ePACT2 User Guide

Accessing Financial Management Reports – IPP and Remuneration

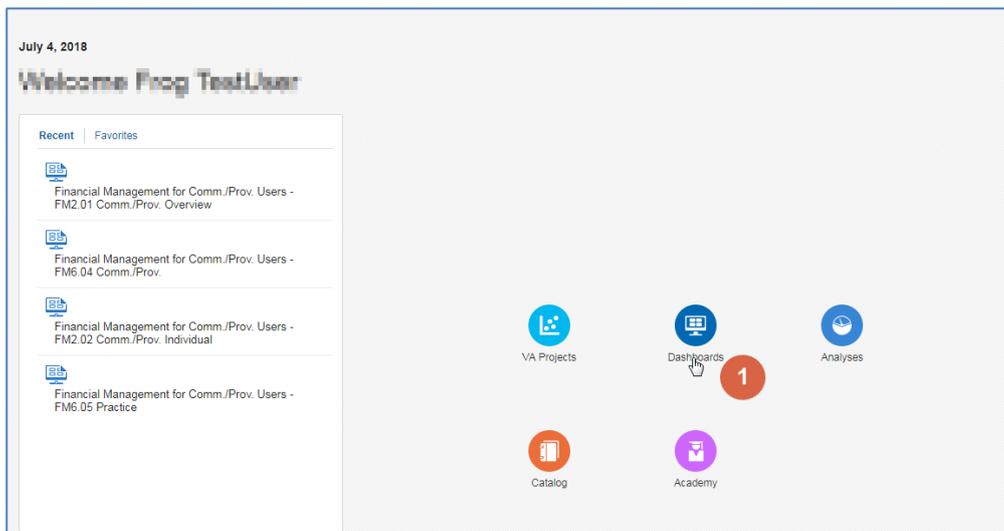## Contents

Finding the IPP and Remuneration Reports

Log-in to ePACT2 using the user ID registered for the system and your password associated with the user ID.

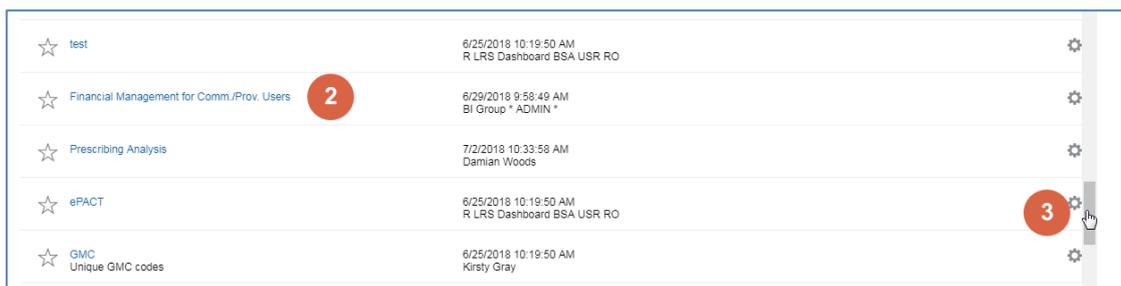Once you have signed in the system 'Home' page will be displayed.

The Financial Management Reports are located within the Dashboards area of ePACT2. To access the Dashboard list:

1.   From the system 'Home' page select the Dashboards icon.

2.   Select the link for 'Finance Management for Comm./Prov. Users from the list available.

> Area Team users the link will say 'Finance Management for Area Users'

3.   It may be necessary to scroll through the list of dashboards available to view the link for 'Finance Management'.

The 'Finance Management' dashboard will open:

For Comm. /Prov. Users the report page will be displayed as:

Financial Management for Comm./Prov. Users

Itemised Prescribing Payments   Remuneration Values

Commissioner/Provider Overview | Commissioner/Provider Individual

* MONTH	COUNTRY	REGION	LOCAL OFFICE	AREA		
Apr 18 ▾	ENGLAND ▾	--Select Value ▾	--Select Value ▾	--Select Value ▾	Apply	Reset ▾

