street	Post code	Contact no	Next delivery
Applegate Doreen	14/09/1925		ABBEY COURT NH (DERBY) ...	DE55 4QJ		
Applegate Doreen	10/01/1978		17 Downing Close BURY ST. ...	IP32 7HU		

To suspend all prescriptions for a patient, change the patient's **Status** (on the **Patient** page) to **Suspended**. The 'stop' icon (⏹) is shown alongside the patient's name when viewing patients.

### Reactivating a prescription

When you return the status to **Active**, you must update the next delivery date for that prescription.

If you have changed the status of a patient from **Suspended** to **Active**, a list of that patient's prescriptions are shown – you must select and reactivate them if you want the prescriptions to resume.

**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Elaine C Sayer Help Log out

Amend patient Cruickshank Richard MANCHESTER MENTAL HEALTH PARTNERSHIP [TST/MG]

**Patient information**

Title/Salutation: Mr. Gender: Male  
 Surname: Cruickshank Date of birth: 17/02/1960  
 Forename: Richard Home delivery: Yes

The following prescriptions may need to be reactivated for this patient.  
 Tick the boxes for the prescriptions which you would like to reactivate and then click the 'Reactivate selected prescriptions' button

Prescription name	Prescription type	Last delivery date	Next delivery date	Cycle length	Lines	Qty	Value
<input type="checkbox"/> callback 2 weekly	Callback	27/07/2007	17/08/2007	2 Week	1	1	£4.04

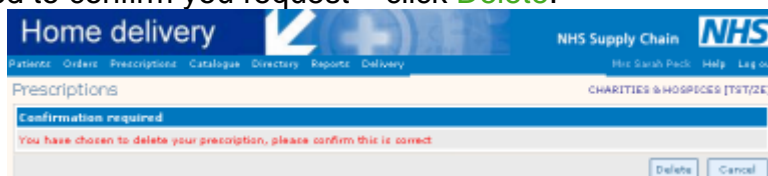
Reactivate selected prescriptions



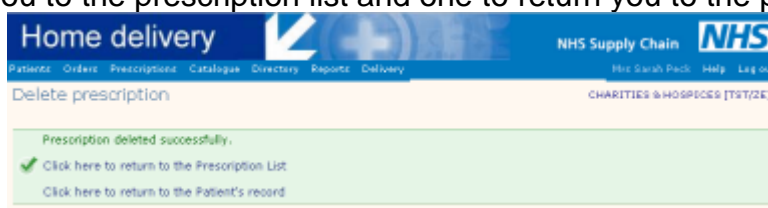
## Deleting a prescription

To delete a prescription, you must find it and edit it. See 'Viewing prescriptions' on page 44.

1. When you have identified the correct prescription, click **Delete**.
2. You are asked to confirm you request – click **Delete**.



3. A message is shown confirming that the prescription has been deleted, with two links – one to take you to the prescription list and one to return you to the patient's record.



## Replacing products across all prescriptions (global updates)

You must have the *HDS administrator* role to use the features described in this section.

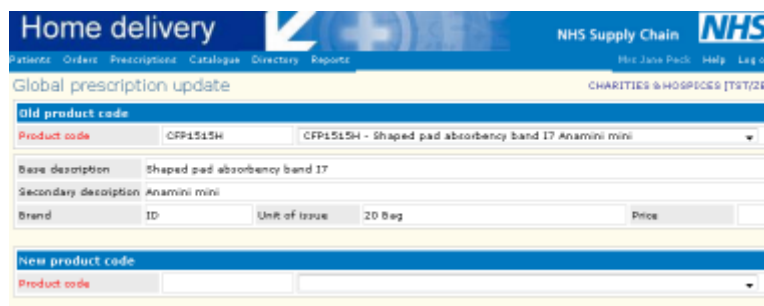
Prescriptions may exist for products that have been withdrawn. Often a suitable alternative is available, and it is possible to update all prescriptions simultaneously to replace an obsolete product with a replacement.

To update a product across multiple prescriptions:

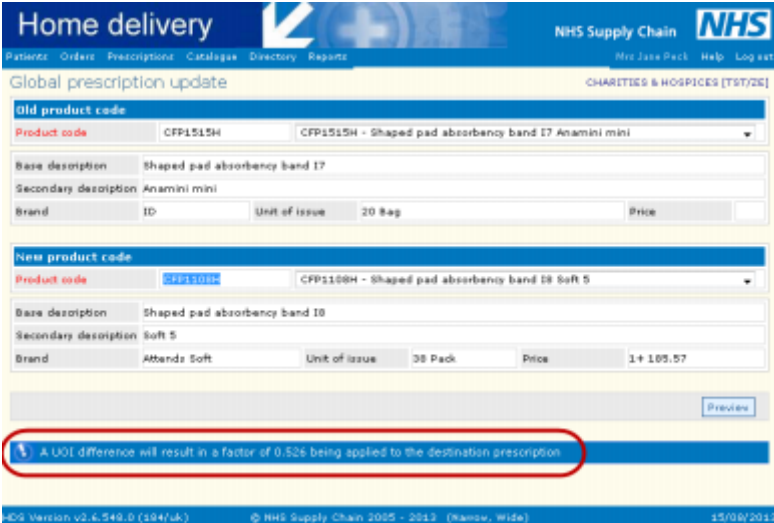
1. Select **Prescriptions** and then **Global update** from the menu.
2. Type the code of the product to be replaced into the **Product code** box in the **Old product code** section and press ENTER.

If you only know part of the NPC code, a list of possible matches is shown for you to choose from when you press ENTER.

Details of the selected product are shown for you to check that you have the correct product.



3. Type the new product code into the **Product code** box in the **New product code** section. As before, you can enter a part product code and select from the list displayed. Details of the selected product are shown for you to check you have found the correct one.



