



Accessing and Using Dashboards, Pre-built Reports & Quick Search



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# **Accessing the Dashboards**

The system provides easy-to-use analysis, reports and dashboards, supporting patient safety, improving patient outcomes and medicines optimisation. Data contained within the system includes dashboards supporting the Medicine Value Programme such as:

- Medicines Safety
- Medicines Optimisation: Polypharmacy
- Antimicrobial Stewardship
- Medicines Optimisation: Generic Prescribing
- Items which should not be routinely prescribed in primary care
- Electronic Prescribing Service Utilisation
- Volume & Cost
- Respiratory Prescribing

Detailed information and specifications of the dashboards are listed here: <u>https://www.nhsbsa.nhs.uk/epact2/epact2-dashboardsspecifications</u>

			Home Catalog Favorites	pen 🔹 🙁
				¢ 0
	Welcome to e	PACT2		Í
News	Dashboards	Prescribing Reports	Quick Search	
NEWS FEED		MY FOLDERS	PACT2 LATEST DATA	
NEW 22 March 2023 ► Carbon Impact dashboard upo We've been working on some improvements and the com have now been reisstand as below:	iate parators for preventer prescribing in the Carbon Impact dashboard	My Folders	Prescription Data: Feb-23	
Prescribing of low carbon preventer inhalers as a propo     Prescribing of very high carbon preventer inhalers as a	tion of all preventer inhaler prescribing proportion of all preventer prescribing	Arry Clifford     Archive	Remuneration Report: Jan-23	11

To access the dashboards from the Landing page select the 'Dashboards' icon:

You will then navigate to the dashboard page which will display all available dashboards, from here select the blue link for the dashboards you wish to view.

ePACT2 Dashboards				
News	Dashboards	Prescribing Reports	Quick Search	
Clinical Dashboards Alers Dashboard Antimicrobial Stewardship - Children Antimicrobial Stewardship - RightCare UTI Focus Pack Children's Standard Liquid Concentration Diabetes Prescribing Comparators Medication Safety Indicators Mediation Safety Indicators Menal Health Prescribing Comparators (Snapshot) Opioid Prescribing Comparators (Snapshot) Opioid Prescribing Comparators (Snapshot) Opioid Prescribing Comparators (Snapshot) Respiratory - Carbon Impact Safer Management of Controlled Drugs	Medicines Value Programme Dashboards Evidence Based Interventions Items not for Routine Prescribing Medicines Optimisation Over the Counter Medicines (OTC) Potential Generic Savings - (2021/22-33 Oct-Dec) Potential Generic Savings - (2021/22-34 Jan-Mar) Potential Generic Savings - (2022/23-31 Apr-Jun) Potential Generic Savings - (2022/23-02 Jul-Sep) Premium Priced Generics	EPS and eRD Utilis EPS and eRD Utilisatio Volume & Cost Das Volume & Cost Out of Area Dispensing Out of Area Dispensing	ation Dashboard Dashboard hboard sing	

### **Navigating the System**

If you wish to navigate back to the landing page after you have viewed other ePACT2 content:

1. From the 'ePACT2' toolbar select 'Dashboards'.



2. From the available list select 'Menu' and 'ePACT2'.



3. Alternatively, use the breadcrumb trail at the bottom of any page by selecting 'ePACT2: 01News'.



# **Navigating the Dashboards**

All dashboards provided by the NHSBSA operate in a similar way. For the purposes of this guide, the 'Polypharmacy Prescribing Comparators' dashboard will be used, however, the functionality is uniform across the dashboards.

### Selecting a dashboard page

1. You may need to use the scroll bar to view the entire dashboard.



- 2. A selection of links will be available to allow you to navigate across different organisation levels of the dashboard. Select the link for the area of the dashboard you would like to view.
- 3. You can then choose between different sub-tabs.



4. The dashboard will then generate according to the options selected.

#### **Dashboard Criteria Selection**

 The Dashboards have a range of criteria options to allow you to select the data you want the dashboard to show. The options available to select will change depending on the dashboard you are viewing.

Polypharmacy Prescribing Comparators	
SICBL         PCN         Practice         Datasets         Supporting Information           SICBL in National         SICBL in Region         SICBL in AHSN         SICBL in ICB         SICBL in Similar 10	
* Comparator Average number of unique medicines per patient	•
* Age Band All Ages 🔹 * Period Feb-23 👻 * SICBL	•

All dashboards will default to show the latest time period available and the organisation the user is registered under. National users will default to the first organisation alphabetically.