FM2(C4). Itemised Prescribing Payments
Prescriptions dispensed by pharmacy and appliance contractors in Apr 18

Commissioner/Provider	Area	Practice Comm./Prov. prescribing (£)	Unidentified prescribing (£)	Unidentified deputising services (£)	Community prescribing (£)	Adjustments to charge statements (£)	Lost batches of prescriptions (£)	Elements for which resources have been retained centrally (£)	Total reimbursement (£)
UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST (RK900)	DEVON,CORNWALL&ISLES OF SCILLY AREA (Q66)								
Totals									

For Area Team Users the report page will be displayed as:

Financial Management for Area Users

Itemised Prescribing Payments   Remuneration Recharges   Remuneration Values

Commissioner/Provider Overview | Commissioner/Provider Individual

* MONTH	COUNTRY	REGION	LOCAL OFFICE	AREA		
Apr 18 ▾	ENGLAND ▾	--Select Value ▾	--Select Value ▾	--Select Value ▾	Apply	Reset ▾

FM2(C3). Itemised Prescribing Payments
Prescriptions dispensed by pharmacy and appliance contractors in Apr 18

| Commissioner/Provider	Area	Practice Comm./Prov. prescribing (£)	Unidentified prescribing (£)	Unidentified deputising services (£)	Community prescribing (£)	Adjustments to charge statements (£)	Lost batches of prescriptions (£)	Elements for which resources have been retained centrally (£)	Total reimbursement (£)
CORNWALL P'SHIP NHS FOUNDATION TRUST (RJ800)	DEVON,CORNWALL&ISLES OF SCILLY AREA (Q66)								
DEVON PARTNERSHIP NHS TRUST (RWV00)	DEVON,CORNWALL&ISLES OF SCILLY AREA (Q66)								
DEVON,CORNWALL&ISLES OF SCILLY AREA TEAM (Q6600)	DEVON,CORNWALL&ISLES OF SCILLY AREA (Q66)								
KERNOW CCG (11N00)	DEVON,CORNWALL&ISLES OF SCILLY AREA (Q66)								
LIVEWELL SOUTHWEST	DEVON,CORNWALL&ISLES								

Using the Itemised Prescribing Report (IPP)

The Itemised Prescribing Report tab will be opened by default.

The IPP reports are split into 2 sections:

1.   Comm./Prov. Overview – which is an overview of all organisations that the user has access rights to view

2.   Comm./Prov. Individual – shows individual reports for each organisation
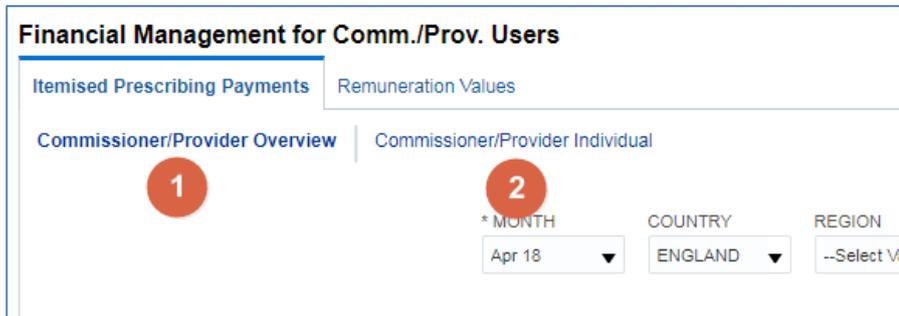
Comm. /Prov. Overview

Within the Comm. /Prov. Overview report a selection of prompts will allow the user to change or limit the data displayed within the Overview.

1. Month – Allows the user to select the time period the wish to view data for. Data will be available from April 2018 onwards, if a time period earlier than this is selected the report will return a message of 'No Results'.

