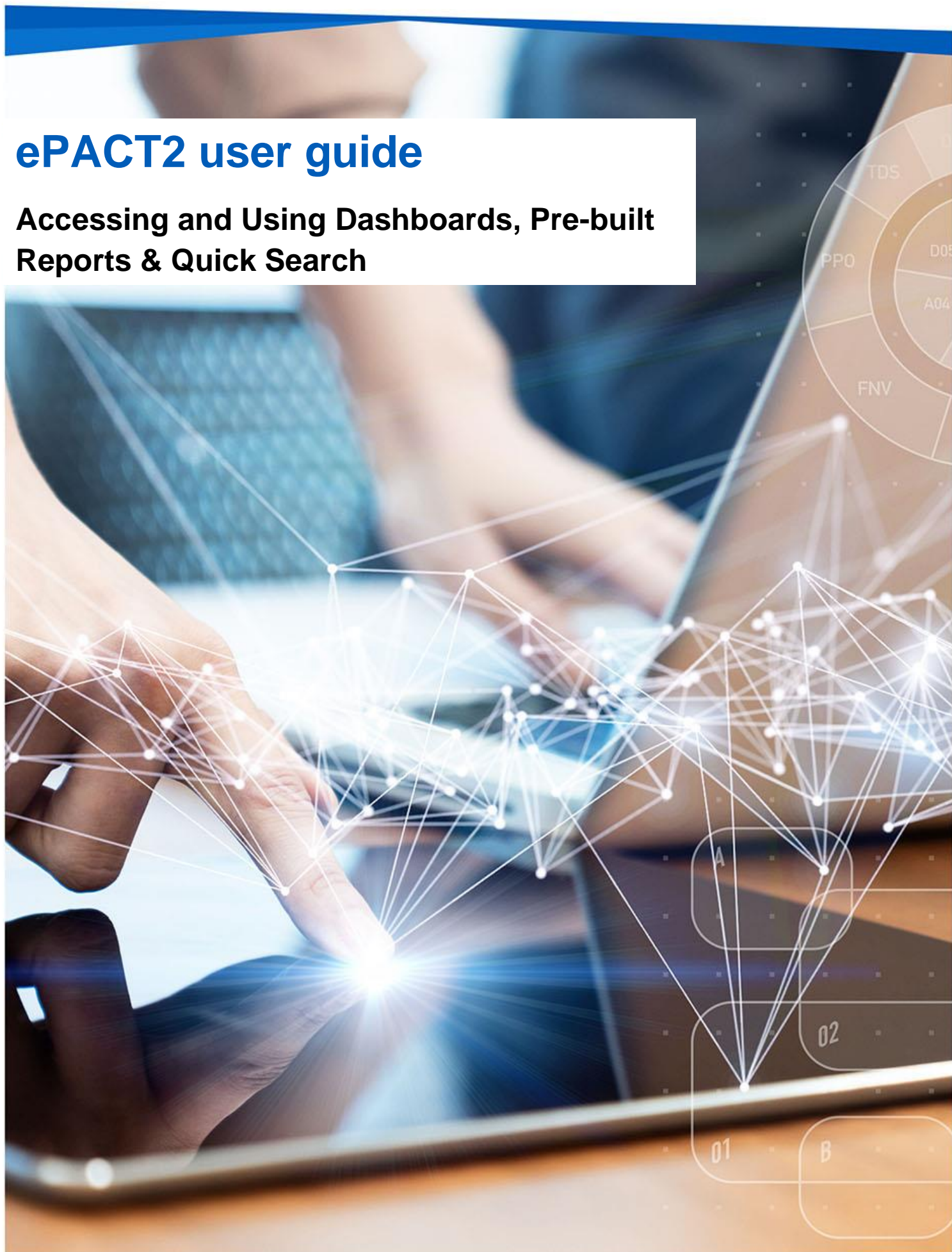


ePACT2 user guide

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



Interactive Contents

Use this interactive contents list to jump straight to the content you want to see. Just click the titles below to go directly to that section:

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[Accessing an updated report](#)

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Getting more help

Accessing the Dashboards

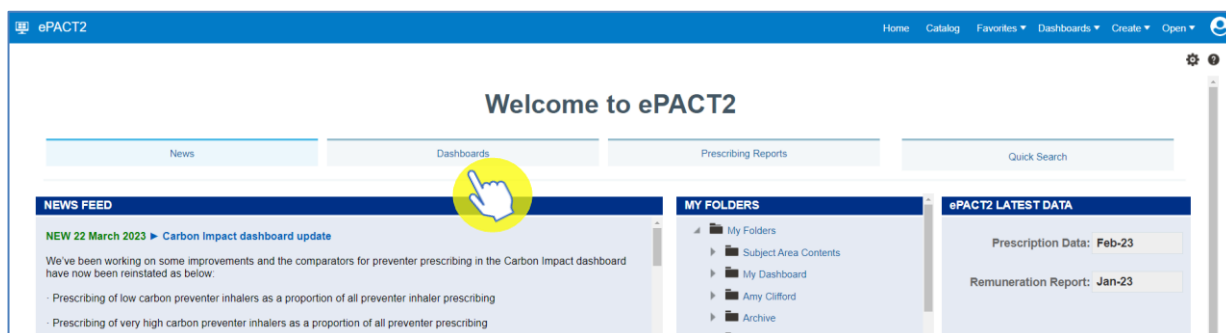
The system provides easy-to-use analysis, reports and dashboards, supporting patient safety, improving patient outcomes and medicines optimisation. Data contained within the system includes dashboards supporting the Medicine Value Programme such as:

- 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:

<https://www.nhsbsa.nhs.uk/epact2/epact2-dashboards specifications>

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.