- 2. Select the drop-down arrow to the right of the criteria that you would like to update.
- 3. Click on the option you want to view from the list.

Polypharmacy Prescribing Comparators
SICBL PCN Practice Datasets Supporting Information
SICBL in National SICBL in Region SICBL in AHSN SICBL in ICB SICBL in Similar 10
* Comparator Average number of unique medicines per patient
* Age Band Al 🖋 Average number of unique medicines per patient
Multiple prescribing of anticoagulants and antiplatelet medicine
Percentage of patients prescribed 8 or more unique medicines
Percentage of patients prescribed 10 or more unique medicines
Percentage of patients prescribed 15 or more unique medicines
Percentage of patients prescribed 20 or more unique medicines
Search

4. Once selected the dashboard will automatically update and display the required data.

#### **Data Views**

Some reports contained within the dashboard will be available in both 'Chart' and 'Data' formats.



- 1. Select the drop down option for the 'Display'.
- 2. The views available will be displayed to select.

# **Exporting and Printing the Data**

### **Exporting Dashboard Page**

Polypharmacy Prescribing Comparators	Home Catalog Favorites	🔹 Dashboards 🔻 Create 👻 Open 👻 😔
SICBL         PCN         Practice         Datasets         Supporting Information           SICBL in National         SICBL in Region         SICBL in AHSN         SICBL in ICB         SICBL in Similar 10		✓ Edit Dashboard
* Comparator Average number of unique medicines per patient * Age Band All Ages	Export Current Page	Berrort to Excel     Create Bookmark Link
Average number of unique medicines per patient - All Ages highlighted within results for all SICBLs during Feb-23 <u>Numerator Definition</u> Display:- Chart		Create Prompted Link Apply Saved Customization Save Current Customization
4.50 4.20 5 3.90 0 1 3.60	4.0	Edit Saved Customizations Clear My Customization

- 1. Select the 'cog' icon in the upper right hand corner.
- 2. From the drop-down list select the option to 'Export to Excel'.
- 3. Select 'Export Current Page'.

#### **Exporting Individual Reports**

1. Select the 'Export' option below the report required.



- 2. A drop-down list with the formats available to export in will be displayed.
- 3. Select the format required from the list presented.



#### **Printing**

- 1. Select the 'Print' option below the report required.
- 2. Select the format required from the drop-down list presented.



# **Accessing the Pre-built Reports**

The pre-built 'Prescribing Reports' are available in two different formats. 'Standard reports' are available which allow users to access data for a specific prescribing area. There are also 'Report Templates' which allow users to set a more specific, narrowed criteria for the data.

1. From the Landing page select 'Prescribing Reports'

	Welcome	to ePACT2	
News	Dashboards	Prescribing Reports	Quick Search
NEWS FEED		MY FOL	ePACT2 LATEST DATA

2. You will then be taken to the 'Prescribing Reports' section, all reports are accessed by expanding the report category and selecting the link for the report you wish to view.

	ePACT2 Pre	scribing Reports	
News	Dashboards	Prescribing Reports	Quick Search
Key reports	Prescribing Monitoring	Controlled Drug Reports	
Invoice Reconciliation Reports	Prescribing Comparators	Controlled Drug Comparators	Common Information Reports
Cost Comparators	Prescribing Information	Controlled Drug Monitoring	▶ MOKTT
Organisation & Demographic Information	Prescribing Cost Analysis Drug Table 1 - Monthly Drug Table 1 - Quarterly Drug Table 1 - Annually Drug Table 2 - Monthly Drug Table 2 - Quarterly Drug Table 2 - Quarterly	2	Advanced Service Flu Report - Pharmacy Contractors
	Drug Table 2 - Annually Drug File Download (PR1) SVM Drug File Download (PR2) Chemist Table C20 - National (PR7) Chemist Table C20 - Regional (PR7) Exemption Category Data (PR9)		
	Volume Comparators		

#### **Using a Standard Report**

The 'Standard Reports' are visually similar to the dashboard reports, in style and layout and are made up of several tabs/pages, that can be accessed in the same manner as the dashboard reports.