Home delivery NHS Supply Chain

Global prescription update

**Old product code**

Product code: CFP1515H CFP1515H - Shaped pad absorbency band 17 Anamini mini

Base description: Shaped pad absorbency band 17

Secondary description: Anamini mini

Brand: ID Unit of issue: 20 Bag Price:

**New product code**

Product code: CFP1108H CFP1108H - Shaped pad absorbency band 18 Soft 5

Base description: Shaped pad absorbency band 18

Secondary description: Soft 5

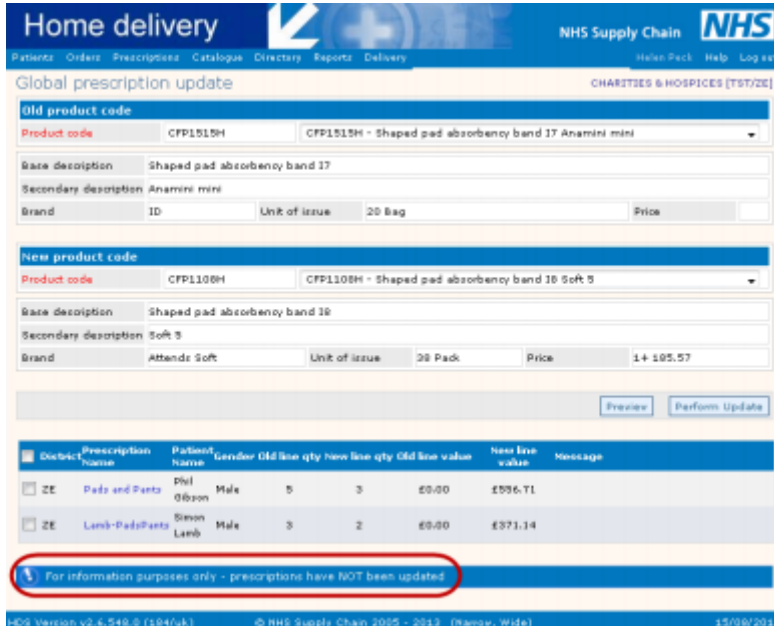
Brand: Attends Soft Unit of issue: 38 Pack Price: 14 105.57

**A UOI difference will result in a factor of 0.526 being applied to the destination prescription**

HDG Version v2.4.549.0 (194/uk) © NHS Supply Chain 2005 - 2013 (Narrow, Wide) 15/08/2013

If the pack sizes differ between the old and the new product, a message at the bottom of the screen explains the calculation that has been performed to account for the difference.

4. Click **Preview**.



Home delivery NHS Supply Chain

Global prescription update

**Old product code**

Product code: CFP1515H CFP1515H - Shaped pad absorbency band 17 Anamini mini

Base description: Shaped pad absorbency band 17

Secondary description: Anamini mini

Brand: ID Unit of issue: 20 Bag Price:

**New product code**

Product code: CFP1108H CFP1108H - Shaped pad absorbency band 18 Soft 5

Base description: Shaped pad absorbency band 18

Secondary description: Soft 5

Brand: Attends Soft Unit of issue: 38 Pack Price: 14 105.57

**For information purposes only - prescriptions have NOT been updated**

District	Prescription Name	Patient Name	Gender	Old line qty	New line qty	Old line value	New line value	Message
ZE	Peds and Panto	Phil Gibson	Male	5	3	£0.00	£596.71	
ZE	Lamb-Peds/Panto	Simon Lamb	Male	3	2	£0.00	£371.14	

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- A list of prescriptions that contain the old product are shown at the bottom of the page.
- If any prescriptions already contain the new product, that prescription will not be affected by the update.

5. Optionally click a prescription name to see the full prescription.

Prescription Information								
NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Qty	Line Value	
CFP1094H	Fixation pants for use with pads with shorter leg Euron net pants comfort super small Euron Net Comfort 12210051 ONTEX LTD (HOME DELIVERY)	Pack of 5	1+ 39.25	1	14	3	£117.75	
CFP1515H	Shaped pad absorbency band 17 Anamini mini ID 50004520 ONTEX LTD (HOME DELIVERY)	Bag of 20		6	84	5	£0.00	
						<b>8</b>	<b>£117.75</b>	

Click the **X** in the corner of the window to close the **Prescription Information**.

- Select the prescriptions that you want to update or select the box in the column headings row to update all prescriptions.
- Click **Perform update** to update selected prescriptions.

<input type="checkbox"/>	District	Prescription Name	Patient Name	Gender	Old line qty	New line qty	Old line value	New line value	Message
<input type="checkbox"/>	ZE	Pads and Pants	Phil Gibson	Male	5	3	£0.00	£556.71	
<input type="checkbox"/>	ZE	Lamb-PadsPants	Simon Lamb	Male	3	0	£0.00	£0.00	Not selected for update
✓ 1 prescription updated, 1 ignored									

A message is shown at the bottom of the page stating how many prescriptions have been updated and how many ignored.

Individual prescriptions that have not been updated are shown in red and a message giving the reason is displayed in the last column.

## Managing orders

Orders are created automatically from prescriptions, and manually by creating emergency orders.



To view orders for patients in your trust that have already been sent to distributors, select **Orders** and then select **Latest orders** from the menu.

You can sort the information shown by clicking on any column heading.


[View details of an order](#)

- If an order has been delivered and a signature obtained, the word 'Signature' is shown towards the bottom of the page, where delivery attempts are displayed. The signature of the person receiving the order can be viewed by holding your mouse cursor over the link as shown below.
- If no signature is available, the words 'Signature not available' are shown instead.

Home delivery

NHS Supply Chain



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Elaine Sayer Admin Help Log out

View order

SUE RYDER CARE HOMES [TST/YC]

Order information

Order number	15470H (399531)	Local reference	Andrew s prescription
Patient name	Andrew Witham (12027)	Order Type	Automatic
Delivery route:	DHL:routemon (1042)	Delivered via	TEST YC DHL <a href="#">Link</a>
Created	Elaine Sayer 20/01/2010 12:29:04		
Authorised	Elaine Sayer 20/01/2010 12:29:04		
Last updated	27/01/2010 14:41:28		

NPC	Description	Ord. Qty	Del. Qty	Exp. Del. Date	Status	Line value
CFP405H	Shaped pad absorbency band I8 Super Plus Euron Micro 10108280 Ontex Ltd ( Home Delivery) 	16	16	25/01/2010	DELIVERED	£44.32
ZE2000H	Delivery Charge HDS Whiteleys 	1	1	25/01/2010	DELIVERED	£5.55
ZE2002H	Service Charge 	1	1	25/01/2010	DELIVERED	£6.52
<b>Total</b>						£56.39

Delivery information

Delivery address	34 Downing Close	Delivery status	Delivered
	BURY ST. EDMUNDS	Requested delivery date	25/01/2010
	Suffolk IP32 7HU	Expected delivery date	01/02/2010

NPC	Non delivery reason	Comments	Signature	Line Qty	Delivery Timestamp
CFP405H	Delivered	HS Comments	<a href="#">Signature</a>	6	27/01/2010 15:05:42
CFP405H	Patient not at home (unable to access)	HS Comments	Si		010 14:35:26
CFP405H	Delivered	HS Comments	Si		010 13:46:38
CFP405H	Patient not at home (carded)	HS Comments	Si		010 13:22:26




## Status messages

Listed below are the order status updates sent from the distributor's warehouse system. These appear in the status of latest orders and are used in the criteria for reports.

- In progress
- Pending (usually applies to collections)
- Unallocated
- Allocated
- Dispatched
- Delivery failed
- Delivered
- Cancelled
- Picked

## Delivery failure reasons

This is a list of reasons why the distributor failed to make a delivery. They appear under the delivery information on the latest order page and are used in reporting.