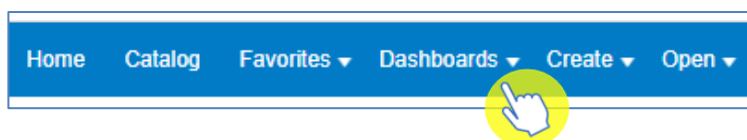
ePACT2 Dashboards

News	Dashboards	Prescribing Reports	Quick Search
Clinical Dashboards Alerts Dashboard Antimicrobial Stewardship Antimicrobial Stewardship - Children Antimicrobial Stewardship - RightCare UTI Focus Pack Children's Standard Liquid Concentration Diabetes Prescribing Comparators Medication Safety Indicators Mental Health Prescribing Comparators Opioid Prescribing Comparators (Snapshot) Opioid Prescribing Comparators (Trend) Polypharmacy Prescribing Comparators Respiratory Respiratory - Carbon Impact Safer Management of Controlled Drugs Valproate Prescribing in Female Patients Under 55	Medicines Value Programme Dashboards Evidence Based Interventions Items not for Routine Prescribing Medicines Optimisation Over the Counter Medicines (OTC) Potential Generic Savings - (2021/22-Q3 Oct-Dec) Potential Generic Savings - (2021/22-Q4 Jan-Mar) Potential Generic Savings - (2022/23-Q1 Apr-Jun) Potential Generic Savings - (2022/23-Q2 Jul-Sep) Premium Priced Generics	EPS and eRD Utilisation Dashboard EPS and eRD Utilisation Dashboard Volume & Cost Dashboard Volume & Cost Out of Area Dispensing Out of Area Dispensing	

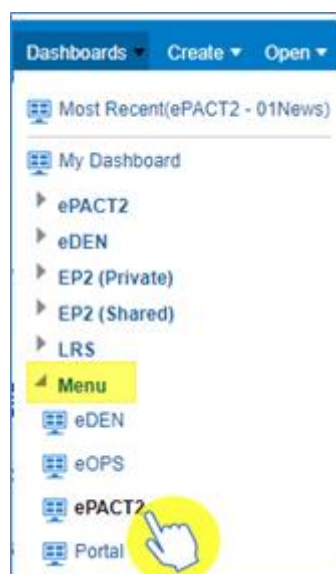
Navigating the System

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

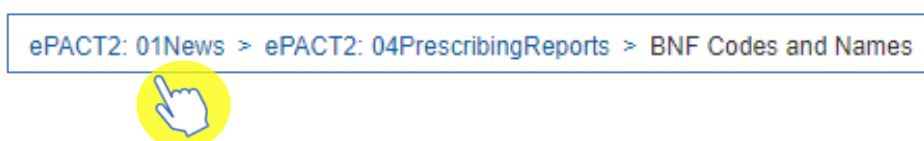
1. From the 'ePACT2' toolbar select 'Dashboards'.



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'.

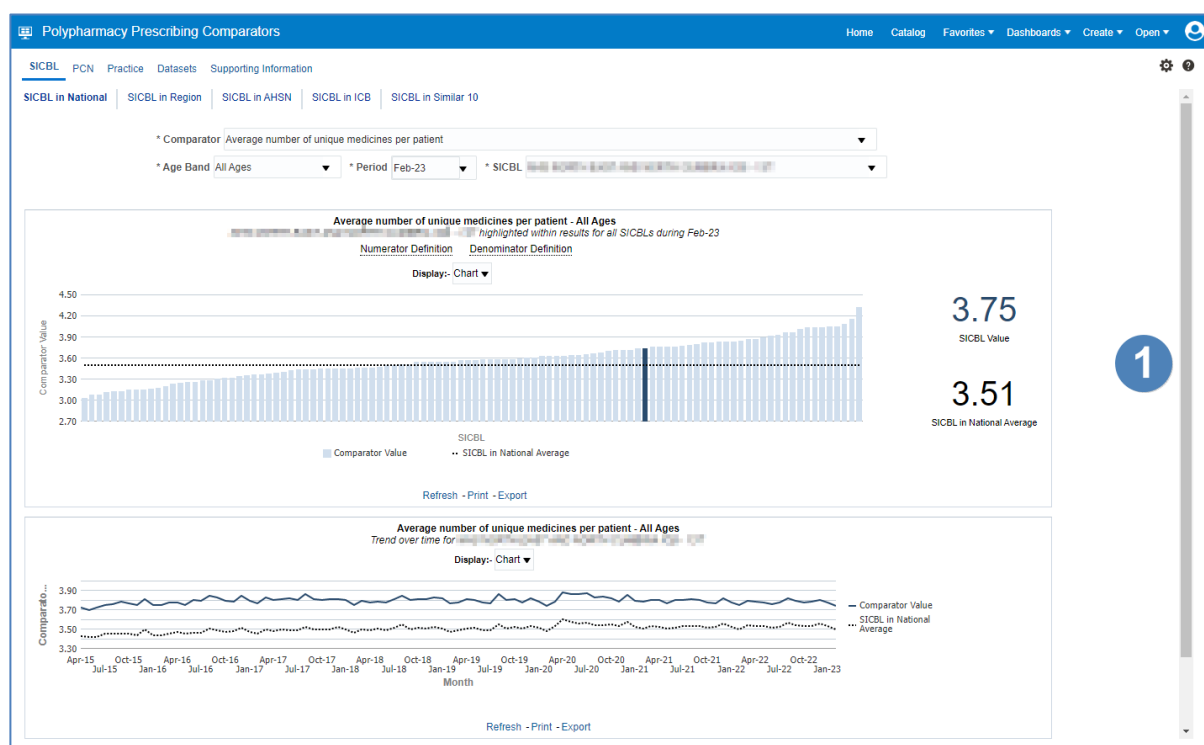


Navigating the Dashboards

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.



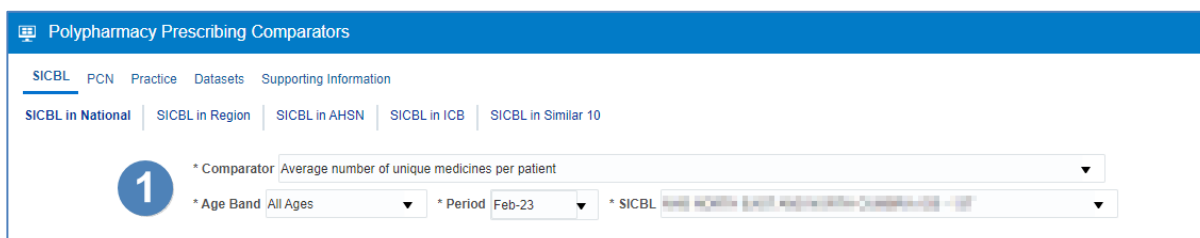
2. A selection of links will be available to allow you to navigate across different organisation levels of the dashboard. Select the link for the area of the dashboard you would like to view.
3. You can then choose between different sub-tabs.