- 1. Once you have selected a report, select the main Tab/Page you wish to view.
- 2. Then select the Sub-tab.

Potential Generic Savings				Home	Catalog
National         ICB         Commissioner/Provider         Practice         F           Commissioner/Provider - Quarterly         Commissioner/Provider - Quarterly         Commissioner/Provider         F	Practices within a Commission	er/Provider Supporting Information	1		
	* QUARTER	ICB	* COMMISSIONER/PROVIDER		
	Jan - Mar 23 (2 Months) 🔻	NOT THE REPORT OWNER AND		oly Rese	t 🕶
PG1(C1). Potential Generic Savings Total cost of all drugs prescribed in Tell Tell	RTH CAST AND YOR	11-0.00RA-CB-157(157)	in Jan - Mar 23 (2 Months)		
		Net in	gredient cost (£)		
			12,994,159.85		

- 3. The 'Criteria Selection' can then be used to restrict the report to your chosen criteria.
- 4. Select 'Apply' to update the report to return the data for the relevant changes made.

Potential Generic Savings	Home Catalog
National ICB Commissioner/Provider Practice Practices within a Commissioner/Provider Supporting Information	
Commissioner/Provider - Quarterly Commissioner/Provider - Monthly	
QUARTER ICB *CC	MMISSIONER/PROVIDER
Jan - Mar 23 (2 Months) V	Apply Reset
PG1(C1). Potential Generic Savings	lan - Mar 23 (2 Months)
Net ingredi	ent cost (£)
	2,994,159.85

5. The report will now return the data for the criteria selected, and beneath each of the views in the report there are the options to 'Export' or 'Print' the data from the report.

Potential Generic Savings				Home	Catalog
National         ICB         Commissioner/Provider         Practice           Commissioner/Provider         Quarterly         Commissioner/Provider         Commissioner/Provider	Practices within a Commission	er/Provider Supporting Information			
PG1(C1). Potential Generic Savings Total cost of all drugs prescribed in	* QUARTER Jan - Mar 23 (2 Months) 🔻	ice Ten bolivasi varifiklari sov	* COMMISSIONER/PROVIDER	Apply Rese	: •
		Net ing	gredient cost (£) 12,994,159.85		
		2	Print - Export		

#### **Using a Report Template**

The 'Report Templates' are the second type of prescribing reports within the system. These reports will be found within the 'Key Reports' category in the 'Prescribing Reports' section of the system.

When you open a report, you will be prompted with the report criteria pane. In this
pane you must select the criteria you want the report to run for. N.B. – if these
prompts/drop-down lists have an '\*' (asterisk) then these will require a selection in
order for the report to return the data.

ePACT2	2		3	Home
* Month Feb-23 V	* Commissioner / Provider plus Code	BNF Chapter plus Code	Select Value	•
	* Practice plus Code	BNF Section plus Code	Select Value	•
		BNF Paragraph plus Code	Select Value	•
		BNF Sub Paragraph plus Code	Select Value	•
		BNF Chemical Substance plus Code	Select Value	•
		BNF Product plus Code	Select Value	•
		BNF Presentation plus Code	Select Value	•
				OK Reset 🕶
Edit - Refresh				

1)	Month	Enables you to select a time period by using the drop-down option
2)	Organisation	Enables you to select an organisation via the drop-down option
3)	BNF	Enables you to select something from the BNF via the drop-down option

2. Once the criteria has been selected then click 'OK' to generate the report:

● ePACT2		Home
	7	
* Month Feb-23	BNF Chapter plus Code	Select Value
* Practice plus Code	BNF Section plus Code	Select Value
	BNF Paragraph plus Code	Select Value
	BNF Sub Paragraph plus Code	Select Value
	BNF Chemical Substance plus Code	Select Value
	BNF Product plus Code	Select Value
	BNF Presentation plus Code	Select Value
		OK Reset ▼
Edit - Refresh		

3. After the report has been run with the selected criteria, then a table of data will be returned based on the criteria selected.

# **Editing a Pre-built Report**

#### **Editing and Saving a report**

If you wish to edit the information returned within a 'Report Template' report it is possible to edit the report.

The edited version can then be saved to your 'My Folders' to be accessed.

Editing a Pre-built report will not affect the version saved within the system; the changes will only affect the version saved within the users 'My Folders'.