- Address not found
- Incorrect address

- Item not loaded (3PL issue)
- Patient not at home carded
- Patient not at home uncarded
- Driver was out of time (3PL issue)
- Patient deceased
- Patient in hospital
- Patient refused delivery
- Vehicle breakdown/accident (3PL issue)




### Stock shortages

If there is insufficient stock of a product to complete an order, the quantity available is issued and the rest are placed on back order with the distributor. When more stock is available, the order is completed.


Two delivery attempts are made for each part of the order. If the stock shortage is not fulfilled on the second delivery attempt, any outstanding quantities are cancelled: status updates from the distributor will show the cancellation.

Status updates can be seen in the details of an order – click the Ref (the order number) in the list of latest orders to display details of an order. The example below shows updates indicating stock shortages.

Home delivery

NHS Supply Chain



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[Distributor](#)
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[Trust notes](#)








[Elaine Sayer](#)
[Admin](#)
[Help](#)
[Log out](#)

View order

SUE RYDER CARE HOMES [TST/YC]

Order information

Order number	15447H (399522)	Local reference	Presc Testpat CCSS5 1022 19
Patient name	CCSS5 1022 19 Testpat (12169)	Order Type	Automatic
Care home:	Test CH3 YC1 (101432)	Delivered via	TEST YC DHL Link
Created	James Spibey 11/01/2010 17:07:40		
Authorised	James Spibey 11/01/2010 17:07:40		
Last updated	11/01/2010 17:07:40		

NPC	Description	Ord. Qty	Del. Qty	Exp. Del. Date	Status	Line value
CFQ074H	All-in-one pads absorbency band D17 Medium extra plus waist size 80-125cm Euron Form 14326280 Ontex Ltd ( Home Delivery) 	10	10	18/01/2010	DELIVERED	£88.00
CFQ076H	All-in-one pads absorbency band D18 Large extra plus waist size 115-155cm Euron Form 14336280 Ontex Ltd ( Home Delivery) 	10	0	18/01/2010	STOCK SHORT	£101.80
CFQ079H	All-in-one pads absorbency band D19 Medium super plus waist size 80-125cm Euron Form 14328280 Ontex Ltd ( Home Delivery) 	10	5	18/01/2010	5 Stock Shortage Est. Restock 15/04/2010 5 Delivered	£99.60
CFQ080H	All-in-one pads absorbency band D21 Large super plus waist size 115-155cm Euron Form 14338280 Ontex Ltd ( Home Delivery) 	10	0	18/01/2010	STOCK SHORT	£132.70
CFQ081H	All-in-one pads absorbency band D18 Slip regular plus 10 medium maximum waist/hip size 80-110cm odour protection system Attends 201459 Attends Limited (Hds) 	10	10	18/01/2010	DELIVERED	£71.50
CFQ082H	All-in-one pads absorbency band D16 Slip active 8 large maximum waist/hip size 100-145cm odour protection system Attends 201336 Attends Limited (Hds) 	10	10	18/01/2010	DELIVERED	£85.60
ZE2002H	Service Charge 	1	0	18/01/2010	IN PROGRESS	£6.52
<b>Total</b>						<b>£585.72</b>

Delivery information

Delivery address	Test CH3 YC1 31 College Street  Milton Keynes MK1 1DH	Delivery status	Stock Shortage
		Requested delivery date	18/01/2010
		Expected delivery date	18/01/2010

NPC	Non delivery reason	Comments	Signature	LineQty	Delivery Timestamp
CFQ074H	Delivered	HS Comments	<a href="#">Signature</a>	10	26/01/2010 18:00:20

## Cancel an order

If you need to cancel an order, contact Customer Services at NHS Supply Chain.

Orders can only be cancelled before they have been dispatched. You can cancel HDS Direct orders while their status is pending.



- Emergency is displayed if the first possible delivery date in the list is selected.
- Adhoc order is displayed if any other delivery date is selected.

3. Check details of any prescriptions shown on the page to confirm that the emergency or ad hoc order is necessary.
4. Either type the code of the product in the **NPC** box or search for the product in the catalogue (see 'Finding catalogue items' on page 48).
5. Specify the quantity you require, bearing in mind the pack size.
6. Click **Checkout** to process the order.

## Confirming requirements (callback prescriptions)

Callback prescriptions are those where the assessor, the patient or the patient's representative must telephone to confirm that the order is required.

To confirm a single prescription while viewing prescription details:

1. From the **Prescriptions** page of the patient's record, select a prescription name to view details.
2. Click **Confirm Callback**.



**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Trust notes Joe Peck Admin Help Log out

View prescription 'Pads and pants' NHS LIVERPOOL CCG [TST/3B]

Prescription information			
Prescription name	Pads and pants	Cycle length	4 Week
Patient name	Samantha Allsop	Last delivery date	
Prescription type	Callback	Next delivery date	20/04/2017
Delivery route	Leicester Thurs	Delivered via	Training Distributor
Created	CTATALIA 10/04/2017 16:36:05		
Authorised	PECKJP 11/04/2017 13:13:47		

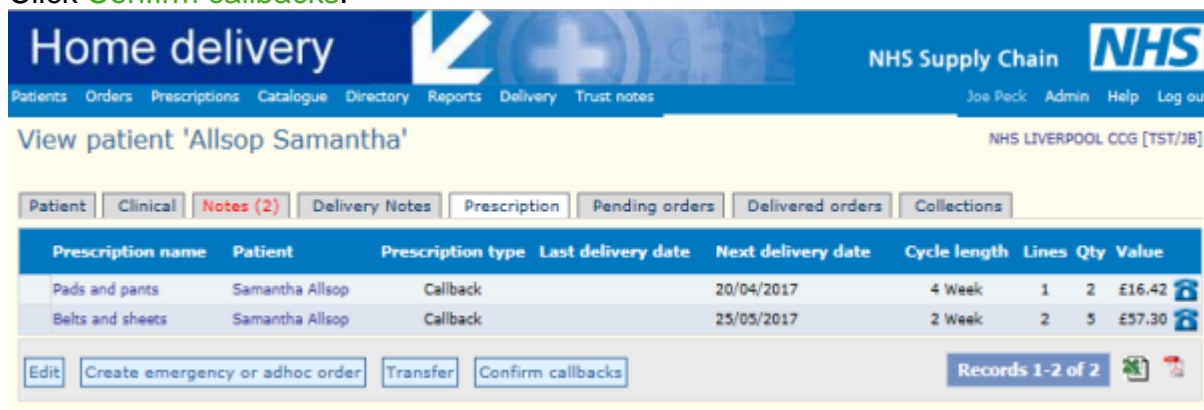
NPC	Description	Unit Issue	Pricing	Daily Req	Cycle Req	Line Qty	Line Value
CFQ425H	All-in-one pads absorbency band D19 Large 100 to 150cm Back Sheet PE Back Sheet Attends Slip Regular Plus 10 201473 ATTENDS LIMITED (HDS)	Pack of 14	1+ 8.21	1	28	2	£16.42
						2	£16.42