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

Dashboard Criteria Selection

1. 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

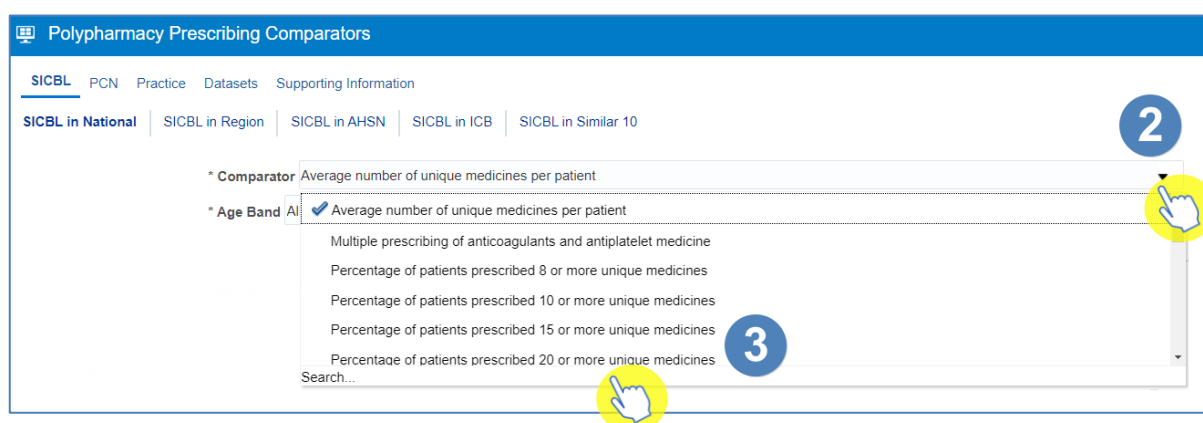
* Comparator Average number of unique medicines per patient

* Age Band All Ages * Period Feb-23 * SICBL [Organisation Name]



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

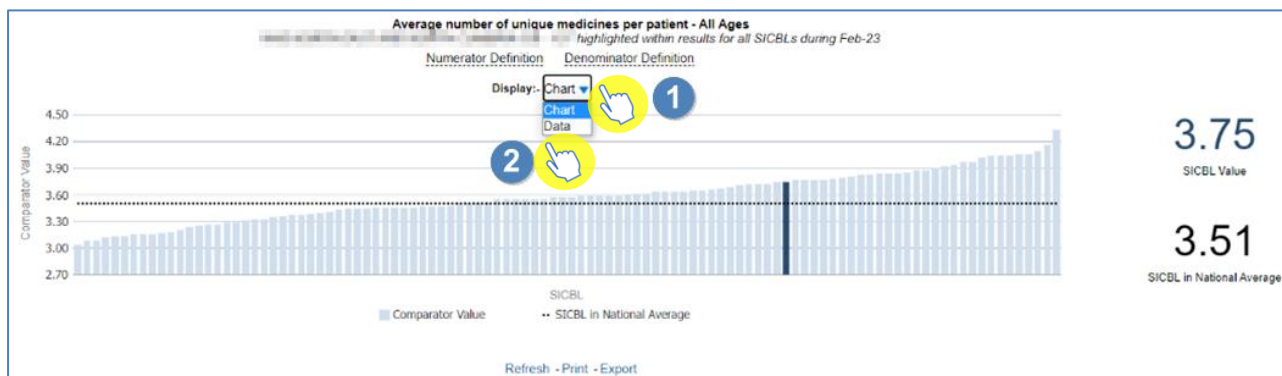
* Age Band All

- ✓ 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

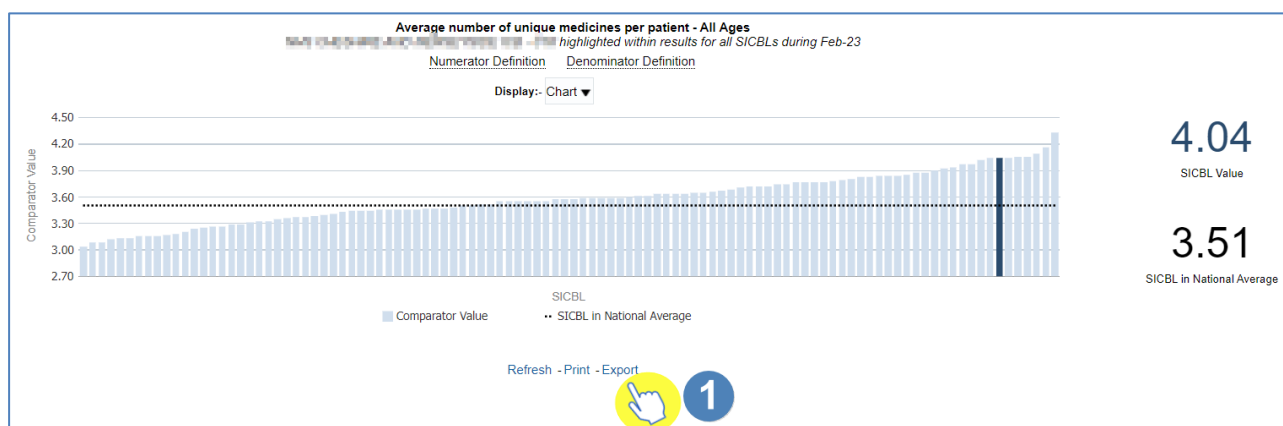
Exporting Dashboard Page

The screenshot shows the 'Polypharmacy Prescribing Comparators' dashboard. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. Below the navigation, there are tabs for 'SICBL', 'PCN', 'Practice', 'Datasets', and 'Supporting Information'. The main content area displays a chart titled 'Average number of unique medicines per patient - All Ages' with a y-axis labeled 'Comparator Value' ranging from 3.60 to 4.50. A dropdown menu is open in the top right corner, showing options: 'Edit Dashboard', 'Print', 'Export Current Page', 'Export to Excel', 'Refresh', 'Create Bookmark Link', 'Create Prompted Link', 'Apply Saved Customization', 'Save Current Customization...', 'Edit Saved Customizations...', and 'Clear My Customization'. Three numbered callouts (1, 2, 3) point to the 'Cog' icon, 'Export to Excel', and 'Export Current Page' respectively.