2. Country – Allows the user to limit information to a selected Country, data is only available for 'England'.

3. Region – Allows the user to limit information to a selected Region. If a Region is selected which the user does not have access rights to the system will return a message of 'No Results'.

4. Local Office - Allows the user to limit information to a selected Local Office. If a Local Office is selected which the user does not have access rights to the system will return a message of 'No Results'.

5. Area - Allows the user to limit information to a selected Area. If an Area is selected which the user does not have access rights to the system will return a message of 'No Results'.

6. Apply – Confirms the selections made and regenerates the report to display the selected information.

7. Reset – Will reset any selections made to the default settings.

Comm. / Prov. Individual

A selection of prompts will be displayed within the report to allow the user to select the report required.

1.   Month - Allows the user to select the time period the wish to view data for.

> Data will be available from April 2018 onwards, if a time period earlier than this is selected the report will return a message of 'No Results'.

2.   Commissioner/Provider – Allows the user to select the organisation they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

3.   Apply – Confirms the selections made and regenerates the report to display the selected information.

4.   Reset – Will reset any selections made to the default settings.

5.   Print – Will display the available formats the report can printed in.

6.   Export – Will display the available formats the report can be exported in.

Using the Remuneration Reports

Commissioner / Providers Users will have access to Remuneration Values Reports which can be accessed by choosing the Remuneration Values tab within the Financial Management dashboard:
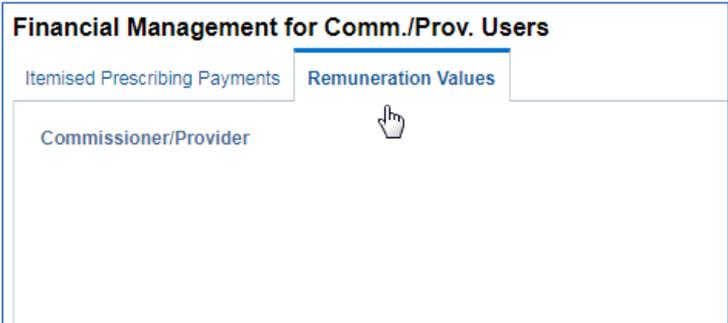
Area Level users will have both the Remuneration Values and Remuneration Recharges tab:
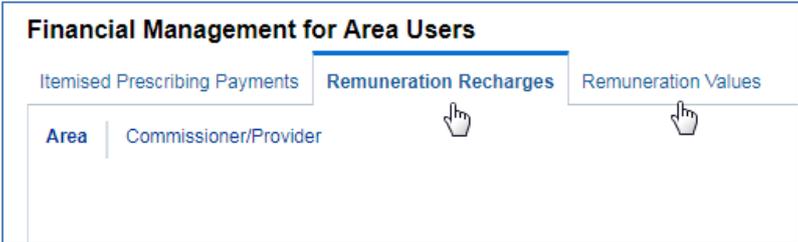
Remuneration Values

Remuneration Recharges report will show:

- A summary for a dispensing month

- An itemised listing for a dispensing month

Summary

A selection of prompts will be displayed within the report to allow the user to select the report required.

1. Month - Allows the user to select the time period the wish to view data for.

2. Area – Allows the user to select the Area they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

3. Apply – Confirms the selections made and regenerates the report to display the selected information.

4. Reset – Will reset any selections made to the default settings.

5. Print – Will display the available formats the report can printed in.

6. Export – Will display the available formats the report can be exported in.

Itemised Listing

All of the prompts from the Summary apply to the Itemised Listing along with 2 additional prompts:

Month - Allows the user to select the time period the wish to view data for.

Apply – Confirms the selections made and regenerates the report to display the selected information.

Reset – Will reset any selections made to the default settings.

Print – Will display the available formats the report can printed in.

Export – Will display the available formats the report can be exported in.