#### 1. From the Landing page select 'Prescribing Reports'



2. Select the report you wish to view by selecting the blue link of the report.

ePACT2 Prescribing Reports						
News	Dashboards	Prescribing Reports	Quick Search			
⊿ Key reports	Prescribing Monitoring	Controlled Drug Reports	Hospital Trust Reports			
BNF Codes and Names (P2) Budget Report (P1)	Prescribing Comparators	Controlled Drug Comparators	Common Information Reports			
Dispensing Doctors (P3)	Prescribing Information	Controlled Drug Monitoring	▶ MOKTT			
High Cost Drugs (Practice Level) (P5p) High Cost Drugs (Prescriber Level) (P5e)	Prescribing Cost Analysis		Advanced Service Flu Report - Pharmacy			
Prescriber - Dispenser (P4)	Volume Comparators		Contractors			
Special Order Items (P7)						
Top 50 Paragraphs by Cost Prescriber (P10)						
Top 50 Paragraphs by Items Prescriber (P11)						
Invoice Reconciliation Reports						
Cost Comparators						
Organisation & Demographic Information						

3. From the criteria pane select 'Edit'.

ePACT2			Hom
* Month Feb-23 🔹	* Commissioner / Provider plus Code	BNF Chapter plus Code	Select Value
	* Practice plus Code	BNF Section plus Code	Select Value
		BNF Paragraph plus Code	Select Value
		BNF Sub Paragraph plus Code	Select Value
		BNF Chemical Substance plus Code	Select Value
		BNF Product plus Code	Select Value
		BNF Presentation plus Code	Select Value
Edit Defreeb			OK Reset ▼
3			

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- 4. With the 'Criteria' tab selected in the analysis builder, make any required changes.
- 5. Once any changes have been made select 'Save As' to save the updated copy of the report.

<ul> <li>High Cost Drugs Report (Pra</li> </ul>	actice Level)	Home Catalog Favo	rites • Dashboards • Create • Open • 🜘
Criteria Results Prompts Advance	ed		
<b>↓ 4</b>	T Z m		<u>\</u> 5
30 ePACT 2     Time Period	∡ Selected Columns		⊙ ¥
Organisation	England Prescribing Organisations	Drug / Appliance	Reporting Fields
Drug / Appliance     Reporting Fields	Practice 🧔 🚦 Practice Code 🧔	BNF Presentation 🔅 🚦 BNF Pres	sentation Code 🕸 🚺 1 Actual Cost (£) per Item i
Patient			
	4		
∡ Catalog 💿 🐘 🖉 🤧	⊿ Filters		<b>™</b> × ≫

- 6. Select the folder you want to save the report to.
- 7. Name the report appropriately.
- 8. Select 'Ok' to save the report.



Users are only able to save content to their 'My Folder' or a sub folder under this, if another folder is selected an error message will be returned.

#### Accessing an updated report

1. From the 'Landing' page select the hyperlink for the report within the 'My Folders' section.

更 ePACT2			Home Catalog Favorites 🕶 Dashboards 🕶 Create 🕶 Open 👻 🧕
			¢ 0
	Welcome to e	PACT2	ĺ
News	Dashboards	Prescribing Reports	Quick Search
NEWS FEED		MY FOLDERS	ePACT2 LATEST DATA
NEW 22 March 2023 ► Carbon Impact dashboard upda We've been working on some improvements and the comp	te arators for preventer prescribing in the Carbon Impact dashboard	My Folders	Prescription Data: Feb-23
have now been reinstated as below:		High Cost Drugs Repo	rt (Practice Level) Remuneration Report: Jan-23

# **Using Quick Search**

The Quick Search analysis is a standard report template and can be found via the landing page.

The report will allow you to quickly return data for a preset selection of fields. The report will be generated for any organisation or BNF level selected by you in the analysis prompts.

The additional benefit of the Quick Search is that you can see the BNF Hierarchy structure when selecting your products.

1. From the 'Landing page' select 'Quick Search'.



2. The 'Quick Search' will then open in a new tab, and you will be presented with the 'Quick Search' criteria pane.

1			2		3
Month Feb-23	•	Prescribing Organisation		O BNF - Hierarchy	୍
Edit - Refresh					OK Reset ▼

1) Month	Select the time period you want the report to run for
2) Organisation	Select the organisation you want the report to run for
3) BNF	Select something from the BNF you want the report to run for

#### **Completing the Quick Search criteria**

The time period selected will default to the latest month held in the system.