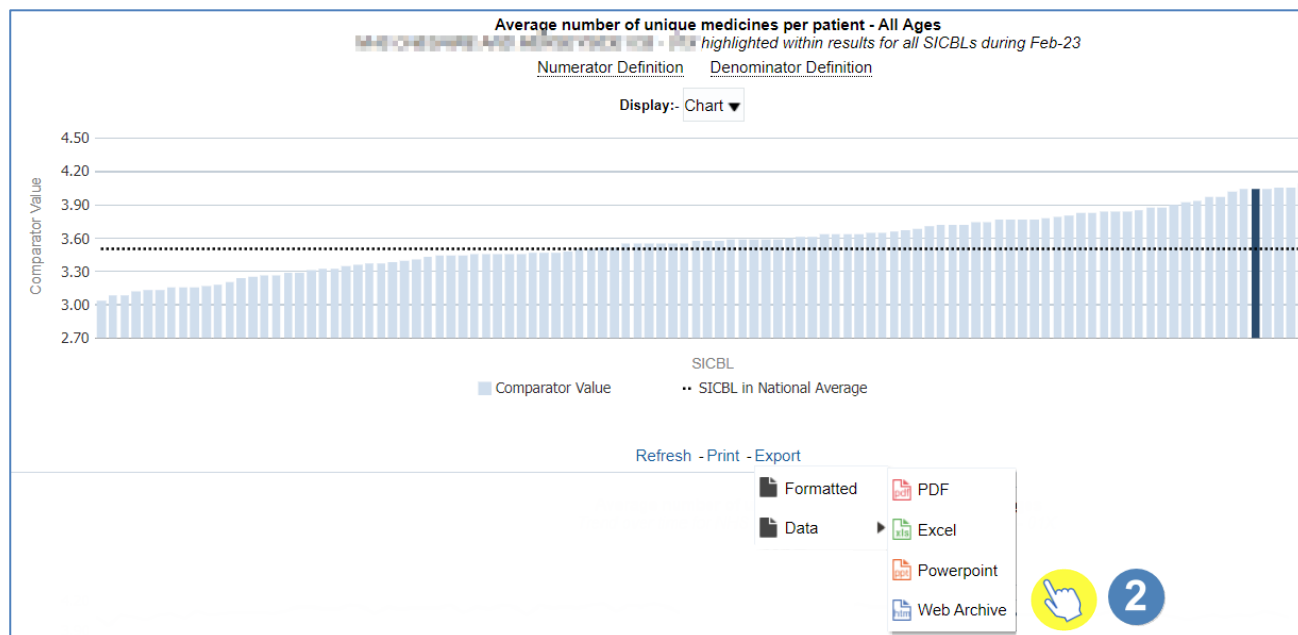
1. Select the 'cog' icon in the upper right hand corner.
2. From the drop-down list select the option to 'Export to Excel'.
3. Select 'Export Current Page'.

Exporting Individual Reports

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

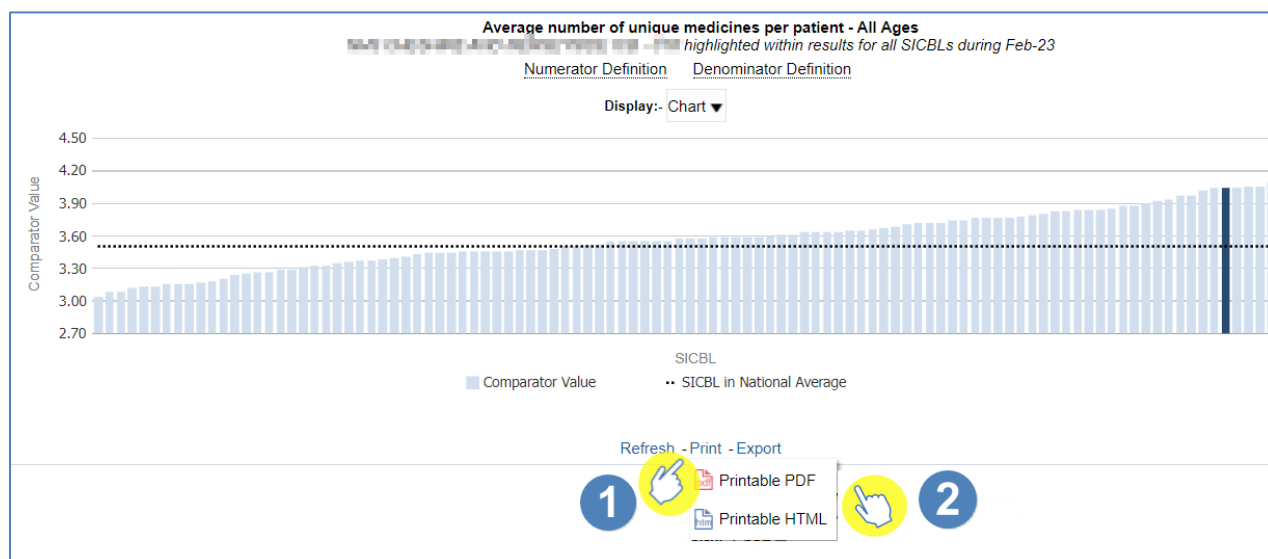


2. A drop-down list with the formats available to export in will be displayed.
3. Select the format required from the list presented.