1. Area – Allows the user to select the Area they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

2. Commissioner/Provider – Allows the user to select the organisation they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

Practice Level

To view the Remuneration Values summary and itemised report down to practice or unit level:

Select the CCG or Trust that you want to see in detail from the Remuneration Values summary

A Practice summary and Practice itemised listing will be displayed:

Practice Summary:

Practice Itemised Listing:

A selection of prompts will be displayed within the report to allow the user to select the report required.

Month - Allows the user to select the time period the wish to view data for.

Practice – Allows the user to select the practice they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

Apply – Confirms the selections made and regenerates the report to display the selected information.

Reset – Will reset any selections made to the default settings.

Print – Will display the available formats the report can printed in.

Export – Will display the available formats the report can be exported in.

Remuneration Recharges

Area Level users also have access to the Remuneration Recharges report:

Remuneration Recharges report will show:

- A summary for a dispensing month

- An itemised listing for a dispensing month

Summary

A selection of prompts will be displayed within the report to allow the user to select the report required.

1. Month - Allows the user to select the time period the wish to view data for.

2. Apply – Confirms the selections made and regenerates the report to display the selected information.

3. Reset – Will reset any selections made to the default settings.

4. Print – Will display the available formats the report can printed in.

5. Export – Will display the available formats the report can be exported in.

Itemised Listing

All of the prompts from the Summary apply to the Itemised Listing along with 1 additional prompts.

Month - Allows the user to select the time period the wish to view data for.

Apply – Confirms the selections made and regenerates the report to display the selected information.

Reset – Will reset any selections made to the default settings.

Print – Will display the available formats the report can printed in.

Export – Will display the available formats the report can be exported in

1.   Area – Allows the user to select the Area they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

Commissioner / Provider level

To view both summary and itemised Remuneration Recharges reports for CCG or Area Teams:

Click the Commissioner / Provider option:
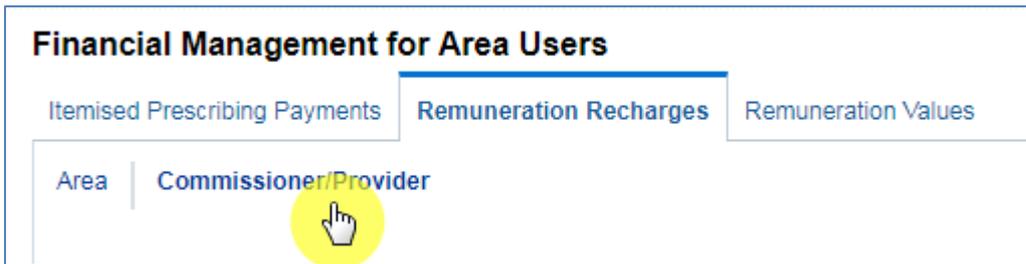
This will display the Commissioner/Provider Remuneration Recharges Summary and the Commissioner / Provider Remuneration Recharges Itemised Listings

Commissioner/Provider Remuneration Recharges Summary:

Commissioner / Provider Remuneration Recharges Itemised Listings

A selection of prompts will be displayed within the report to allow the user to select the report required.

Month - Allows the user to select the time period the wish to view data for.

Practice – Allows the user to select the practice they wish to view the report for. Only those organisations the user has access rights to view data for will be displayed within the drop down list.

Apply – Confirms the selections made and regenerates the report to display the selected information.

Reset – Will reset any selections made to the default settings.

Print – Will display the available formats the report can printed in.

Export – Will display the available formats the report can be exported in.

Further Information

Further information regarding the information contained within the reports can be accessed at https://www.nhsbsa.nhs.uk/information-services-portal-isp/isp-report-information

Getting Help

Additional training material and user guides

The NHSBSA has developed a number of how to guides to help you get the best out of ePACT2. These can be found at: Additional User Guides

WebEx sessions

WebEx will be provided on a number of different topics and features. More information about these can be found here: WebEx Training