- 1. To view a different time period, select the drop-down arrow for the time period.
- 2. Select the time period you require.



3. Select the magnifying glass icon next to the 'Prescribing Organisation' box.

Prescribing Organisation		0
	3	

4. Select the magnifying glass icon at the top of the 'Choose Members' box, this will bring up the search function.



5. Type your organisation name into the 'Name' box and untick 'Match Case'.

Choose	Choose Members							
Availab	ble			ৎ				
Name S	Starts	•	Newcastle					
	Children of	Root		▼ <sup>1</sup> 1				
	At Level	<any></any>		•				
			Se	earch Match Case				

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6. Select the drop down arrow of the 'At Level' box and select the organisation level you wish to search at.



CCG's, Hospital Trusts and ISHP's are held at Commissioner/Provider level. Selecting your organisation level will ensure your results are returned quicker, as the system is only looking for your organisation in this level.

7. Select 'Search' to search for your organisation.

Choose Members						
Availa	ble				Q,	
Name	Starts	•	Newcast	lle		
	Children of	Root		•	T	
	At Level	Commiss	ioner / Pro	ovider Level 🔹	,	
			7	Search Match C	ase	

- 8. Click on your organisation.
- 9. Select the single arrow icon.

Choos	se Members	5					
Availa	ble					Q,	
Name	Starts	•	Newcast	le			
	Children of	Root			•	T	
	At Level	Commiss	ioner / Pr	ovider Lev	vel 🔹	,	
				Search	Match (	Case	9
⊿ Co	olumn Valu	es		(	8		> [m
•	NEWCAS	TLE CITY	COUNCI	L (1070 <mark>0</mark>	h		»
►	NEWCAS	TLE NORT	TH AND E		(00) (0	01-	
►	NEWCAS	TLE WEST	r ccg (00	0H00) (C	01-Apr-15)		<
•	NEWCAS	TLE (5D70	00) (C 01-	Jan-14)			~

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10. Select 'OK'.





11. Select the magnifying glass for the 'BNF – Hierarchy' box.



12. Select the magnifying glass icon to bring up the search function.

Choose Members							
Available							
	Name Starts		T	E.			
		Children of	Root 🗸	77.			
		At Level	<any></any>				

13. Type the name of the drug you are searching for, in this example it is Tramadol.

14. Change the 'At Level' to the level you want to search the BNF for, in this example it is Chemical substance.





If you do not know the level of the product you are searching for, by leaving the 'At Level' box as 'Any' this will bring back every level of the BNF that contains the name of the drug you are searching for.

15. Untick 'Match Case' and click 'Search'.

Choose Members									
Availa	ble			ৎ					
Name	Name Starts								
	Children of	Root		▼ 5.					
	At Level	BNF Chemical Substance							
				Search Match Case					

- 16. Click on the item you want, in this example it is 'Tramadol Hydrochloride (040702040)'
- 17. Select the single arrow, to move the item to 'Selected'.

Choos	e Members	5					
Availa	ble					Q,	
Name	Starts	•	Tramado	ol			
	Children of	Root 💌 🐛				T	
	At Level	BNF Chemical Substance			,	1	
				Search	Match (	Case	Y
	olumn Valu	es					> 💊
1	Tramadol	hydrochlor	ride (0407	02040)			»

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18. Click on OK



19. Select OK, to run the analysis with the selected criteria

Month Feb-23	•	Prescribing Organisation	NENCASTLE GATERHEAB CHIPS I (RINAGO		O BNF - Hierarchy		Tramadol hydrochloride (040702040)		o,	
								ок	Reset	•
Edit - Refresh								- {	$\gamma$	

## **Getting more help**



#### Additional training material and user guides

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our <u>ePACT2 user guides page</u>

#### Webinar sessions

We offer a free webinar training service to all our users and you can book as many sessions as you need.

Our webinar sessions are booked as 1hour slots and we offer a number of different sessions covering a range of topics.

We also offer bespoke sessions which are delivered just to you or your invited colleagues. You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour of the system.

Our experienced trainers deliver these sessions using MS Teams and you can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our ePACT2 training page