Printing

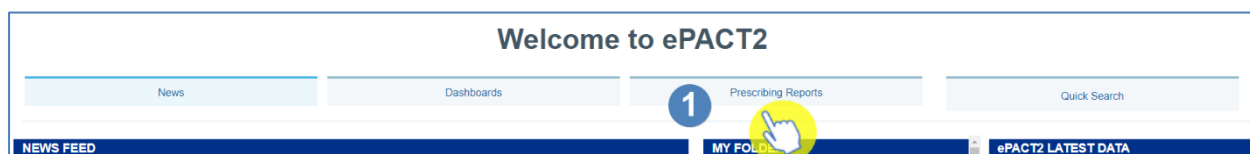
1. Select the 'Print' option below the report required.
2. Select the format required from the drop-down list presented.



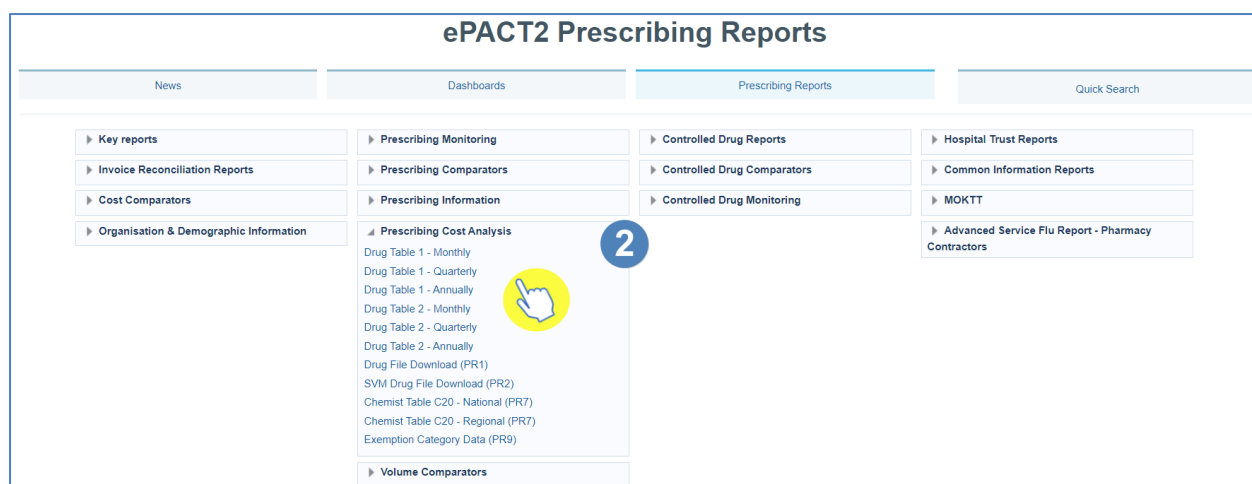
Accessing the Pre-built Reports

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'



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.



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 Practices within a Commissioner/Provider Supporting Information **1**

Commissioner/Provider - Quarterly | Commissioner/Provider - Monthly **2**

* QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Selection] * COMMISSIONER/PROVIDER: [Commissioner/Provider Selection] **Apply** **Reset**

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Selection] - [Commissioner/Provider Selection] in Jan - Mar 23 (2 Months)

Net ingredient 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

3 * QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Selection] * COMMISSIONER/PROVIDER: [Commissioner/Provider Selection] **Apply** **Reset**

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Selection] - [Commissioner/Provider Selection] in Jan - Mar 23 (2 Months) **4**

Net ingredient cost (£)
12,994,159.85

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 Practices within a Commissioner/Provider Supporting Information

Commissioner/Provider - Quarterly | Commissioner/Provider - Monthly

* QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Selection] * COMMISSIONER/PROVIDER: [Commissioner/Provider Selection] **Apply** **Reset**

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Selection] - [Commissioner/Provider Selection] in Jan - Mar 23 (2 Months)

Net ingredient cost (£)
12,994,159.85

Print - Export **5**

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.

1. 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.

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:

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

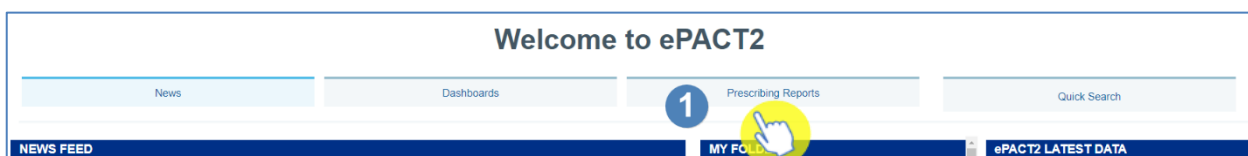
If you wish to edit the information returned within a 'Report Template' report it is possible to edit the report.

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'.

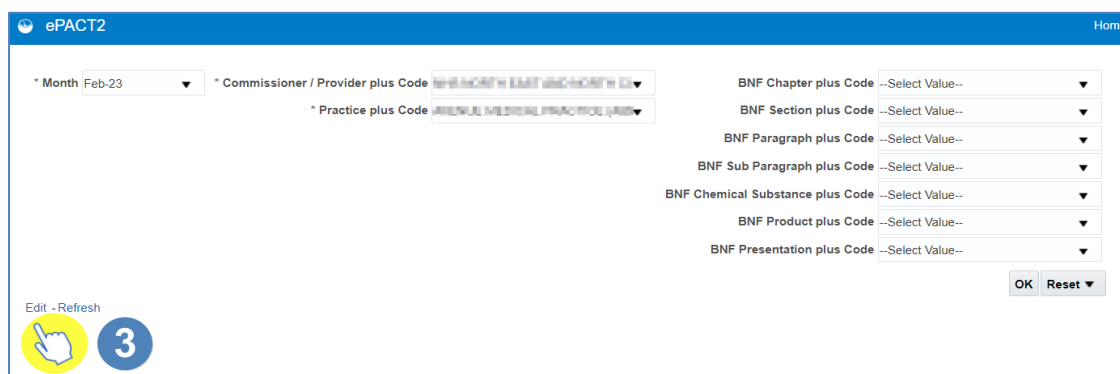
1. From the Landing page select 'Prescribing Reports'