[Edit](#) [Confirm Callback](#)

## Confirming multiple prescriptions for patients living in their own homes

To confirm multiple callback prescriptions simultaneously:

1. Open the patient's record and select the **Prescription** page.
2. Click **Confirm callbacks**.



**Home delivery**  **NHS Supply Chain** 

Patients Orders Prescriptions Catalogue Directory Reports Delivery Trust notes Joe Peck Admin Help Log out

View patient 'Allsop Samantha' NHS LIVERPOOL CCG [TST/3B]

Patient Clinical **Notes (2)** Delivery Notes Prescription Pending orders Delivered orders Collections

Prescription name	Patient	Prescription type	Last delivery date	Next delivery date	Cycle length	Lines	Qty	Value
Pads and pants	Samantha Allsop	Callback		20/04/2017	4 Week	1	2	£16.42
Belts and sheets	Samantha Allsop	Callback		25/05/2017	2 Week	2	5	£57.30

[Edit](#) [Create emergency or adhoc order](#) [Transfer](#) [Confirm callbacks](#) [Records 1-2 of 2](#)

If the prescriptions have different delivery dates, a warning message is shown.

A warning is also shown if any prescriptions are held.

3. Click **OK** to close the messages, if displayed.

4. Select the **Confirm** option for all prescriptions you want to confirm.

You can also mark individual lines in a prescription as inactive by clearing the tick from the **Active** column. You cannot mark all lines in a prescription as inactive – if you do, the change is not saved.

**Home delivery** NHS Supply Chain NHS

Patients Orders Prescriptions Catalogue Directory Reports Delivery Trust notes Joe Peck Admin Help Log out

Prescription confirmation for 'Samantha Allsop' NHS LIVERPOOL CCG [TST/3B]

**Unconfirmed prescriptions**

Pads and pants		4 weeks	Next delivery date 20/04/2017		Confirm	<input checked="" type="checkbox"/>
NPC	Description	Unit of Issue	Line qty.	Line value	Active	
CFQ425H	All-in-one pads absorbency band D19 Large 100 to 150cm Back Sheet PE Back Sheet Attends Slip Regular Plus 10 201473 ATTENDS LIMITED (HDS)	Pack of 14	2	£16.42	<input checked="" type="checkbox"/>	

Belts and sheets		2 weeks	Next delivery date 25/05/2017		Confirm	<input checked="" type="checkbox"/>
NPC	Description	Unit of Issue	Line qty.	Line value	Active	
CFP1239H	Belt product for moderate to heavy incontinence D16 Large 85-135cm Textile Back Sheet TENA Flex Plus 723330 SCA HYGIENE PRODUCTS (HOME DELIVERY)	Pack of 30	1	£12.54	<input checked="" type="checkbox"/>	
CFP1241H	Belt product for moderate to heavy incontinence D15 Small 50-80cm Textile Back Sheet TENA Flex Super 724130 SCA HYGIENE PRODUCTS (HOME DELIVERY)	Pack of 30	4	£44.76	<input checked="" type="checkbox"/>	

Confirm callbacks Back

5. Click **Confirm callbacks**.

You can confirm the same prescriptions again: the most recent confirmation date is used.

## Collection of unwanted products

Collections offer patients and care homes the opportunity to return unwanted products that are in good condition. Collections can only be arranged by Customer Services at NHS Supply Chain.

Details of collections arranged for an individual patient can be seen on the **Collections** page in that patient's record.

## Collections following the death of a patient

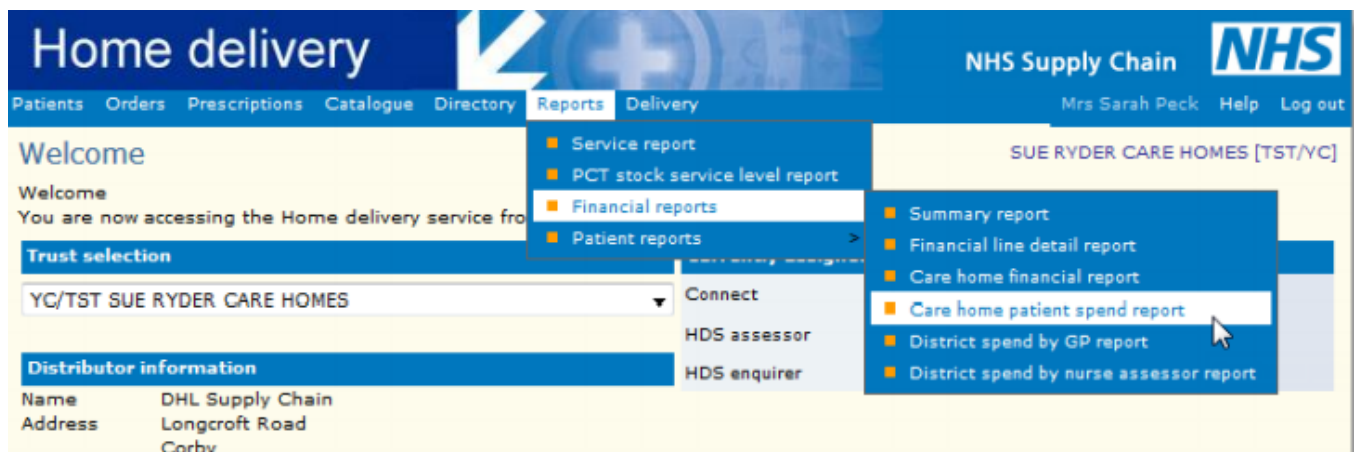
Changing a patient's status to 'deceased' does not mark the associated requisition point as inactive. This means that collections may still be made and credits applied to the requisition point.

## Reports

Two menus contain reports.

The main Reports menu contains two individual reports and two groups of reports:

- Service report
- PCT stock service level report
- Financial reports
- Patient reports



The **Delivery** menu holds reports relating to delivery.

The reports all work in the same way:

1. Select the criteria to use for the report from the drop-down lists available.
  - The period you want the report to cover.
  - The trust or other criteria you wish to specify.

Some options are only available if – for example – your login gives you access to more than one trust. Instructions for specifying criteria are only given for unusual options.

2. Click either **View** (to view the resulting report on screen) or **Export** (if available) to export the data to an Excel spreadsheet.

## Service report


You must have the *Enquirer*, *Assessor* or *Customer Services* role to access the delivery reports.