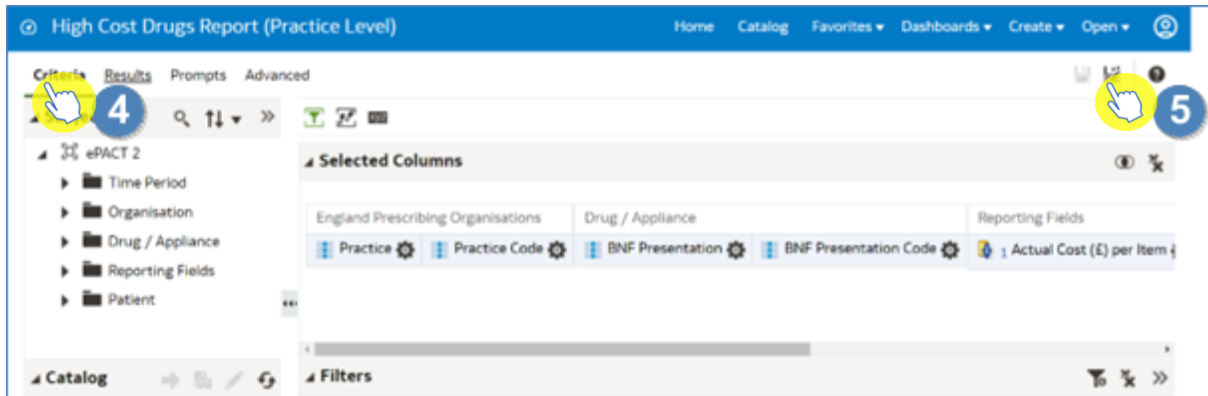
2. Select the report you wish to view by selecting the blue link of the report.



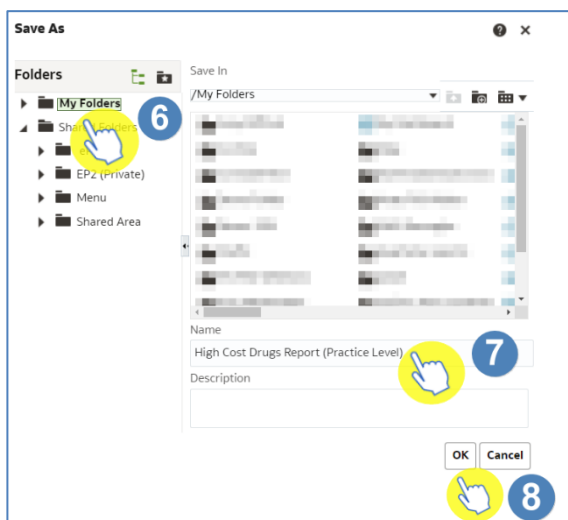
3. From the criteria pane select 'Edit'.



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.



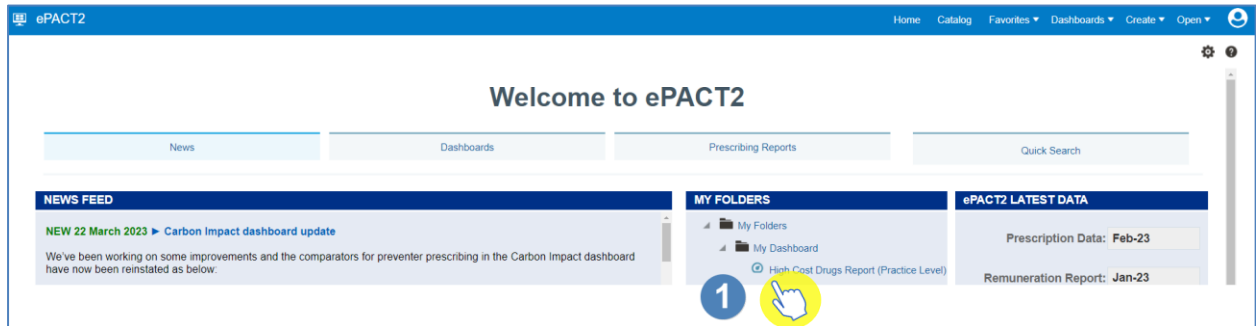
6. Select the folder you want to save the report to.
7. Name the report appropriately.
8. Select 'Ok' to save the report.



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.



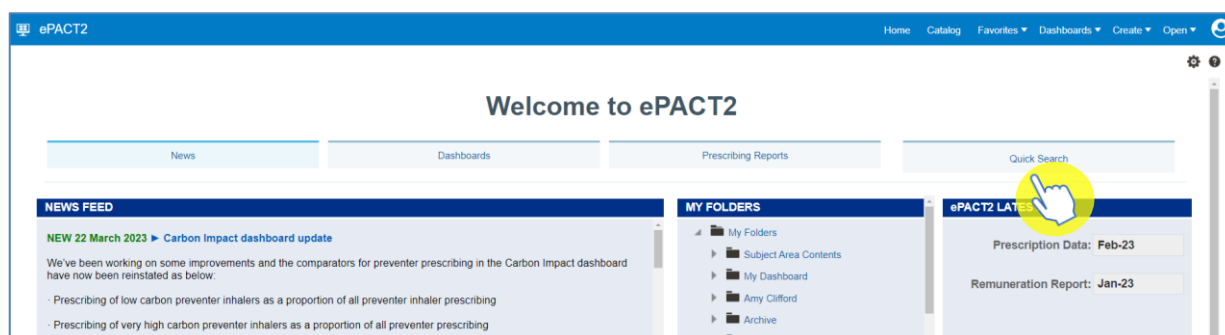
Using Quick Search

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'.



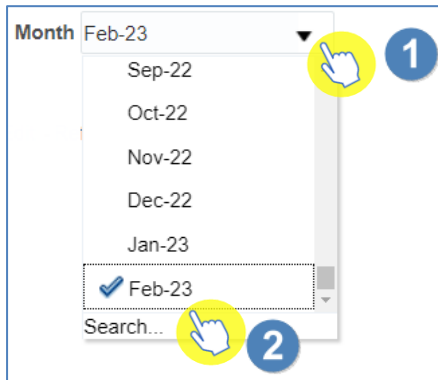
2. The 'Quick Search' will then open in a new tab, and you will be presented with the 'Quick Search' criteria pane.

1) 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

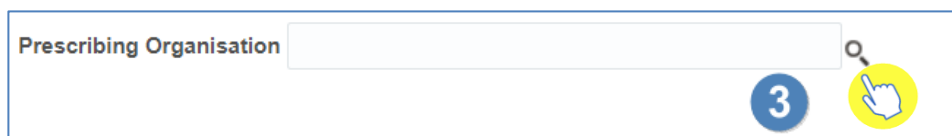
Completing the Quick Search criteria

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

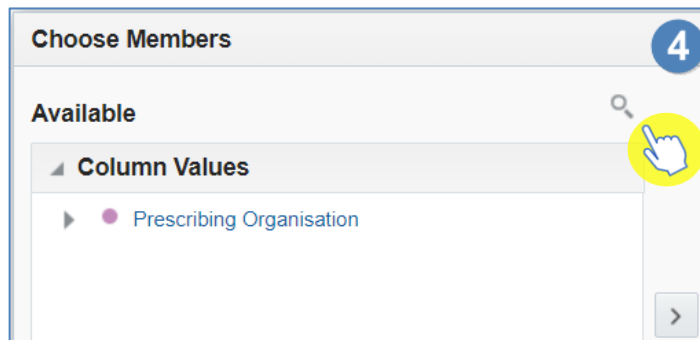
1. To view a different time period, select the drop-down arrow for the time period.
2. Select the time period you require.



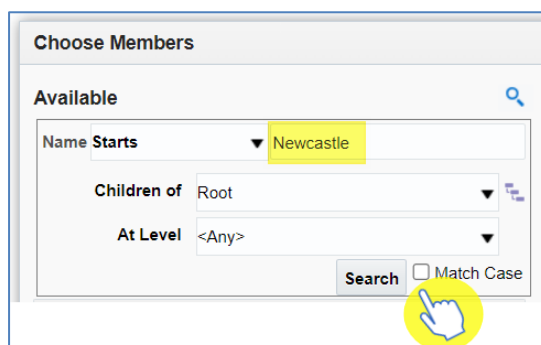
3. Select the magnifying glass icon next to the 'Prescribing Organisation' box.



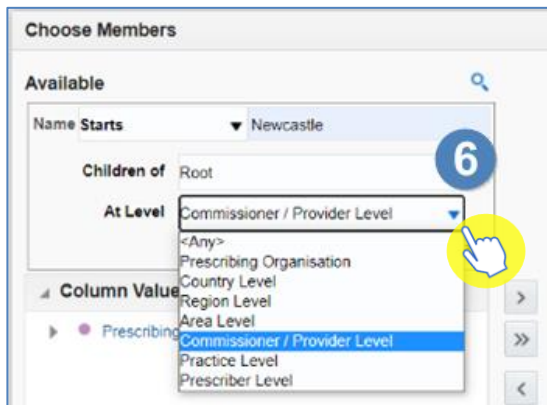
4. Select the magnifying glass icon at the top of the 'Choose Members' box, this will bring up the search function.



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

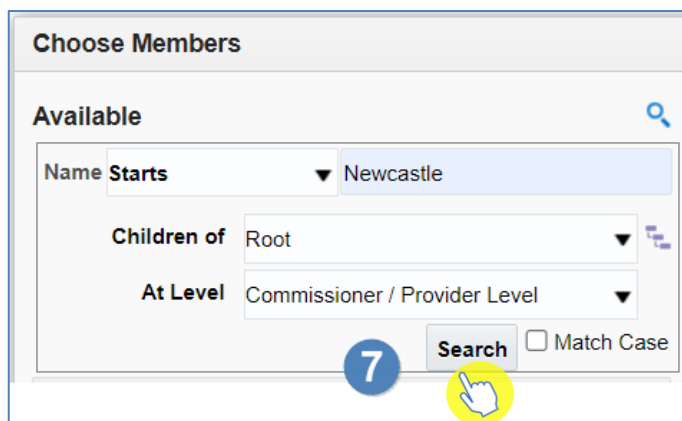


6. Select the drop down arrow of the 'At Level' box and select the organisation level you wish to search at.



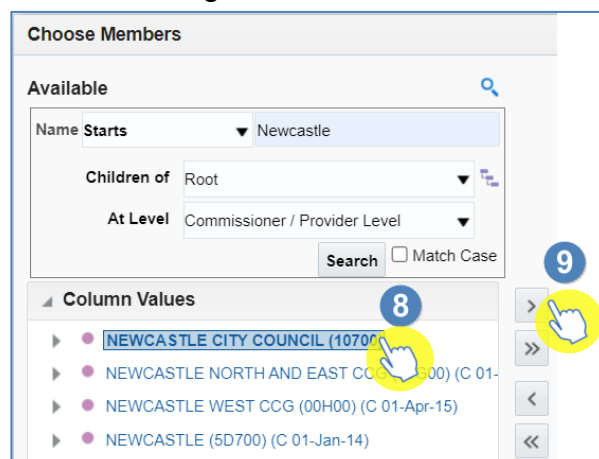
CCG's, Hospital Trusts and ISHP's are held at Commissioner/Provider level. Selecting your organisation level will ensure your results are returned quicker, as the system is only looking for your organisation in this level.