The service report is run for a financial period (a quarter or a week) within a financial year. You can run it for all districts that you have access to, or for a particular district.

The report shows:

- Summaries of the overall service level for patients in their own homes and those in care homes. Figures are given for unsuccessful deliveries (at both first and second attempt), stock levels and an overall service level.
- Details of the stock service level by supplier and by patient group (own home or care home). For each supplier or patient group, the total number of lines is shown, the quantity of stock shortages and the percentage of achieving the service level.

- Details of unsuccessful deliveries to patients receiving deliveries to their own homes, grouped by first and second delivery attempts and giving numbers for each reason.



NHS Supply Chain

## Service report

Start date: 01/04/2012

End date: 06/04/2012

All districts

### Summary of overall service level

Summary	Unsuccessful delivery at 1st attempt (%)	Unsuccessful delivery at 2nd attempt (%)	Stock service level (%)	Overall service (%)
Patient home	3.58	0.88	100.00	99.32
Care home	0.00	0.00	100.00	100.00
Nursing home	0.13	0.00	99.80	99.80
Residential home	0.21	0.05	99.90	99.85
EMI home	0.00	0.00	100.00	100.00
<b>Total</b>	<b>2.09</b>	<b>0.39</b>	<b>99.93</b>	<b>99.54</b>

### Stock service level by supplier

Supplier	Total order lines	Stock shortage	Service level (%)
Alcon (UK) Ltd	35	0	100.00
Alcon (UK) Ltd	3,480	0	100.00
Alcon (UK) Ltd	7	0	100.00
Alcon (UK) Ltd	2,357	0	100.00
Alcon (UK) Ltd	50	0	100.00
Alcon (UK) Ltd	1	0	100.00
Alcon (UK) Ltd	119	0	100.00
Alcon (UK) Ltd	5	0	100.00
Alcon (UK) Ltd	7,255	0	100.00
Alcon (UK) Ltd	161	10	94.76
Alcon (UK) Ltd	704	0	100.00
<b>Total</b>	<b>14,246</b>	<b>10</b>	<b>99.93</b>

### Stock service level by patient group

Delivery type	Total order lines	Stock shortage	Service level (%)
Patient home	7,645	0	100.00
Care home	84	0	100.00
Nursing home	3,481	7	99.80
Residential home	3,037	3	99.90
EMI home	10	0	100.00
<b>Total</b>	<b>14,246</b>	<b>10</b>	<b>99.93</b>

10-Feb-2014 11:48:05

Page 1 of 2

Service report		
NHS Supply Chain		
Start date: 01/04/2012		
End date: 06/04/2012		
All districts		
Unsuccessful delivery attempts service level		
Patient home - unsuccessful at first attempt		
Reason	Unsuccessful deliveries	Service level (%)
SPL Issue	3	0.08
Address Not Found	2	0.04
Patient not at home (carded)	82	1.51
Patient not at home (unable to card)	27	0.50
Total	2.10	
Patient home - unsuccessful at second attempt		
Reason	Unsuccessful deliveries	Service level (%)
Incorrect Address Details	3	0.06
Patient deceased	8	0.15
Patient in hospital	6	0.11
Patient not at home (carded)	3	0.06
Patient not at home (unable to card)	6	0.11
Patient refused delivery	11	0.20
Total	0.68	
Residential home - unsuccessful at second attempt		
Reason	Unsuccessful deliveries	Service level (%)
Incorrect Address Details	1	0.05
Total	0.05	

## PCT stock service level report

You must have the *Customer Services* role to access the PCT stock service level report.

This report shows the number of order lines that were logged as a stock shortage as a percentage of the total number of order lines delivered.



NHS Supply Chain

## PCT stock service level report

Start date: 01/04/2012  
End date: 06/04/2012

Report shows number of orders lines which were logged as a stock shortage by the distributor at their first delivery attempt as a percentage of all the lines delivered in the period selected

PCT	Total order lines	Stock shortage	Service level
11-0010 (Hull and Wainwright Local Home Delivery)	263	0	100.00
12-0010 (Hull and Wainwright Local Home Delivery)	161	0	100.00

## Financial reports

You must have the *Enquirer*, *Assessor* or *Customer Services* role to access the financial reports.

The reports in this section all show information relating to the cost of the products supplied as part of the HDS service.

## Summary report

The financial summary report provides an overview of activity within a trust, split by Patient Home, Care Home and Residential Home.

NHS Supply Chain

## Financial summary report

Start date: 01/04/2012  
End date: 06/04/2012

11-0010 NHS Hull and Wainwright Local Home Delivery

	Num pats. rcvd delivery	Num homes rcvd delivery	Num orders delivered	Product count	Product cost	Delivery cost	Service cost	Total cost
<b>Orders</b>								
Patient Home	11	0	22	112	661.81	92.95	16.96	771.72
Care home	0	0	1	0	0.00	50.10	0.00	50.10
Residential home	20	5	40	100	712.29	0.00	17.20	729.49
<b>Total</b>	<b>31</b>	<b>5</b>	<b>63.00</b>	<b>212</b>	<b>1,374.10</b>	<b>143.05</b>	<b>34.16</b>	<b>1,551.31</b>
<b>Grand total</b>	<b>31</b>	<b>5</b>	<b>63.00</b>	<b>212</b>	<b>1,374.10</b>	<b>143.05</b>	<b>34.16</b>	<b>1,551.31</b>

## Financial line detail report

This report contains a lot of information and can be downloaded as compressed (zipped) file. Within the file is a spreadsheet. The example below shows the columns included in the report and some sample information.

	A	B	C	D	E	F	G	H	
1	District	Req Point	Patient Name	Date of Birth	NHS Number	NPC	Description	Prescription Name	Or
2	01	01004C	Ann Brown	16/07/1992	1123333873	ZEZ000H	Delivery Charge	12 Week	00
3	01	01004C	Ann Brown	16/07/1992	1123333873	CFP406H	Shaped pad absorbent	12 Week	00
4	01	010053	John Smith	13/04/1999	1122335566	ZEZ000H	Delivery Charge	12 Week	00
5	01	010053	John Smith	13/04/1999	1122335566	CXN110H	Nappy baby/child Extr	12 Week	00
6	01	010277	Peter Green	13/05/1929	3232323232	CFP406H	Shaped pad absorbent	12 Week	00
7	01	010277	Peter Green	13/05/1929	3232323232	ZEZ000H	Delivery Charge	12 Week	00
8	02	02005C	Sally Smith	18/11/1936	1000000476	ZEZ000H	Delivery Charge	26 Week	00
9	02	02005C	Sally Smith	18/11/1936	1000000476	CFP406H	Shaped pad absorbent	26 Week	00

Description Name	Order No	Pack Price	UOI	Units	Qty Supplied	Total Sales	Financial	Financial	Financial	CCG Name
Week	00171H	4.75	Each	1	1	4.75	1	1	1	2015 NHS Telford
Week	00171H	1.74	Pack	28	12	20.88	1	1	1	2015 NHS Telford
Week	00224H	4.75	Each	1	1	4.75	1	1	1	2015 NHS Telford
Week	00224H	3.4	Pack	24	14	47.6	1	1	1	2015 NHS Telford
Week	00172H	1.74	Pack	28	6	10.44	1	1	1	2015 NHS Telford
Week	00172H	4.75	Each	1	1	4.75	1	1	1	2015 NHS Telford
Week	00450H	4.75	Each	1	1	4.75	1	1	1	2015 NHS Shrops
Week	00450H	1.74	Pack	28	12	20.88	1	1	1	2015 NHS Shrops

ial CCG Name	GP Practice	Nurse Assessor	Care Home Name	Care Home	Service Type	Clinical Condition	Clinical Type	Gender
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Angela Brown		None				Female
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Angela Brown		None				Female
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Barbara Carter		None				Male
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Barbara Carter		None				Male
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Chris Denstone		None				Male
15 NHS Telford and Wrekin CCG	ADAMS MEDICAL PRACTICE	Chris Denstone		None				Male
15 NHS Shropshire CCG	BELL MEDICAL PRACTICE	Debra Ellis		None				Female
15 NHS Shropshire CCG	BELL MEDICAL PRACTICE	Debra Ellis		None				Female

Details in the example above are fictitious.

## Care homes financial report

An overview of spending by care home over defined period of time.

<div> </div> <div> <b>Care home financial report</b> </div> <div> <b>NHS Supply Chain</b> </div>							
<b>Start date:</b> 01/04/2013 <b>End date:</b> 05/04/2013 100015 NHS Shropshire Wrekin and Wrekin CCGs - Care and Home...							
District	Home name	Service	No. patients	Product cost	Delivery cost	Service cost	
10	Aunfield Egh	Residential	5	67.31		4.30	71.61
			5	67.31	50.10	4.30	121.71
10	Croft House						075.00
10	Neville House Egh	Residential	5	98.57		4.30	102.87
			5	98.57	0.00	4.30	102.87
<b>Totals</b>			<b>20</b>	<b>712.29</b>	<b>50.10</b>	<b>17.20</b>	<b>779.59</b>



## Care homes patient spend report

The amount spent on each patient, grouped by care home, is shown. Totals for each care home are also shown, and a grand total for all care homes is shown at the end of the report.

### Care home patient spend report

Start date: 01/04/2013

End date: 05/04/2013

Report for: NHS, District, Wharfedale and Airedale NHS Foundation Trust

Report for: Wharfedale and Airedale NHS Foundation Trust

Patient name	Service	Product cost	Delivery cost	Service cost	Total
Mr. [redacted]	Residential	13.84		0.86	14.70
Mr. [redacted]	Residential	13.15		0.86	14.01
Mr. [redacted]	Residential	17.77		0.86	18.63
Mr. [redacted]	Residential	7.77		0.86	8.63
Mr. [redacted]	Residential	14.78		0.86	15.64
<b>Total</b>		<b>67.31</b>	<b>50.10</b>	<b>4.30</b>	<b>121.71</b>

Report for: Wharfedale and Airedale NHS Foundation Trust

Patient name	Service	Product cost	Delivery cost	Service cost	Total
Mr. [redacted]	Residential	28.99		0.86	29.85

## District spend by GP report

The amount that the district is spending on products from HDS, split by GP practice.

### District spend by GP report

Start date: 01/04/2013


End date: 05/04/2013

Report for: NHS, District, Wharfedale and Airedale NHS Foundation Trust

Practice code	GP name	Patient count	Product cost	Delivery cost	Service cost	Total emergencies	Total emergencies product cost	Total emergencies delivery cost	Total emergencies service cost
01	Wharfedale and Airedale NHS Foundation Trust	1	41.36	0.00	0.86	0	0.00	0.00	0.00
02	Wharfedale and Airedale NHS Foundation Trust	1	88.68	8.45	1.61	0	0.00	0.00	0.00
03	Wharfedale and Airedale NHS Foundation Trust	7	321.80	42.25	9.77	0	0.00	0.00	0.00
04	Wharfedale and Airedale NHS Foundation Trust	1	22.17	0.00	0.86	0	0.00	0.00	0.00
05	Wharfedale and Airedale NHS Foundation Trust	1	23.31	0.00	0.86	0	0.00	0.00	0.00
06	Wharfedale and Airedale NHS Foundation Trust	2	44.98	8.45	2.47	0	0.00	0.00	0.00
07	Wharfedale and Airedale NHS Foundation Trust	10	345.22	8.45	9.35	0	0.00	0.00	0.00
08	Wharfedale and Airedale NHS Foundation Trust	6	428.97	8.45	5.91	0	0.00	0.00	0.00
09	Wharfedale and Airedale NHS Foundation Trust	1	16.25	8.45	1.61	0	0.00	0.00	0.00
10	Wharfedale and Airedale NHS Foundation Trust	1	41.36	8.45	0.86	0	0.00	0.00	0.00
<b>Totals</b>			<b>1,374.10</b>	<b>92.95</b>	<b>34.16</b>	<b>0</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

## District spend by nurse assessor report

The amount that each nurse assessor is spending with the HDS service.

  
 NHS Supply Chain

District spend by nurse assessor report

Start date: 01/04/2013  
End date: 05/04/2013

District	Name	Patient count	Product cost	Delivery cost	Service cost	Total emergencies	Total emergencies product cost	Total emergencies delivery cost	Total emergencies service cost
ZE	ZE/TST CHARITIES & HOSPICES	1	18.29	0.00	0.86	0	0.00	0.00	0.00
ZE	ZE/TST CHARITIES & HOSPICES	1	13.15	0.00	0.86	0	0.00	0.00	0.00
ZE	ZE/TST CHARITIES & HOSPICES	1	93.90	0.00	0.86	0	0.00	0.00	0.00
ZE	ZE/TST CHARITIES & HOSPICES	1	23.31	0.00	0.86	0	0.00	0.00	0.00

## Patient reports

You must have the *Enquirer*, *Assessor* or *Customer Services* role to access the patient reports.

## Pads per day use report

A number of criteria can be specified for this report, as can be seen from the image below.

### Patient pads per day use report

CHARITIES & HOSPICES [TST/ZE]

District	ZE/TST CHARITIES & HOSPICES
GP practice	All GP practices
Nurse assessor	All assessors
Delivery type	All
Pads per day	Greater than or equal to 1
Product count	Greater than or equal to 1
Patient status	Active & suspended
Date of Birth	<input type="text"/> to <input type="text"/>

Individual patients are named on the report that is produced.