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

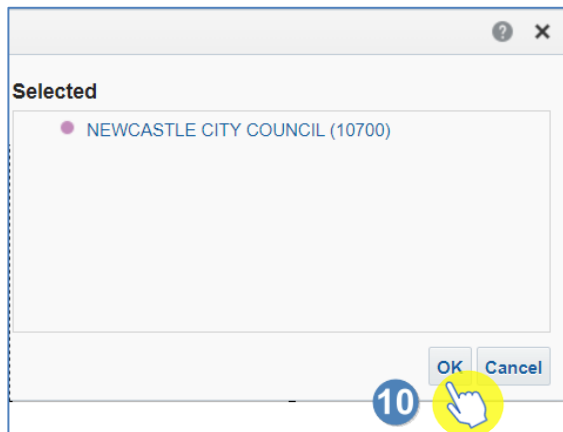


8. Click on your organisation.

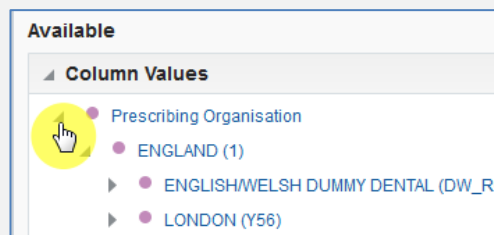
9. Select the single arrow icon.



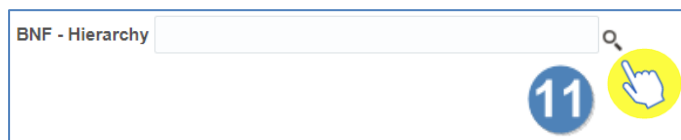
10. Select 'OK'.



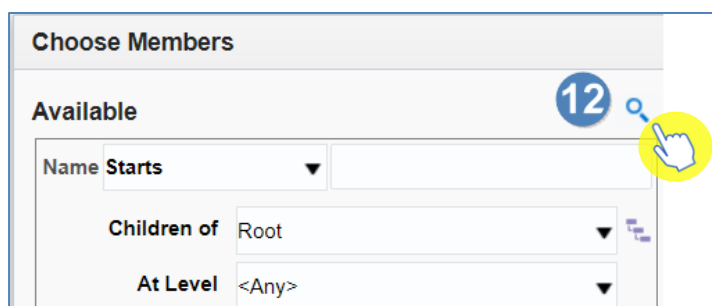
Alternatively, you can navigate to your organisation by selecting on the drop-down arrow titled 'Prescribing Organisation' and navigate down through the organisation structure.



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

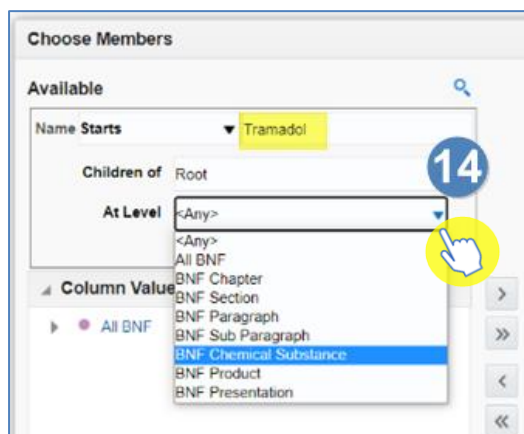


12. Select the magnifying glass icon to bring up the search function.



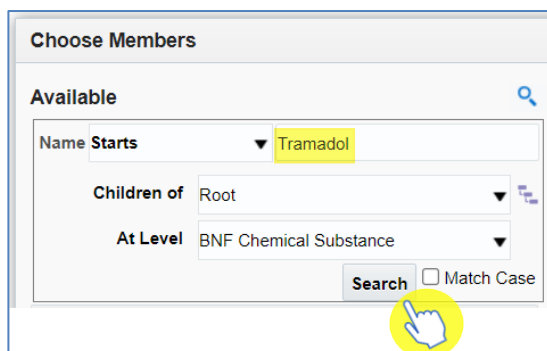
13. Type the name of the drug you are searching for, in this example it is Tramadol.

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



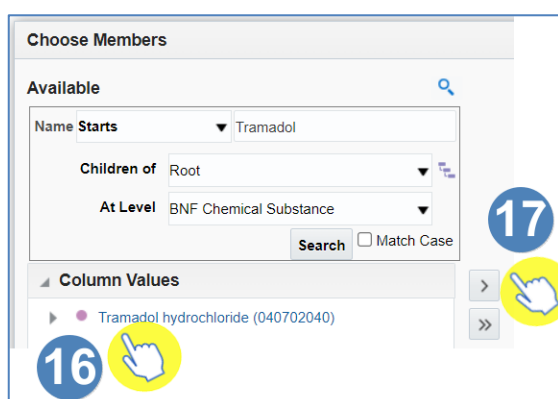
If you do not know the level of the product you are searching for, by leaving the 'At Level' box as 'Any' this will bring back every level of the BNF that contains the name of the drug you are searching for.

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

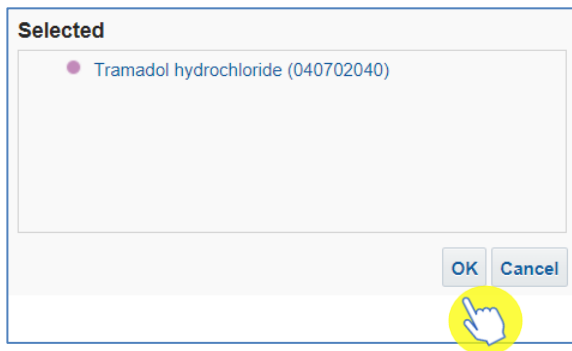


16. Click on the item you want, in this example it is 'Tramadol Hydrochloride (040702040)'

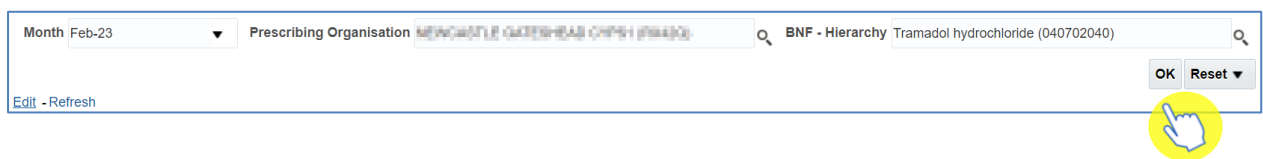
17. Select the single arrow, to move the item to 'Selected'.



18. Click on OK



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



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 [ePACT2 user guides page](#)

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](#)