## Patient reassessment report

Patients have to be reassessed regularly. The **Patient reassessment report** enables staff to identify those patients whose reassessment is due between a specified date range.

The screenshot shows the 'Home delivery' section of the NHS Supply Chain website. The top navigation bar includes links for Patients, Orders, Prescriptions, Catalogue, Directory, Reports, and Delivery. The user is logged in as Mrs Clarissa Susan Peck. The main heading is 'Patient reassessment report' with a sub-link for 'CHARITIES & HOSPICES [TST/ZE]'. Below this is a form with several dropdown menus and date pickers. At the bottom of the form are three buttons: 'View', 'Export', and 'Print reassessment forms'.

District	All districts
GP practice	All GP Practices
Nurse assessor	All assessors
Delivery type	All
Patient status	Active & suspended
Date of Birth	<input type="text"/> to <input type="text"/>
Reassessment date	<input type="text"/> to <input type="text"/>

View Export Print reassessment forms

A list of patients due for reassessment is produced if either the View (seen on screen as a PDF) or **Export** (to Excel) options are selected.

The option is also available to **Print reassessment forms**, which are displayed initially as a PDF document with each patient starting on a new page. A patient reassessment form is shown below.

**Delivery instructions** and the **Additional information** entered in the **Delivery instructions** section of the patient's record (see page 36) are shown in the **Delivery instructions** section of the report, separated using a dash. Any access code recorded in the record is not included.

## Patient Reassessment Report

**NHS**  
NHS Supply Chain

JB NHS LIVERPOOL CCG

### Current patient information

Surname	Forename
Title	Gender <input checked="" type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/>
Date Of Birth	Delivery type <input checked="" type="checkbox"/> Home Delivery <input type="checkbox"/> Care Home <input type="checkbox"/>
Status	NHS number
GP Practice	Contact number
Nurse Assessor	Delivery day
Last Review Date	Last delivery
	Next delivery

### Delivery address

House no. Address line 1 Address line 2 Town Postcode

### Alternate delivery address

House no. Address line 1 Address line 2 Town Postcode

### Delivery instructions

Knock loudly because he is very deaf

### Patient clinical information

Ethnic group	Not known	Next of kin name
Language	Not Known	Next of kin no.
Interpreter reqd	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	

### Clinical information

Clinical type	Enuresis	Clinical condition	Nocturnal enuresis
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### Patient prescription

NPC	Description	UOI	Units	Price	Qty Required Pads/day	Packs	Cycle length	Prescription type	Last delivery date
VMU022H	Underpads Virgin Fluff Pulp 4way Sealed 60 x 60cm Plus PE Back Sheet Attends Cover Dri 203634	Pack	50	4.91	2	6	20 Wk	Callback	15-Oct-2008

Changes to be made

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print name \_\_\_\_\_ PIN \_\_\_\_\_

Office use only

## Patient status report

An overview of the patients currently being managed by a trust using the HDS application is provided in the [Patient status report](#).

**NHS**  
NHS Supply Chain

### Patient status report

WIMHS: Routes, Wards, and Cases - NHS Supply Chain

Status	Gender	Delivery type	Age	Overdue assessment
Active: 303	Male: 124	Own Home: 344	4 and below: 2	204
Discharged: 234	Female: 279	Care Home: 0	5 - 18: 42	
Deceased: 99		Residential: 40	17 - 64: 56	
Suspended: 10		Worship: 0	65+: 363	
		EMR: 0	Unknown: 0	

Note: The Delivery type and Overdue assessment fields only refer to active patients, whilst the Gender and Age fields apply to active and suspended patients

Prescriptions	Callback: 409	Automatic: 71
---------------	---------------	---------------

Clinical type	Patients active or suspended	Clinical condition	Patients active or suspended
Not known	403	Not known	403

### Patients on service

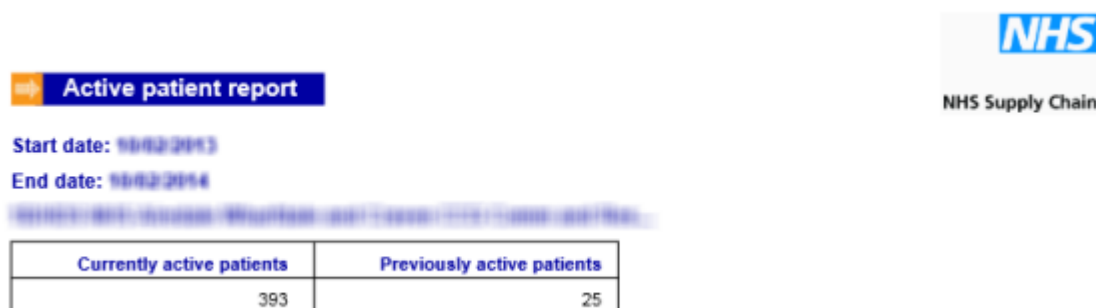
This report can only be exported as a spreadsheet. It provides all patients' demographic details, including NHS number, contact details, GP practice, associated CCG and so on. Where applicable, the care home service type (nursing, residential, EMI) is specified.

It also includes details of the assessor, prescription information, the patient's clinical condition, clinical type, the last order date and any delivery instructions.

### Active patients

Shows the number of currently and previously active patients for the selected trust.

Previously active patients are those that are currently inactive but who have been active in the last 12 months.



The screenshot shows the 'Active patient report' interface. It includes the NHS logo and 'NHS Supply Chain' text. Below the title, there are fields for 'Start date: 10/02/2013' and 'End date: 10/02/2014'. A table displays the patient counts:

Currently active patients	Previously active patients
393	25

### Patient removal report

Depending on your trust's requirements, patients can be automatically suspended or removed following a defined period of inactivity. This suspension or removal happens overnight, and this report provides a list of the affected patients.

The report shows the district, the patient's name, a contact number (if any), the patient's date of birth, NHS number, status (whether discharged or suspended), who suspended or discharged (the username of a person, or SYSTEM if done automatically) and the date this happened.

The report is available in PDF format or can be exported to Excel. The example below is a single page of the report – all the information it contains is fictitious.

**Patient removal report**



Date from: 01/01/2015  
Date to: 13/10/2015  
District: All Districts

District	Patient name	Contact number	DOB	NHS number	Status	Actioned by	Actioned date
21	Mary Hughes		08/02/2008		Suspended	SYSTEM	11/08/2015
21	Matilda Smith		03/09/2008		Suspended	SYSTEM	11/08/2015
21	Patient Test		01/02/2008		Suspended	SYSTEM	11/08/2015
21	Paul Smith		28/02/1964		Suspended	SYSTEM	11/08/2015
21	Rosaleen Clarke		01/01/2011		Discharged	LFMARTIN	04/08/2015
21	Sarah Brambley	01478523698	09/06/1943		Suspended	CTATALIA	21/09/2015
21	Sarah Hilligt	098765432	01/01/2008		Suspended	SYSTEM	11/08/2015
21	Sarah Meinert		05/05/1984		Suspended	SYSTEM	11/08/2015
21	Sarah Whitely		09/11/1981		Suspended	SYSTEM	11/08/2015
21	Smith John	01270 68975	12/02/1982		Suspended	SYSTEM	11/08/2015
21	Wilbourne Mandy		13/10/1969		Suspended	SYSTEM	11/08/2015
21	William Frank Jackson	01244 532096	10/10/1919		Suspended	SYSTEM	11/08/2015
21	William Taylor		08/05/1950		Suspended	SYSTEM	11/08/2015

13-Oct-2015 14:37:43

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## Delivery reports

You need the *HDS Customer Services* role to access the delivery reports.

Delivery offers a dropdown option of reports.

The screenshot shows the 'Home delivery' interface of the NHS Supply Chain. The top navigation bar includes 'Patients', 'Orders', 'Prescriptions', 'Catalogue', 'Directory', 'Reports', and 'Delivery'. The 'Delivery' menu is open, showing a dropdown list with options: 'Distribution >', 'Reports', 'Failed delivery attempts', 'Failed orders', 'Stock short orders', 'Stock short status changes', 'Order rejections', and 'Collections'. The 'Reports' option is currently selected. The main content area displays 'Welcome' and 'You are now accessing the Home delivery service from NHS Supply Chain'. Below this, there is a 'Trust selection' dropdown menu set to 'ZE/TST CHARITIES & HOSPICES'. To the right, there is a 'Currently:' section with a 'Connect' button and a 'HDS assessor' field. At the bottom, there is a 'Distributor information' section with a 'HDS enquirer' field and a 'Financial limit of £0'.

## Failed delivery attempts

Failed delivery attempts for one or all delivery routes within a date range.

## Failed delivery attempts report

Patient	Post code	Contact no.	Order no	MPC	NPC	Units	Line quantity	Reason	Comments	Delivery date	New date
Waller Thomas Cole	WV12 8PC		2001100701	4038	CXND0001	12	21	3PL Issue		10/02/14	
Nappy pull on baby/child Large white 35-60kg											
Mrs. Norman Singh	W12 8TP	0181 885 7275	1001001001	5477	CXND0001	21	16	Patient not at home (car		10/02/14	
Nappy baby/child Comfort 7 extra large plus breathable providing improved absorbency and softness 15-30kg (33-66lbs)											
Wage Mary Carter	LS19 7EL	01754 840771	10000001	4038	CXND0001	12	10	Patient not at home (car		10/02/14	
Nappy pull on baby/child Large white 35-60kg											

These prescriptions have had at least one failed delivery attempt but could still be delivered and show a new delivery date that the distributor has entered.

## Failed orders

Details of orders where delivery has failed.

## Home Delivery Service

### Customer Services Failed Delivery Report

DistOrder No	ReqPoint	MPC	NPC	Description	Patient Name	Reason	Req. qty	Del. qty	Unit Val	Line Val	Del date	New del date
151 2100001	1100001	1000001	CXND0001	Belt product for moderate to heavy incontinence D16	John Cunningham	Patient refused delivery	12	0	12.14	145.68	02/01/14	
62 1100001	6200001	10000001	CXND0001	All-in-one pads absorbency band D21	Steve Bull	Patient not at home (unable to card)	12	0	14.51	174.12	02/01/14	07/01/14
47 2000001	4700001	01000001	CXND0001	Nappy baby/child	George Pratt	Patient not at home (carded)	17	0	5.27	89.59	02/01/14	07/01/14
34 0000001	3400001	7000001	CXND0001	Shaped pad absorbency band I8	James MacArthur	Patient not at home (unable to card)	12	0	3.42	41.04	02/01/14	07/01/14
35 0100001	3500001	7000001	CXND0001	Shaped pad absorbency band I9	James MacArthur	Patient deceased	2	0	5.38	10.76	02/01/14	

These prescriptions have now failed to be delivered at least twice and cannot now be fulfilled. All future prescriptions for these patients will be held until they are amended and validated.

## Stock short orders

This is a list of the orders for which there is a full or partial stock shortage awaiting stock to come in so that the order may then be fulfilled.

## Stock short status changes

This report reflects the changes to stock shortages that were made within the specified date range, including rebooked delivery dates.

## Home Delivery Service

### Customer Services Stock Shortage Report

Order number	Patient name	Care home contact	NPC	Quantity delivered	Qty stock short	Requested del date	Est restock date	Rebooked date
17630001	Charlie Wingham		CXND0001	13	2	10/02/2014		
24034001	Philip Garrett		CXND0001	0	24	10/02/2014	11/02/2014	
10000001	Louise Clayforth		CXND0001	0	4	10/02/2014	11/02/2014	
10000001	Charles Newell		CXND0001	0	24	10/02/2014	11/02/2014	

## Order rejections

This report is created from a list of products that cannot be supplied by the distributor



because the NPC is unknown.

## Home Delivery Service

### Customer Services Rejected Order Report



NHS Supply Chain

Order No	NPC	Patient Name	ImportFailedReason	Del date
194000029		Jack Wenden		13/01/2014 00:00
194000719		Wanda Petherly RFP		14/01/2014 00:00
194001139		Brenda Wright		22/01/2014 00:00
194001162		Aime Frost		24/01/2014 00:00
194001169		Chusan Tassell		28/01/2014 00:00

## Collections

For this report, you can specify collection status and collection route as well as a date range and a district.

## Home Delivery Service

### Collections



NHS Supply Chain

District	Collection reference	Name	Delivery Postcode	Collection Reason	Coll orderNPC reference	Req. qty	Collection date	Collection status	Coll. qty	Cred. qty	Credit date	Credit amount
08	CO0272	Rebecca Kaur	TF3 1TU	Prod. not approp. for pat.	43043H CFP238H	9	14/01/13	Collection Fi	0	0		0.00
08	CO0273	TRACEY HINCOCK	TF4 2EH	Prod. not approp. for pat.	43043H CFP238H	14	14/01/13	Credited	0	13	04/02/13	120.77
08	CO0274	JAMES ASTERLEY	TF1 3NQ	Patient Deceased	43043H CFP238H	3	21/01/13	Credited	0	0	11/02/13	0.00
08	CO0274	JAMES ASTERLEY	TF1 3NQ	Patient Deceased	43043H CFP238H	4	21/01/13	Credited	0	4	11/02/13	21.04